Auerswald PBX Call Assist 2

2.0.105.43840

1   Welcome to Auerswald PBX Call Assist 2

The user help available leads you through the installation, configuration and handling of Auerswald PBX Call Assist 2.

- An overview of basic functions is shown on the page What Auerswald PBX Call Assist 2 offers to you.

- Install Auerswald PBX Call Assist 2 and make the most important settings: Installation and Base Configuration.

- Information about how to integrate your contacts in Auerswald PBX Call Assist 2 Usage of existing contact data.

- Everything about the daily work with the programme can be found under Work with Auerswald PBX Call Assist 2.

- To be able to configure Auerswald PBX Call Assist 2 ideally, please look up Auerswald PBX Call Assist 2 customize.

- Links to software updates and support can be found on the page Product support.

Help can be accessed any time from the Auerswald PBX Call Assist 2 program window via Help. Help opens by default on the subject which corresponds to the function just used by you.

In Help the following icons are used:

Icon	Meaning
➡	Note
⚠	Warning, caution
⬆	Change from earlier versions

2   What Auerswald PBX Call Assist 2 is able to offer you

The Auerswald PBX Call Assist 2 is a Unified Communications software suite for business. It combines computer-supported telephony (computer telephony integration, CTI) with features for company wide (and beyond company boundaries) online collaboration.

The Auerswald PBX Call Assist 2 provides a broad feature set for communication and collaboration with remote call control, conference, presence information, instant messaging, chat and SMS text messaging.

The Auerswald PBX Call Assist 2 with its various configuration options adapts perfectly for your personal daily working needs. The Auerswald PBX Call Assist 2 integrates well with your favourite applications for e-mail and contact data administration and optimises seamless your workflow and communication processes for business purposes.

Learn more about the essential functions and performance features of Auerswald PBX Call Assist 2 here:

2.1   Contact search: Find information about the current contact.

Auerswald PBX Call Assist 2 automatically searches in case of an incoming or outgoing call for the appropriate contact information, based on the phone number (particularly the call partner) and displays this information. Which contact data sources are searched and in which order, can be defined in the configuration of the Auerswald PBX Call Assist 2 and (by the administrator) in the Auerswald PBX Call Assist 2 UCServer. If more contacts are found from several data sources for that phone number, the contact data which was last used is displayed as active.

Further you are able to search for the contact data of a person in the search window of Auerswald PBX Call Assist 2 by entering a name or parts of it. Then start the call or other activities from the contact detail window.

2.2   ActiveContacts - actively manage contacts

The ActiveContacts technology in Auerswald PBX Call Assist 2 shows further information in addition to the contact data and the phone status of the user, e.g., calendar data of Microsoft Outlook®. The information is constantly updated in "real time". Therefore, you are always informed when and how your contacts are accessible. You are able to start and control the communication via a software menu, depending on the available information.

2.3   Presence — see the availability of your contacts

Every user connected to the system owns a status further on reffered to as *Presence*. This information is aggregated according to defined rules based on the status of several services: Telephony status (telephony service), calendar status (calendar service), login-log off (system service) and the manually entered status, provided by the user.

The presence shows at any time the current availability of the person you wish to communicate with.

You find an overview of the displayed presence symbols and their meaning under Presence symbols.

2.4   Federation - The trustworthy network

A federation is a secured structure for the communication between members of different organisations (e.g. two companies, company and customer) with the aim to improve cooperation.

Within the federation, presence management permits the exchange of current information about the accessibility/availability of people, even beyond organisation boundaries. So, a suitable method of communication can be selected (e.g. phone, e-mail, chat, etc.).

Within the frame of the federation, every organisation defines which information is revealed and decides which services and systems are used for the exchange of this information.

2.5 Journal - tracking and planning communication

The Auerswald PBX Call Assist 2 UCServer journal informs you about all communication events, e.g. completed phone calls, missed calls and unavailable call participants. The information can be filtered and arranged according to different criteria.

This allows you to keep an overview of your entire communications at all times. Important information cannot get lost anymore.

3   Installation and Base configuration

The installation of the Auerswald PBX Call Assist 2 can be done in various ways.

The Base configuration of the Auerswald PBX Call Assist 2 is done directly after the successful installation of the software.

3.1   Installation

The installation of the Auerswald PBX Call Assist 2 can be done in various ways.

- Requirements
- Manual installation at a workstation by the *.msi* file
- Installation using group policies in a network domain

3.2   Requirements

Requirements for the installation:

Operating system

- Windows® 8.1
- Windows® 10

3.2.1   Installation at the workplace

To start the installation at the workplace please double-click the *.msi* file. This starts the Windows® installer leading through the installation procedure. Several configuration options are offered to the user:

Version Information
The exact version number is displayed on the homepage.

> ⚠ If the Auerswald PBX Call Assist 2 is installed at a 64 bit operating system a message is shown that a 64 bit version of the TAPI driver shall be installed if required.

License
The licence agreement has to be read and accepted by the user before the installation can be continued.

TAPI-driver
The latest version of Auerswald PBX Call Assist 2 doesn't require a TAPI driver for communication with the Auerswald PBX Call Assist 2 UCServer anymore. All functions are provided by direct communication now. This simplifies the installation and maintenance of the software even more in Terminal Server environments. During configuration the following options can be selected:

- Do not install a Tapi driver
- Installation of the client TAPI driver
  The client TAPI driver allows third parties the dialing via TAPI. The driver uses Auerswald PBX Call Assist 2 as a connection with the Auerswald PBX Call Assist 2 UCServer to carry out the dialing process. No additional TCP/IP connection is required and the installation and servicing of terminal servers are considerably easier than with TAPI.

- Installation of the enhanced remote TAPI driver
  With the help of this driver, third party manufacturer's software can use all functions via TAPI and the Auerswald PBX Call Assist 2 UCServer. Nevertheless, this driver needs another TSP/IP connection with the server.

Connection to the server
Please enter the server here to be connected with the Auerswald PBX Call Assist 2.

The server name or its IP address is entered in the input field when using static configuration.
By using Find Server ... all available servers of the local network are listed in a window. The following information is shown regarding the servers found:

Computer name	Computer name of the server
Version	Information about the installed version of the Auerswald PBX Call Assist 2 UCServer
Method of localization	Broadcast means, that the server has answered a search inquiry on the local network. DNS service record means, that the server was setup in the DNS as a service provider.

If a DNS Service Location Record is used for the configuration of the server the Auerswald PBX Call Assist 2 UCServer should be found and configured automatically.

➡ The setup of a server side DNS Service Location Record is further explained in the help system of the Auerswald PBX Call Assist 2 UCServer.

Once the target folder for the program installation is entered the software installation completes by installing all files on the system.
Afterwards please start the Base configuration by activating the checkbox and select *finsish*.

3.2.2   Installation using group policies

You can install workstations in the network automatically with the help of the group policy. Proceed as follows:

1. Define which components should be installed on the single workstations. Use the Windows® Installer in administrator mode for this. Start *msiexec/a client.msi*. You can now define a directory in which the prepared installation should be copied.
   This need to be an accessible network share. Then select the software components to be installed on the workstations and specify the Auerswald PBX Call Assist 2 UCServer computer.
2. Start the Active Directory® user and computer management console in which you configure your domain users. Group your users (or computers) in such a way that you have organisational units. You can create group guidelines for each organisation-unit which controls the automatic installation of software.
   Open an organisatonal unit's properties.
   Go to Group policy. Add a new group policy.
   Open group guidelines with *Edit*.
   Add either under *computer configuration - software settings - software installation* or under *user*

configuration - software settings - software installation a new package.
Then select the installation package previously prepared via the administrative installation. Read the appropriate documentation on Windows Server®, Active Directory® and group policies.

3.3   Base configuration

The base configuration of the Auerswald PBX Call Assist 2 occurs directly after the installation of the software. The base configuration can also be started any time later via the Windows® start menu at the Auerswald PBX Call Assist 2 Workstation Settings. The following configuration options are available:

- Language selction of the Auerswald PBX Call Assist 2
- Select Auerswald PBX Call Assist 2 UCServer
- User log-in information in the Auerswald PBX Call Assist 2 UCServer
- User settings: general user information
- User settings: contact address and user profile picture
- User settings: telephone numbers
- User settings: services
- Groupware connection
- Start options

Basic user settings are to be done by the Auerswald PBX Call Assist 2 UCServer Administrator. Beside the central configuration several options can be configured at the workstation using the *Auerswald PBX Call Assist 2 workstation settings*. This way it is possible to fully maintain the workstation settings. If the user got the right from the administrator to configure the workstation settings by himself the user may change the settings anytime.

⚠   The configuration of specific configuration options requires administrative Auerswald PBX Call Assist 2 UCServer access rights. The user may need to login as administrator in this case. At the related configuration page a login option as administrator appears.

3.3.1   PBX Call Assist 2 language

By default Auerswald PBX Call Assist 2 will use the current language set by the user for Windows®. If this language is not available the Auerswald PBX Call Assist 2 will use english as its language.

If you want to change the language of the client, you can do this with the Auerswald PBX Call Assist 2 workstation setup. Administrators can define the language with Active Directory® group policies. This prohibits changes by the user.

3.3.2   Connection to the server

The responsible Auerswald PBX Call Assist 2 UCServer can find Auerswald PBX Call Assist 2 through different ways:

- Static Auerswald PBX Call Assist 2 UCServer configuration
  With static configuration the host name or the IP address of the Auerswald PBX Call Assist 2 UCServer is required. Via the button Search servers… all Auerswald PBX Call Assist 2 UCServer available on the network can be displayed. Afterwards select the correct Auerswald PBX Call Assist 2 UCServer.
- Use DNS service location record
  By activating option Use DNS Service Location Record all necessary information about the Domain Name Service is provided to the Client.

Secure encrypted connection (TLS) is required
This option will force encrypted data transmission between Auerswald PBX Call Assist 2 UCServer and Auerswald PBX Call Assist 2. A corresponding certificate must be stored on the Auerswald PBX Call Assist 2 UCServer computer.

Use these settings for all users
Auerswald PBX Call Assist 2 supports hosting scenarios in terminal server environments in cooperation with several independent Auerswald PBX Call Assist 2 UCServer instances.

➡ The Use These Settings for All Users checkbox will only be available on the system-wide server configuration dialog.
Activate this checkbox if you use *only one* Auerswald PBX Call Assist 2 UCServer system or all users on this computer (especially for terminal servers) should only use one Auerswald PBX Call Assist 2 UCServer system. With this option, all users on the computer will be use the system-wide settings.
If you use several Auerswald PBX Call Assist 2 UCServer instances and the users of one computer (especially for terminal servers) should connect to different Auerswald PBX Call Assist 2 UCServer instances, this checkbox should *not* be activated. Thereby, the server connection data will specified explicitly for each user logged in and may be configured optionally from the workstation setup dialog from the Server Configuration for This User tab or from Login Account through Auerswald PBX Call Assist 2.

➡ A user-specific configuration of the server connection data will be taken into consideration by Auerswald PBX Call Assist 2, the SDK components and the advanced remote TAPI driver. In contrast, the automatic updating service and the multiline TSP will always use the system-wide server configuration, regardless of the server configuration for all users.

3.3.3 User authentication

The Auerswald PBX Call Assist 2 UCServer supports two options for the user authentication:
Decide either to log-in with your Windows® user name or provide the user name and the password which were configured in the Auerswald PBX Call Assist 2 UCServer for you.

➡ If users are administered in the Auerswald PBX Call Assist 2 UCServer, a new user profile can be entered with a *New* user name after authentication as Auerswald PBX Call Assist 2 UCServer administrator.

3.3.4 User settings: general user information

Here you can enter or update the user's information.

Property	Description
User name (login)	This is the user name for logging onto the Auerswald PBX Call Assist 2 UCServer service. If Active Directory® is used, this name will be the same as the Windows® login name.
Identity	The user's identity to be clearly identified in the Federation scenario. This identity address ideally corresponds to the e-mail address of the user. Therefore this user is also accessible

	via the Federation from outside of the company.
First name	The user's first name (e.g. Arthur).
Last name	The user's last name (e.g. Dent).
Displayed name	This is the user's full name (e.g. Arthur Dent). This can occur several times and is only used for display purposes. If the field is empty, a suggestion is automatically shown when the first and last name are entered.
Email Address	This is the email address of the user. Among other things, it will be used for notifying the user about missed calls and voice-mail messages.
(UC-)Password	The section for changing the password will only be displayed, if the user has been authenticated by Auerswald PBX Call Assist 2 UCServer itself. If Active Directory® is used, this section will not be displayed.

3.3.5   User settings: contact address and user profile picture

Here you can enter the contact address of the user or update and add a user's profile picture.

Contact address shows all relevant contact details for the user. You may add a contact picture, which will be shown on various places in Auerswald PBX Call Assist 2. This picture will be shown to server users and to federated contacts depending on the given permissions.

➡   The user picture will be scaled free of distortions when added or loaded.

3.3.6   User settings: phone numbers

The user's phone numbers are displayed as provided in his contact data. This refers to the Auerswald PBX Call Assist 2 UCServer user as well as to Federation contacts. Auerswald PBX Call Assist 2 UCServer will detect the telephone lines for the phone numbers while loading the user profiles. The user will be assigned the phone lines associted with them automatically without further configuration.

Business phone numbers can be selected from the telephone line list via Select....

➡   User phone numbers and line numbers must be entered in the Supercanonical format in the integrated user administration. Phone numbers from Active Directory® will be shown as entered in the Active Directory®. When user profiles are loaded in Auerswald PBX Call Assist 2 UCServer, these numbers will be reformatted to supercanoncial format.

Property	Description
Business	The user's primary business phone number
Private	The user's private phone number

Mobile	The user's cellphone number. This phone number is used, for example, to set up an automatic call diversion and to send SMS text messages.
Voice mailbox	Phone number of the user's mailbox. The mailbox is the personal answer machine. This phone number is used, for example, to set up an automatic call diversion.
Recording server	The phone number of an external call recording server. This field is only required if an external server is used and not the integrated call recording server. If this field contains a phone number then this number is used for the phone call recording. Without a phone number, the centrally configured number is used.

3.3.7   User settings: services

Here you can configure or view which Auerswald PBX Call Assist 2 UCServer services and functions the user may use.

Field	Value
Start chat	If this option is activated the user may send text messages to other users.
Use phone books	If this option is activated, the user is allowed to use phonebooks as a contact data source.

3.3.8   Groupware connection

Here you can define which product integration is allowed.

- Use Auerswald PBX Call Assist 2 with Outlook®
  The client will connect to an Outlook/Exchange installation if this checkbox is checked
  MAPI and/or Exchange Web Services (EWS) can connect with Outlook® or Exchange.
  If Outlook® is used, check the Use Auerswald PBX Call Assist 2 Plug-in with Microsoft Outlook® checkbox to activate Auerswald PBX Call Assist 2 Plug-in for Outlook®. With this option enabled, an additional toolbar will be added to Outlook®, which provides access to some Auerswald PBX Call Assist 2 functions in a context sensitive manner. See Integrating Microsoft® Outlook/Exchange for more information.

3.3.9   Start options

Here you can define, when the Auerswald PBX Call Assist 2 will be started.

Start Auerswald PBX Call Assist 2 with Windows® logon.
If this option is selected, Auerswald PBX Call Assist 2 will start when the user logs on to the computer. This option can also be changed in the settings of the program itself.

Start Auerswald PBX Call Assist 2 now
With this option, Auerswald PBX Call Assist 2 will start for initial use immediately after installation has completed.

Profile dialog
This dialog shows all configures mailboxes. Mailboxes can be added or removed here, and the default mailbox can be selected.
Mailboxes read from Outlook® will be shown greyed-out and cannot be removed.

- o **Default mailbox**
  In this mailbox tasks will be saved (if wanted), and appointments used to create a presence state.
- o **Use EWS only (deactivate MAPI)**
  Deactivates the MAPI-interface. Without this checkbox, MAPI and EWS will be used at the same time.
- o **Monitor Outlook® inbox with EWS**
  With this setting Auerswald PBX Call Assist 2 watches the default mailbox and shows unread mails.

Add mailbox dialog
Auerswald PBX Call Assist 2 can log on to an Exchange-Server with your Windows® credentials or using usename and password.
The necessary Exchange Web Services URL can usually detected automatically, and you only have to enter your e-mail address.

- o **Email Address**
  The e-mail address of the mailbox that should be added.
- o **Server URL**
  The Exchange Web Services URL which should be used.
  This is usually similar to 'https://yourserver.domain/EWS/Exchange.amsx'
- o **Detect server URL automatically**
  This URL can usually be detected by Auerswald PBX Call Assist 2 automatically.
  If this is not possible, you can disable the auto detection and enter the URL manually.
- o **Use Windows® Login**
  If it is possible to authenticate against the Exchange Server by using your domain credentials, this option should be set.
  Otherwise, Auerswald PBX Call Assist 2 will ask for an username and password.

4   Usage of existing contact data

Contact data from other programs can be implemented or searched for. Auerswald PBX Call Assist 2 functions can be used from Microsoft Outlook® and Microsoft® Exchange. More information about supported contact data sources can be found on the following pages.

- o   Supported data sources
- o   Cooperation with Microsoft® Outlook/Exchange

4.1   Supported data sources

Contact data source integration is an integral part of Auerswald PBX Call Assist 2. Based on contact data, Auerswald PBX Call Assist 2 offers you an extensive catalogue of functions which ideally support you in your work.

In Auerswald PBX Call Assist 2 numerous contact data sources can be linked:

- o   Auerswald PBX Call Assist 2 User
  This Auerswald PBX Call Assist 2 UCServer provided data source gives you access to all user, who are using Auerswald PBX Call Assist 2 on the same Auerswald PBX Call Assist 2 UCServer along with you. As a rule, these are your work colleagues who also use Auerswald PBX Call Assist 2.
- o   Lines
  This data source is also managed by Auerswald PBX Call Assist 2 UCServer by your administrator and gives you access to all available phone lines in your phone system.
- o   Auerswald PBX Call Assist 2 Favorites
  The data source Favorites gives you quick access to all the contacts you have stored in your favorites.
- o   Outlook®
  With Auerswald PBX Call Assist 2, you can use all contact data stored in your Outlook® client. Thereby, you may choose to only use individual contact folders or all contact folders for an Outlook® inbox. You can also choose to include public contact folders, if your Exchange system provides them and you have access to them.

4.2   Cooperation with Microsoft® Outlook/Exchange

Auerswald PBX Call Assist 2 works closely with Microsoft Outlook®. This cooperation is based on two components:

- ▪   Joint data usage
  Auerswald PBX Call Assist 2 uses the MAPI interface for accessing information from Outlook® or providing new information to Outlook®.
- ▪   Outlook® user interface toolbar
  In order to be able to use Auerswald PBX Call Assist 2 functions from Outlook®, a COM add-in can be installed upon request, which will add a toolbar to the Outlook® user interface for quick access.

4.3   Joint data usage

Contacts
Contact information from the Outlook/Exchange database can be sought and displayed by Auerswald PBX Call Assist 2.
Contacts from other data sources can be comfortably created in the Outlook/Exchange database via Auerswald PBX Call Assist 2 so that they are also available there.

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4.4   Auerswald PBX Call Assist 2 Plug-in for Outlook®

To make context-sensitive access to Auerswald PBX Call Assist 2 features directly from Microsoft Outlook®, installation will add a plug-in-toolbar to Outlook®. Making calls, searching for contacts and creating tasks will be made possible by this plug-in.

Installation
The toolbar is set up as part of the Auerswald PBX Call Assist 2 installation.

5 Work with Auerswald PBX Call Assist 2

You can find out how to use Auerswald PBX Call Assist 2 for your tasks from here. Please choose a subject.

- Program start and overview
- Manage contacts
- Use presence information
- Plan communication
- Communicate

5.1 Program start and overview

You can find out how to start or stop Auerswald PBX Call Assist 2 and become familiar with the programs' user interface from here. Please choose a subject.

- Auerswald PBX Call Assist 2 start and shut down
- Main window
- Login account
- Menu bar icon
- Speech bubble info

5.1.1 Auerswald PBX Call Assist 2 start and shut down

Start
As configured during the basic configuration (start options), Auerswald PBX Call Assist 2 should automatically start with Windows®. This can also be set afterwards via the Auerswald PBX Call Assist 2 My Computer settings in the Windows®-start menu.

Auerswald PBX Call Assist 2 can be started manually at any time by the Windows®-start menu.

Exit
Auerswald PBX Call Assist 2 will be closed by Close item on the main menu or the corresponding entry on the context menu for the tray icon.

5.1.2 Login account

In the dialog "login account" the user account can be configured in order to log onto the Auerswald PBX Call Assist 2 UCServer.

5.2 Configure UCServer

If the server configuration was not specified for all users during the Auerswald PBX Call Assist 2 installation or via the group guidelines, the Auerswald PBX Call Assist 2 UCServer can be changed (which the Auerswald PBX Call Assist 2 connects to) via the dialog "Login account".

Configure automatically
If the system administrator configured a DNS Service Location Record for the Auerswald PBX Call Assist 2 UCServer, the Auerswald PBX Call Assist 2 UCServer can be automatically located and configured.

Search server
All available Auerswald PBX Call Assist 2 UCServer's in the network can be localized and placed into the input field for the server name with the dialog "Search server".

5.3   Configure User account

Enter here the user name and the corresponding password to log on to the Auerswald PBX Call Assist 2 UCServer.

Use Windows® Login
If the system administrator activated the Auerswald PBX Call Assist 2 UCServer authentication via the Windows® domain, it is alternatively possible to use the Windows® login.

5.3.1   Main window

The main window Auerswald PBX Call Assist 2 gives you access to the functions supporting your everyday work.

The significant sections of the main window will be described by the following material.
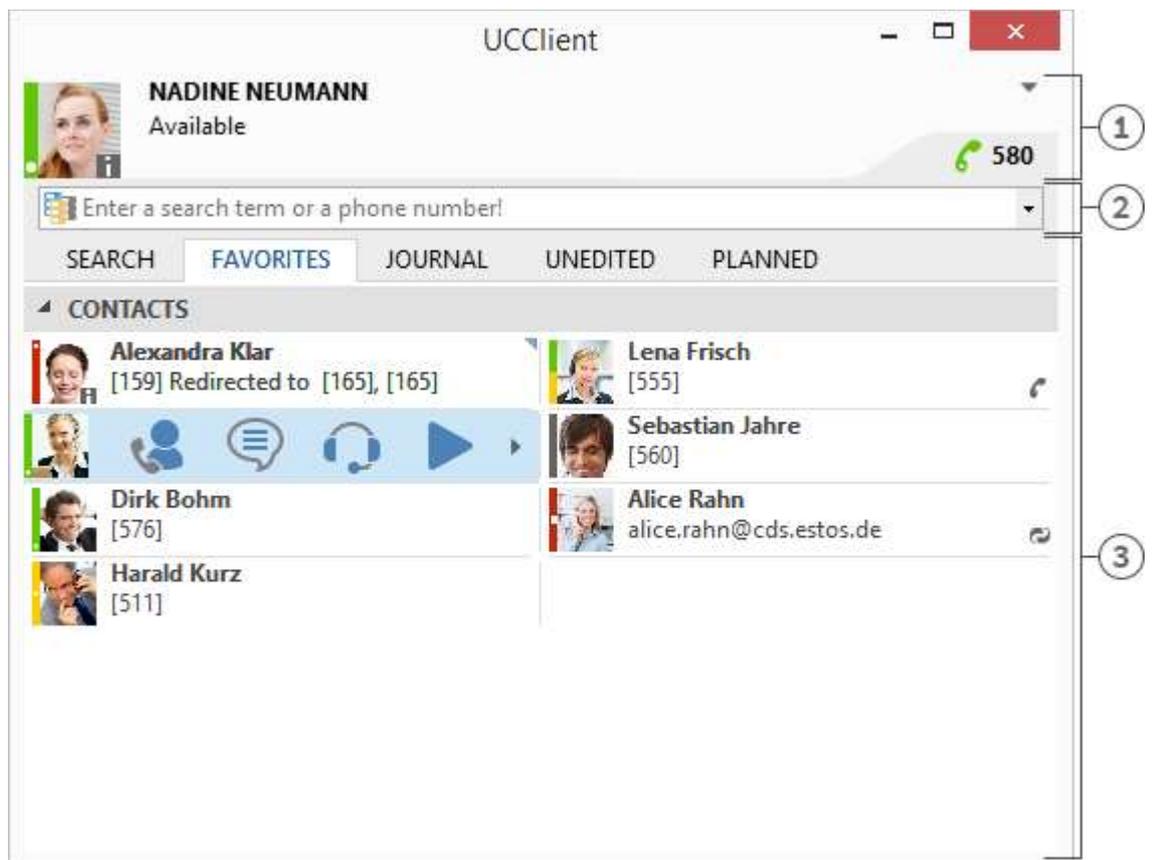
[1] My own presence
[2] Search input
[3] Tabs for Contact Search, Favorites, Journal

5.3.1.1   Main menu

The main menu can be opened with the main menu button ▼ which is situated in the top right corner.

It has features which will support you in your daily routine or with which you can adjust Auerswald PBX Call Assist 2 to your personal needs.

- 🔧 Settings
  Click here to open the Settings. Here you can define or change the most important Auerswald PBX Call Assist 2 settings.
- ⍰ Help
  Opens this online help
- ⓘ About PBX Call Assist 2
  Here you get information about the product version of Auerswald PBX Call Assist 2 and you have the possibility to get more detailled support informations and log files.
- ✕ Exit
  Exit Auerswald PBX Call Assist 2

5.3.1.2   Search input line

You can use the search input at any time to quickly find your contacts or to simply dial a number.

5.3.1.3   Tabs

The following tabs can be put in the foreground:

- Contact search
  Lists the hits for a contact search
- Favorites
  Space for your most important contacts and speed-dial keys
- Journal
  Collects the last calls made and received

5.3.2   Menu bar icon

The symbol in the notification area always gives you a fast access to the Auerswald PBX Call Assist 2 main windows. Just left click on the symbol.

During a call, you can always move the Conversation Window into the foreground. If a conversation window is not open or all conversation windows have been displayed, the main window will be shown. Furthermore, your current Presence Status will be shown on the tray icon.

In contrast, if you right-click on the tray icon, you will have access to the following features from the context menu:

- Presence Profile
  The Presence Profiles menu will display all configured presence profiles and allow quick changes to your own presence. In addition, a presence status that was potentially changed manually can be reset using the Restore Status option. For more information, see Your Own Presence.

- ⚒ Settings
  Open the Auerswald PBX Call Assist 2 withSettings in which you can adapt
  Auerswald PBX Call Assist 2 to your requirements.
- 🔑 Login account
  The dialog "Login account" let you inspect the current server connection or log in
  to Auerswald PBX Call Assist 2 UCServer under a different user account.
- ❓ Help
  Opens this online help
- ⓘ About PBX Call Assist 2
  Here you get information about the product version of Auerswald PBX Call Assist 2
  and you have the possibility to get more detailled support informations and log
  files.
- ✕ Exit
  Exit Auerswald PBX Call Assist 2

5.3.3 Speech bubble info

The info dialog is a small window at the edge of the screen, which will provide information
about missed calls, new email messages, new chats and scheduled calls.

If you have missed a call or received a new email, for example, the info dialog will be always
displayed. Thus, you will immediately be able to see all of the important information at a
glance. You can also change to the relevant view immediately if you click on the desired
field:

Field	Function
Missed calls	This opens the Unprocessed tab in the main window. You can therefore see your missed calls at a glance.
E-mails	Click the e-mail field to open Outlook's Inbox and view your new e-mails.
Chats	Click the chat field to open the unedited. If there is one single unedited message the window Message is opened directly for a reply.

You can also close the informational speech bubble window either by clicking on the Close
icon at the top left of the window or by deactivating the corresponding option on the
Behavior tab on the Settings dialog.

5.4 Manage contacts

Here you can find out how to find contact details for a person in your database and how to
organize this data. Please, choose a subject:

- Search contacts
- Contact details
- Telephone number formats
- Authorizations
- Favorites
- The Phone-Link

5.4.1   Search contacts
5.4.1.1   Search with input line

The connected data sources are browsed via the search input line. The contacts found will appear on the Search tab and can be immediately used for your work or, for example, dragged to the Favorites list for later use.
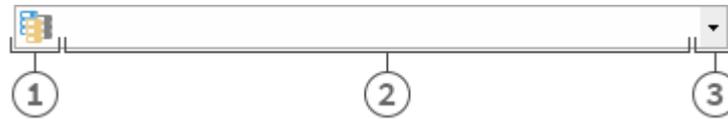
[1] Data source selection
[2] Search input
[3] Extended search / last search terms

You can use the search input with four different search variants:

- Name search
  The name search is the default search case. All contacts with the specified search term in the last name, first name, company name and display name fields (insofar as they exist) are sought. For some data sources, such as Outlook® or Exchange Web Services, additional entries for name searches can be indicated using the Datasources tab.
- Phone number search
  A phone number search instead of a name search is started as soon as you enter a search term in the search input field which Auerswald PBX Call Assist 2 can interpret as dialable . All contacts are found who have the searched phone number in a phone number field.
- Search by e-mail address
  A search across all e-mail fields is started if Auerswald PBX Call Assist 2 recognises the search term as an e-mail address. All contacts are found who have the specified e-mail address.
- Detail search
  With help of the detail search you can search for terms in dedicated fields. For example you can search for all contacts with name "estos" in the city "Starnberg".

  The detail search uses a syntax where all search terms are seperated by comma. The position of the term in the line of commas determines the field where this term is search for.

  Detail search example

  - You are searching for contact "Anna Meier". Enter the last name in the first position and the first name in the second position. The searchentry is "Meier, Anna".
  - You are searching for contact "Anna Meier". The town and the postcode are in fourth position. The company name is left empty as this is not known. The search input therefore reads "Meier, Anna,Starnberg".
  - You can also use the postcode (Starnberg's postcode is "82319"). The search input then reads "Meier, Anna,, 82319" or "Meier, Anna,, 82319 Starnberg".
  - You are looking for contact "Meier" in "Munich Street". The street is in fifth position. The town is not known and is therefore left empty this time. The search input reads "Meier,,,,Munich". Please note that, as with all other search terms, the street name does not have to be written out in full.

- You are looking for contact "Meier" with the phone number "08151123456" (Germany). The search input for this reads "Meier,,,,,08151123456".

- Advanced search entry
  The advanced search is started via the arrow symbol at the end of the search line. It is helpful for users who do not want to use the comma syntax while searching. When entering the search criteria the appropriate comma syntax is entered automatically in the search field.

5.4.1.2 Search tab

The search results are received on the Search tab if a new search has been started by entering the search criteria in the search field.

All available functions for the selected contact are displayed in the context menu. The contact menu appears if you click a contact with the right mouse button. Alternatively you can also press the context menu button or the Enter key on the contact.

Some functions which can be used on contacts will be highlighted as links on the shown contact. So if you want to call the contact, just move your mouse over the phone number and left click it. The following table lists all such availible functions.

Type	Description
Display name	Opens the Contact details for the contact. Alternatively, you can open the contact with a double click.
	Press the CTRL key at the same time (when possible) to open and edit the contact.
	If the current contact was automatically generated because a contact matching the search criteria was not found, that contact may be saved in Outlook® using this link, by double clicking in Outlook® or through Exchange Web Services.
Address field	Opens the Web browser and displays the address on the map.
	When pressing the CTRL key at the same time a route to the contact is found.
Phone number	Dials the number on the phone and sets up a call to the subscriber.
	If you press the CTRL key down while you click on the phone number, the phone call is prepared. Press the CTRL key at the same time as the Shift key, while you click on the phone number, and the phone call is planned.
Email Address	Opens the e-mail editor and enters the e-mail address as the recipient.
Presence	Start a new chat with the contact with presence identity.

identity (e.g. SIP-URI)	
Website	Opens the Web browser with the Internet address which was stored in the contact.
Data source (or data source icon)	Opens the contact folder storing the contact. Please note that this feature will only be available for Outlook® and Exchange contacts.

The presence symbol gives you the actual presence state of the found person. You can get all available presence informations about this contact in th etooltip by moving the mouse cursor over this presence symbol.

The search result list can be alternatively arranged with data source, display name, surname or company . The grouping lines can be shown or hidden. Settings can be changed in the context menu which can be accessed by a right click on the row header.

The contacts found can be sorted in ascending (A-Z) or descending (Z-A) order. Click to change the sequence on the column header where it is displayed.

The results list allows the selection of several contacts. Keep the CONTROL key pressed while selecting individual contacts with the mouse. These selected contacts can be dragged into the register card Favorites or functions may be carried out that are available for all contacts. That way, for example, you can write an e-mail to several recipients. So it is possible to write emails with more than one recipients for example.

The search result list also allows the selection and copying of single contact fields for the chosen contact. If it contains a action link, move the mouse cursor over the appropriate contact field or a little bit to the left or right beside it. As soon as the mouse cursor changes and indicates a text choice, you can select by holding down the mouse key and pulling the contact fields.

Auerswald PBX Call Assist 2 supports two different views in the results list

37.   Only the details of the last selected contact will be displayed by default. All other contacts will only show with the most important entries, such as like Name, Company,, Presence and Data Source.
38. Alternatively, you can also display the contact details in the lower area of the search list. For this, pull the divider at the lower edge of the search list upwards with the mouse. You can remove the contact details area again by arranging the divider at the lower edge of the window. You can also move the divider with the CTRL+G key combination. Now use the arrow keys to change the new size of the detail area upwards or downwards. You confirm your input with the Enter key and cancel it with the ESC key.

5.4.2   Contact details

The contact details window contains all available informations and functions for the contact in question. You may open it with the entry Open contact details… in the context menu of the contact or by double click on the contact.

All functions available for the contact are to be found in the icon bar at the upper edge of the window:

- ▪ 🟩 Make call
  You can dial every phone number of a contact. The numbers are categorized with symbols:
    - ▪ 🏭 Business phone number
    - ▪ 📱 Mobile phone number
    - ▪ 🏠 Services - software
    - ▪ 🖼 Further phone numbers
- ▪ 📞 Prepare call
  This function permits you to prepare a call. Prepared calls are created directly before a call and permit you to select special parameters such as project parameters etc. before the call is connected.
- ▪ 💬 Start a Chat with the contact.
  This function allows you to start a text based chat.
- ▪ 📇 Create new contact
  Click here if you wish to use the existing contact as a template for a new contact. A typical application is a further contact person in the company.
- ▪ 📁 Contact folder
  Select this entry to open the contact folder where the contact has been stored. Note that this feature will only be available if the contact originated from Outlook® or Exchange Web Services.
- ▪ ✉ E-mail
  If you have stored an e-mail address for the contact this function opens the e-mail editor with the recipient's address already filled in.
- ▪ 🌐 Website
  If you have specified a Web site for the contact this function opens the browser and loads the relevant Web site.
- ▪ 📋 Clipboard
  This function copies all contact detail information to the clipboard. This information can thus also be used in other applications.

5.4.2.1 Overview tab

The tab Overview will show all informations about a contact which were stored. Here you can see all phone numbers, all addresses or the note for example.
Some entries are clickable like links. So you can just click on a phone number to call the contact for example, or send an email by clicking on the email address.
The tab Overview is generated using the template file *contact.xslt*, which can be adopted to your needs. For more information about adopting it see Dialog adaptation with Templates.

5.4.2.2 Journal tab

In the Journal tab all phone calls made with a contact can be found.
This inpersonated journal is mostly the same view as in the tab Journal in the main window.

5.4.2.3 Unprocessed tab

The unprocessed tab shows all entries marked as not dealt with or not read, which relate to the contact opened.
Please note that this inpersonated view is always grouped by days beacause grouping by contact does not make sense here. This is in contrast to the unprocessed tab in the main window.

5.4.3 Telephone number formats

5.4.3.1 Supercanonical number

... makes it possible to distinctivly indentify a caller. Auerswald PBX Call Assist 2 UCServer and Auerswald PBX Call Assist 2 do exclusive use this format internally for all phone numbers. For display the numbers can view reformated in a beautified form. Phone actions will be performed with the shortened version.
Supercanonical phone numbers are starting always with a '+' character and have the following format: +Country Area Number.
No whitespace characters are used. The number consists only of numerics and the '+' character.
Example: +4901234567

5.4.3.2 Service numbers

... are official phone number which cannot be given in an international format. For example the german emergency number (110) or the directory assistence (118xx). To dial such numbers with the PC, they have to be longer than the internal numbers or they have to be configured as a rule for external numbers. These numbers will be given directly as dialable without any whitespaces.
Example: 11833

5.4.3.3 Phone number

Phone number	Description
Dialable phone numbers	... will be stored in exactly the format wich is needed to dial it on the PBX. This numbers may be reformatted with the rules stored in the Auerswald PBX Call Assist 2 UCServer if needed. Examples: ▪ Phone number internal extension number ▪ Phone number external dialing code Number of subscriber 12345 in the local area network ▪ External dialing code Country Area code Phone number Number of a subscriber in a different country
Phone numbers for display	... will be used by Auerswald PBX Call Assist 2, if this format can be generated with country codes and city codes available. +Country (area code) number Example: +49 (30) 123456 Phone number of subscriber 123456 in Berlin, Germany

➡ The examples above are valid for germany and are strongly related to the according country. In the location settings you can see, which dial rules are valid for your location.

5.4.4   Authorizations

The display of information to a contact in the favorites depends on who is allowed to see the information of the user. To control this, *permissions* are necessary.
Additionally to the visibility the authorizations defines the availability of contact related functions which are accessible for the user throu the *ActiveContacts*

5.4.4.1   *Granting authorizations*

Each user can give other users or contact, who are connected to the system via federation, authorizations on the own contact or phone lines. These authorizations are strongly additive to already given adminitrative rights. You cannot remove already given rights.

Permissions can be set via the context menu of the Active Contacts (in favorites), Permissions.

Autorizations apply to contact data of the user and to dynamic informations and functions, which are provided by the Auerswald PBX Call Assist 2 UCServer. The authorizations on the contact have a fixed definition.

5.4.4.2   *Authorization inquiry dialog*

When a user adds a contact to his favorites, and the user has no permissions at this contact, the contact is (the person) prompted with a permission request to grant appropriate permissions.

The dialog shows a list with the current authorization inquiries. Every line contains the name and/or the identity of the contact requesting authorization. One or several contacts can be selected from the list.

Below the list is a drop down menu where the authorization level can be selected. The authorizations are applied for the selected contacts via a click on Apply. These contacts are then immediately placed in the first contact group in Favorites on the main window.

It can be determined that selected contacts will receive no presence information with Reject. This corresponds to the authorization level "Blocked". This definition is applied immediately but the contacts do not appear in Favorites.
If a contact that has been locked, should have more permissions, so you have to "Add Contact ..." to the favorite with his identity first.

The allocation of authorizations can also be carried out via the context menu which can be displayed by right clicking on contacts.

Close closes the authorization allocations dialog.

5.4.4.3   *Change authorization levels*

The Favorites will be able to view and change the authorizations once granted by simply using the context menu under Authorization Level.

5.4.4.4 Remove authorizations

To revoke authorizations from a contact, this is also done in the context menu with the option Blocked. Thereby the contact receives no status updates or other information like names or e-mail addresses.

If a contact from your favorites will be completely deleted, you can decide if you want to *block* this contact. If this is not desired, the authorization level is completely reset, so that this contact can start a new authorization request.

5.4.4.5 Table of user and contact authorizations

The authorizations which can be given to other users are differentiated in 5 levels:

- Blocked:
  Blocked contacts see only your name and your e-mail address and no further information about yourself.
- Public:
  Public contacts see your name, title, company and e-mail address.
- Business:
  Business contacts will see certain contact information and also restricted information about your availability.
- Team:
  Team colleagues see detailed contact information and differentiated presence information including notes.
- Personal:
  Personal contacts see detailed contact- and presence information, inclusive a note ans private data.

The overview displays by which authorization level what contact data is transmitted to other users:

Information	Blocked	Public	Business	Team	Personal
Display name	X	X	X	X	X
E-mail address	X	X	X	X	X
Title		X	X	X	X
Work phone			X	X	X
Mobile number				X	X
Private phone					X
Other number					X
Company		X	X	X	X

Office			X	X	X
Business address			X	X	X
SharePoint/Web-Site			X	X	X
Note				X	X

In Auerswald PBX Call Assist 2 UCServer further information and functions are available to give authorizations to a contact.
The following definition is valid for standard authorization levels:

Authorization		Blocked	Public	Business	Team	Personal
See presence			X	X	X	X
Set presence					X	X
See private appointments						X
See public appointments				X	X	X
First line[*]	See outgoing phone numbers			X	X	X
	See incoming phone numbers			X	X	X
	See diversions			X	X	X
	Set diversions					X
	Retrieve call				X	X

⚠ (*) These authorizations only apply within the Auerswald PBX Call Assist 2 UCServer service responsible for the user. Federation contacts or contacts from other Auerswald PBX Call Assist 2 UCServer services will not see this data!

5.4.4.6 Administratively pre-set authorizations and authorization levels

The administrator is able to allocate authorization levels or single authorizations. In this case, the administratively pre-set authorization levels cannot be minimized anymore. This means that the lowest authorization level "Blocked" cannot be selected anymore for the contacts concerned. This is because the lowest authorization level allocated by the administrator always applies.

➡ If single authorizations are administratively given instead of authorization levels, the authorization

> level can only be changed by the administrator.

> ➡ For contacts already authorized by administration settings there will be no authorization inquiry dialog.

5.4.5 Favorites

In the Auerswald PBX Call Assist 2 frequently used contacts can be stored at the tab *Favorites*. They can be sorted in freely defined groups. For more information please refer to ActiveContacts.

Special Favorites tab functions
The *Favorites* tab has special features. For example, contacts in the search result list can be added to this tab using the Add to Favorites context menu item.

Line group

Please note that your Administrator can exclusively change the contents of the group. For you the group is read only. This is by the symbol 🔒 in the title bar. If new lines are added or old ones removed, the group is automatically updated accordingly.

> ➡ If the pre-defined lines do not satisfy your needs you can copy the elements into a new group which you create and then deactivate the pre-defined group in the settings dialog. Please note, however, that this is then no longer automatically updated in case of changes.

5.4.6 ActiveContacts

Contacts are displayed as *ActiveContacts* in the Favorites tab.

In addition to ActiveContacts these entries can also be telephone lines and quick dial targets.

5.4.6.1 ActiveContacts

ActiveContacts are showing the presence of a contact. Additionally they offer buttons for call establishment, chat capabilities and they grant access to the context menu offering further functions.

The tooltip help of an ActiveContact contains all available information in text format.

A double click on an ActiveContact opens a window showing the related contact details. A right click on an ActiveContact opens the related context menu offering further functions.

Moving the mouse over the ActiveContact buttons displays a tooltip help. A left click on an ActiveContact displays the function buttons listed below:

Icon	Description
⬯	Start a Chat with the contact.
➡	The menu item **Authorisation level** enables users to change the user rights for the specific contact.

The actual presence of a contact and its services changes dynamically the availablility and status of the related indicators or buttons.

Depending on the existing authorizations for this contact the following icons are displayed:

Icon	Description
Presence	The presence icon displays the contact status.
☎	The small phone icon displays a user's line and its status. A phone is displayed for each of the user's visible lines (maximum two). If the line is diverted the phone is complemented with a small arrow.

5.4.6.2 Lines

If the entry represents a phone line the status of a line is displayed. Actions like e.g. setting call diversions are available at the context menu. The actions available are configured centrally by the system administrator. A double click on the entry invokes a phone call.

5.4.6.3 Quick dial numbers

The entry can be also defined as quick dial target. The use is of course not just limited to phone calls; user-defined actions on the phone system can also be triggered (e.g. door opener activated by entering the appropriate system code).

5.4.7 The Phone-Link

With the installation of Auerswald PBX Call Assist 2 on your system the additional URL Handler "phone:" is registered, which allows you to put HTML document references to phone numbers or to the contact details window. A visitor of an Internet site can be given the possibility to initiate a telephone call to a certain participant by clicking on a link, to open the contact detail window or to establish certain contacts in the Favorites.

The use of the URL handler "phone:" for dialing is analogous to "mailto:" within the anchor tag in the HTML code. The number to be dialled or the EntryIDs of the contact to be opened follows as a parameter immediately behind.

5.4.7.1 Dial with URL Handler

The phone Handler can easily select a phone number by clicking on a link. For this the phone number to be selected is given to the phone Handler as the only parameter.

Example:
You wish to create a dialing link for subscriber "John Smith" with phone number "+498912345678". Insert the following lines into your HTML code:

```
<a href="phone:+498912345678">call Jon Doe</a>
```

The example looks like this:
Call John Smith

5.4.7.2   Open contact detail window with the URL Handler

The phone Handler can also be used for opening contacts. The Entry-IDs of the contact (separated by ":") must be given to the Phone Handler.

Example:
You would like to create a link displaying the contact details of the party "John Smith".

For example, the subscriber "John Smith" has the following entry IDs:
Data base ID: DB06 (ODBC data source)
Data memory ID: ODBC (in case of ODBC: name of ODBC data source)
ContactID: 1 (ID of contact in the ODBC data source)

Add the following lines in your HTML code:

```
<a href="phone:ID:DB06:ODBC:1">open John Smith</a>
```

The example looks like this:
Open John Smith

➡ If Auerswald PBX Call Assist 2 contains the setting that contacts are opened by default for editing, the contact in the editor of the data source (if possible) is opened instead of the contact detail window.

5.4.7.3   Add contact in the URL Handler Favorites

The phone handler can also be used to make contact in the favorites. This can optionally be contacts from the connected data sources or contact Federation contacts.

To add a contact from a data source, the keyword "addcontact:" must be given after the keyword "phone:". Afterwards, the Entry-IDs of the contact are displayed in the same way as in the contact detail window, each separated with ":". Optionally, the tab and the group name where the contact should be filed, can be given.

➡ Without specifying a tab and group name the contact is stored at the tab "Favorites".

➡ If only the tab name is given, the contact is put in the first group in the card index tab.

➡ If only the group name is given, all tabs are searched and the first group of the same name is used.

➡ If no tab or group with the given name exists, these are automatically applied.

Example:
You want to include "John Smith" in Favorites. The participant "John Smith" has the same EntryIDs like in the example "open contact detail window".

Add the following lines in your HTML code:

```
<a href="phone:addcontact:DB06:ODBC:1" > include John Smith in Favorites</a>
```

The example looks like this:
Include John Smith in Favorites

Add the following lines in your HTML code:

```
<a href="phone:addcontact:DB06:ODBC:1:support"> include John Smith in the support group</a>
```

The example looks like this:
Include John Smith in the support group

To include a Federation contact, specify the presence identity (e.g., SIP Uri) instead of the Kontakt-EntryIDs.

Add the following lines in your HTML code:

```
<a href="phone:addcontact:john.smith@domain.de:support" > include John Smith in the support group</a>
```

The example looks like this:
Include John Smith in the support group

5.5 Use presence information

Here you find out how to control and use the presence information. Please, choose a subject:

- Own presence
- The presence of the contacts
- Presence icons

5.5.1 Own presence

The My presence display in the Main window shows the user's currently set presence information (or the information determined by Auerswald PBX Call Assist 2 UCServer) . Therefore the user can see at any time how they are visible in the system for other users. The user interface visualizes upcoming appointments, status of phones, including set call forwardings and allows access to the settings of Auerswald PBX Call Assist 2.

5.5.1.1 My presence
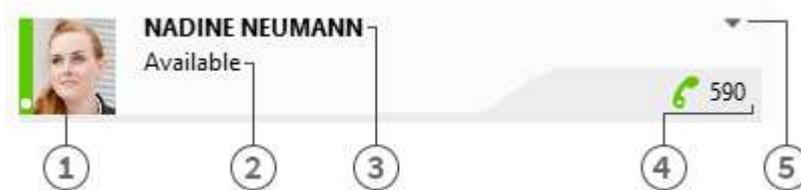
[1] My own presence
[2] State / Note
[3] Current logged in user
[4] Own lines
[5] Main menu

This area consists of several parts (in order from left to right):

- My presence
  The large presence symbol shows you your current presence state (manually set or determind from the Auerswald PBX Call Assist 2 UCServer). For more information about the symbols and colours used by Auerswald PBX Call Assist 2 see Presence symbols. If you click on the presence symbol the menu for presence settings and presence profiles opens.
- Currently logged-in users with status and memo
  The two lines of text contain the name of the user who is logged in in the first line and the status in text form below with the memo just set if present.
  If one of the texts is clicked a dialog opens to modify the current presence. The status, the memo and a Diversion profile can be selected in this dialog. These settings are immediately accepted when the "OK" button is clicked.
- Own line(s)
  All phone lines of the user will be shown as symbols. You can find more information about phone lines in Lines options.
- Main menu
  Opens the Auerswald PBX Call Assist 2 main menu.

5.5.1.2 Presence settings and presence profiles

This menu can be opened with clicking on the presence symbol and is used to change the own presence state and for configuring of presence profiles.

A presence profile is a combination of a presence state, a note and a forwarding profile. How to configure an own presence profile is described later on in this section.

Presence entries
The first part of the menu displays the currently available presence profiles. There are four pre-defined profiles, one for each presence status. The menu entry describes precisely what is set on selection.

Reset status
With this, the user can reset a manually set presence state. This does not change the memo or set call redirections.

Set memo...
This menu entry opens a small dialog in which a memo text can be entered. Memo texts which have already been used can be set again with the History… button. The text is saved with the OK button; Cancel closes the dialog without setting the text.

Delete note
Deletes the memo just set.

Set presence...
Opens a dialog with which all presence aspects can be set simultaneously. The user can select their status, the memo and a diversion profile here and set them by confirming with OK. Cancel closes the dialog without making changes to the presence.

Edit presence profiles...
Opens a dialog which can be used to configure presence profiles.
There are four default profiles, which can't be deleted but adopted to your needs.
The user can also create own additional profiles with the New button.
As well Edit as New open a further dialog which permits all aspects of a profile to be set.

5.5.2 The presence of the contacts

Every user connected to the system has his own status, his *Presence*. This information is established according to defined rules from the status of several services: Telephone status (telephone service), calendar status (calendar service), logged on/ logged off (system service) and manually entered user status.

The presence gives information about the current availability of a call partner at any time.

An overview of the displayed presence symbols and their meaning can be found under presence symbols.

5.5.3 Presence icons

Every user connected to the system has his own status, his *Presence*. This information is established according to defined rules from the status of several services: Telephone status (telephone service), calendar status (calendar service), logged on/ logged off (system service) and manually entered user status.
The presence therefore dynamically informs of the availability of a communication partner depending on the current status of the various services.

Possible presence states

Status color	Meaning
🟩	Available
🟥	Busy
🟨	Out of office
🟩	Inactive
🟥	Do not disturb
⬛	Presence information unavailable

In addition to this presence information the following additional icons are used in Auerswald PBX Call Assist 2:

Icon	Meaning
■	If a contact is not logged on to a server their status is displayed with a gray symbol.
■■	If a contact receives a call on one of their lines their status flashes red/orange
ℹ	If a contact has created a memo this is symbolised by a black "i".

Besides to the contact-based presence information the telephone lines shows a different status:

Icon	Meaning
☎	Phone line ready, no active conversation
☎	Active external call
☎	Active internal call
☎☎	Changing between red and green - incoming ringing
☎	Line faulty
➜	Active call redirection
⊘	Active call protection (the icon for the redirection is not displayed with active call protection).

5.6 Plan communication

Here you can find out how to plan and track your communication with Auerswald PBX Call Assist 2. Please choose a subject:

- Journal

5.6.1 Journal

The Journal tab in the main window shows the last calls and chats. It contains the most important information in a view. The entries are always grouped by days.

The calls displayed use the same icons on the Journal tab as in the journal browser.

- ☎ Incoming external calls (connected)
- ☎ Incoming external calls (not connected)
- ☎ Outgoing external calls (connected) and calls (not connected)

- ▪ Incoming internal calls (connected)
- ▪ Incoming missed internal calls (not connected)
- ▪ Outgoing internal calls (connected) and calls (not connected)
- ▪ TextChat

The Journal tab can filter the shown entries with various options:

- ▪ Today
  Click here to display just the calls which were made or taken today.
- ▪ Last week
  Click here to display just the calls which were made or taken in the last seven days.
- ▪ Last month
  Click here to display just the calls which were made or taken in the last 31 days.

With Auerswald PBX Call Assist 2 it is possible to filter journal entries with a freely defined text. For example type '123' into the input field of the filter options to reduce the contents of the view to entries which are containing the text '123'. Please note that using the free text filter in this view only affects the currently loaded data and hides unwanted rows for a quick access.

In the Journal tab you can configure the shown columns. You can reposition a column by left click and hold the left mouse button on the column header. Now move the mouse to the desired position. To remove a column, just move it outside the table. Right click on a column header opens a context menü. There you can change the visibility of columns and you can set the columns and their grouping options back to default. With this context menu you can open the field selection dialog. Here you can drag and drop column headers in to the table to add these columns to the view.

➡	Unedited calls and chats will be shown in bold.
➡	Calls which are answered by other users are shown in blue.
➡	Journal entries can be sorted by clicking on their column headers (reverse ordre it by click again). Please note, that journal entries are sorted within their grouping setting (per day).

5.6.2 Journal browser

The journal browser of Auerswald PBX Call Assist 2 offers a more detailed view on your calls and chats than the journal tab in the main window. Here you can get all calls of arbitrary time frames and you can group them with differently, not only ba days.

The calls displayed use the same symbols in the Journal browser as in the main window:

- ▪ Incoming external calls (connected)
- ▪ Incoming external calls (not connected)
- ▪ Outgoing external calls (connected) and calls (not connected)
- ▪ Incoming internal calls (connected)
- ▪ Incoming missed internal calls (not connected)
- ▪ Outgoing internal calls (connected) and calls (not connected)
- ▪ TextChat
- ▪ Incoming audio chats (connected)

- Incoming missed audio chats (not connected)
- Outgoing Audio Chats
- Incoming video chats (connected)
- Incoming missed video chats (not connected)
- Outgoing video chats

The journal browser has a series of filters with whose help certain calls can be displayed or hidden depending on their type.

- Default
  Clicking on this button will reset all type-based filter settings to their default values. All calls that you have made will also be displayed again.
- Incoming calls
  Activate this option to display just incoming calls. Deactivate this option to display both incoming and outgoing calls.
- Outgoing calls
  Activate this option to display just outgoing calls. Deactivate this option to display both incoming and outgoing calls.
- Internal calls
  Activate this option to display just incoming calls. Deactivate this option to display both incoming and outgoing calls.
- External calls
  Activate this option to display just external calls. Deactivate this option to display both external and internal calls.
- Calls (not connected)
  Activate this option to display just calls which were not connected. This also contains all missed calls. Deactivate this option to display both calls which were connected and calls which were not connected.
- Calls (connected)
  Activate this option to display just connected calls. Deactivate this option to display both calls which were connected and calls which were not connected.
- With note
  Activate this option to display just calls for which call memos were saved. Deactivate this option to display both calls with and calls without call memos.
- Without note
  Activate this option to display just calls without call memos. Deactivate this option to display both calls with and calls without call memos.
- Phone number hidden
  Activate this option to also display phone conversations that block the partner's phone number. Deactivate this option to only display those conversations that provided the partner's phone number.
- Public entries
  Activate this option to also display calls by other Auerswald PBX Call Assist 2 users. Please note that private calls by other Auerswald PBX Call Assist 2 users are not displayed. Equally, the journal entries of other Auerswald PBX Call Assist 2 users cannot be changed as a rule. Deactivate this option to only display your own phone calls.
- Filter journal type
  Use this feature to filter journal types. By default, all journal types will be displayed. Journal type options include: TextChats only , AudioChats only, VideoChats only or phone calls only.

In addition, Auerswald PBX Call Assist 2 supports further functions for finding journal entries:

- Date filter: Select the desired start and end date in the date fields in order to display just journal entries from within a certain period. Alternatively you can also use the pre-defined keys Today, Last week or Last month to set the time period.
- Text filter: You can filter journal entries by a freely defined text. For example, type in the name of a sought after contact into the text field and press Enter. Alternativly you can start the search by pressing the Start search button.

The journal browser has the ability to group journal entries by certain criterias. You can change the grouping option in a drop down box in the area View.

- Group by days
  All journal entries from the same day are grouped together.
- Group by contacts
  All the same conversation partner's journal entries are grouped together.
- Group by project
  All journal entries assigned to the same project are bundled.
- List view
  The journal entries are displayed without grouping.

More journal entries
By default, a maximum of 100 hits will be returned from searches by Auerswald PBX Call Assist 2. All additional journal entries corresponding to the search criteria can be requested by clicking the Additional Journal Entries button. That button is on the status bar. The button will be hidden when all log entries have been displayed.

The print function in the journal browser enables you to print either everything or only the selected journal entries as a list. It is printed the same as it is displayed on screen, i.e. with the current groupings and all visible columns.

You can freely change the columns to view in the journal browser. You can reposition a column by left click and hold the left mouse button on the column header. Now move the mouse to the desired position. To remove a column, just move it outside the table. Right click on a column header opens a context menü. There you can change the visibility of columns and you can set the columns and their grouping options back to default. With this context menu you can open the field selection dialog. Here you can drag and drop column headers in to the table to add these columns to the view.

➡ Unlike the Journal tab in the main window the journal browser must be updated manually, especially if new journal entries are added.

➡ Calls and chats marked as Unprocessed are highlighted in bold type.

➡ Calls which are answered by other users are shown in blue.

➡ The journal entries can also be sorted if you click the column headers (reverse sorting on second click). If a grouping has been set, the journal entries within each group are sorted according to the sort criterion.

5.6.3   Journal editor

The journal editor in Auerswald PBX Call Assist 2 permits you to look up and subsequently edit information on a call made or received. It can be opened by double click on the journal entry of a journal list for example.

If a contact was linked to the opened journal entry, all functions for the contact can be run via the tool bar. For detailed descriptions of these functions, please refer to Contact details.

In addition, you will find special functions in the icon bar which you can execute for a journal entry:

- 🖫 Save
  Click here to save all changes to the journal entry.
- 🖫 Save and close
  The journal entry is saved and the editor window is subsequently closed with this function.
- 🖨 Print
  Click here to print out the journal entry.
- 🖶 Print preview
  Click here to show a print preview of the journal entry. You can also print the journal entry from the preview.
- 🖶 Printer settings
  Click here if you wish to change the printer settings for printing the journal entry.
- ✔ Edited
  If this button is activated the journal entry is marked as processed. Activate this button if you wish to mark the journal entry as processed.
- ❗ Unprocessed
  If this button is activated the journal entry is marked as unprocessed. Activate this button if you wish to mark the journal entry as unedited. Unprocessed journal entries are displayed in bold type in the journal view.

The following data in the journal entry can be changed or added to with the journal editor:

- 📇 Link contact
  When the contact selection button is clicked the contact selection dialog opens where you can link the selected contact to the journal entry by clicking Ok. Please note that this process transfers both the contact name and also the company name from the selected contact in the journal editor. If a contact is linked to a journal entry, all contact related functions can be executed from within the journal entry. So you can call the contact with a different phone number again or send him an email.
- Change contact name
  You can enter any name in the contact name field which also appears in the journal views. Please note that the contact name can thus deviate from the name of the linked contact.
- Change company name
  You can enter any name to be stored in the journal entry in the company name field. Please note that the company name entered may thus be different from the company name of the linked contact.
- Edit call memo:
  Enter your call memo in the journal editor's memo field.

> ⚠️ Please note that you cannot change the journal entries of other Auerswald PBX Call Assist 2 users.

5.6.4 Unprocessed calls and chat

You will find phone calls and chats which require your particular attention on the Unprocessed tab. Depending on your settings, you will see all journal entries here that are marked as not dealt with or all "Call in absence" e-mail marked "not read". Further information can be found under Settings in the Incoming calls.

You will find the following functions on the Unprocessed tab's icon bar:

- ✔️ **Mark as edited**
  The selected entry or entries are marked as processed or read. The entries thus disappear from the view.
- ✔️ **Mark all as edited**
  Marks all entries in the view as processed or read. The view is then empty.
- 🔆 **Internal calls**
  Activate this option to additionally display internal calls. Deactivate this option to display just external calls.
- 📇 **Grouped by days**
  Click here if the entries in the list are to be grouped by day.
- 📇 **Grouped by contacts**
  Click here if the same subscriber's entries in the list are to be grouped.

In this view of Auerswald PBX Call Assist 2 it is possible to filter the entries with a freely defined text. For example, if you type in '123' into the input field of the filter options, you will only see entries which contain '123' in one of their fields.

In the tab Unprocessed you can freely configure the displayed columns. You can reposition a column by left click and hold the left mouse button on the column header. Now move the mouse to the desired position. To remove a column, just move it outside the table. Right click on a column header opens a context menü. There you can change the visibility of columns and you can set the columns and their grouping options back to default. With this context menu you can open the field selection dialog. Here you can drag and drop column headers in to the table to add these columns to the view.

> ➡️ An overview of the entry icons can be found on the Journal.

> ➡️ The phone calls can also be sorted if you click on the column headings (reverse sorting on second click). If a grouping is defined the phone calls within each group are sorted by the search criterion.

5.6.5 Call planning
5.6.5.1 Plan call

With the help of the *call planning* window you are able to mark calls which you wish to make in the future. Already planned calls can be viewed in the tab Planned in the main window.

You will find all the functions which you can use for a planned call in the editor's icon bar

- Make call
  Click the upper half of the button to call the subscriber. The phone number which was specified in the phone number field in the editor dialog is always used.
  In the lower half of the push button, you are able to view the contact context menu with the arrow. Here, you will find every activity available for the linked contact.
  For a detailed description of these functions, please refer to contact details.
- Save
  Click here to save the planned call and all changes. The saved call appears on the tab planned in the main window.
- Save and close
  The planned call is saved with this function and the editor window is then closed.
- Print
  Click here to print out the planned call.
- Print preview
  Click here to display a print preview of the planned call. You can also print out the planned call from the preview.
- Printer settings
  Click here if you wish to change the printer settings for printing the planned call.
- Delete planned call
  Click here to delete the planned call. The editor window is then closed. Please note that this action cannot be undone.

Change the status of the planned call
In the section Status on the tool bar, the status of the planned call can be define with the aid of the drop-down box:

- Set to in process.
  Select this entry if you wish to show that you are currently processing the planned call.
- Mark as completed
  Select this entry if you wish to show that you have successfully processed the planned call.
- Mark as not started
  Select this entry to indicate that the planned call is pending.
- Mark as waiting for someone else
  Select this entry if you have to wait for someone before you can make this call.
- Mark as deferred
  Select this entry to mark the planned call as postponed.

The following data for the planned call can be defined or changed with the editor:

- Change subject:
  The topic field is generated automatically when creating a new planned call. You can customise this according to your requirements here.
- Link contact
  Clicking the contact selection button opens the contact selection dialog with which you can link the selected contact to the planned call by confirming with "OK". Please note that both the contact name and also the company name are transferred from the selected contact to the editor by this process.
- Change contact name
  You can enter any name in the contact name field which also appears in the journal views. Please note that the contact name can thus deviate from the name of the linked contact.

- **Change company name**
  You can enter any name which is to be saved in the journal entry in the company name field. Please note that the company name entered can thus deviate from the name of the linked contact.
- **Change phone number**
  The phone number which is dialed when the upper half of the Call button is clicked is shown here. If you have linked a contact to this planned call you can dial one of the contact's phone numbers in the dropdown list. You can nevertheless also enter any phone number in the field.
- **Define start date**
  Enter the start date in the relevant field. This defines when the planned call is to be made. Alternatively you can open a calendar via the dropdown arrow and simply select a day.
  Note: If neither a due date nor a reminder date have been activated, these will also be entered automatically when selecting the starting date.
- **Enter date due**
  Define here by when the planned call should have been made. You can either enter the date directly or use the calendar which you can open via the dropdown arrow.
  Note: if you have not yet defined a reminder date this is automaticallly set when the due date is selected.
- **Set reminder**
  Activate this option and enter the reminder date with a time to be reminded of the call. The Reminder window opens at the given time. Please note that the reminder function is only performed for planned calls which are marked as not processed.
- **Change project PIN**
  Here you can assign the planned call to a particular project. You must first define the projects for this. You can create new projects in the settings under Projects. Please note that the project PIN can only be changed if this feature has been activated in the settings on the Projects page.
- **Change memo**
  Here you can enter a memo text for the planned call which you wish to save.

5.6.5.2 Planned calls

The tab Planned gives an overview of all phone calls which are planned with Auerswald PBX Call Assist 2.

Display of planned calls
The planned calls have different icons depending on the processing status:

- In progress
  The planned call is presently being processed.
- Completed
  The planned call has been successfully processed.
- Not started
  Processing of the planned call has not yet begun.
- Waiting
  Waiting for someone else to process the plannned call.
- Deferred
  Processing of the planned call has been postponed.

In addition, the planned call is highlighted differently depending on its status:

- Planned calls which have not yet been processed are shown in bold text

- All planned calls due in the past which have not been completed are highlighted in red.
- Completed planned calls are crossed through and appear light grey.

The view on the "Planned" tab can be customised. Entries which fulfil certain criteria can be shown or blanked out.

- Without date or reminder
  Activate this option to also display all planned calls which have neither a date nor a reminder set.
- Completed calls
  Activate this option to additionally display all calls which have already been marked as completed.

The status of the planned calls can be changed via the icon bar or the context menu. Mark the relevant entries in the list and click the appropriate button.

- Set to in process.
  Select this entry if you wish to show that you are currently processing the planned call.
- Mark as completed
  Select this entry if you wish to show that you have successfully processed the planned call.
- Mark as not started
  Select this entry to indicate that the planned call is pending.
- Mark as waiting for someone else
  Select this entry if you have to wait for someone before you can make this call.
- Mark as deferred
  Select this entry to mark the planned call as postponed.

Further functions for processing planned calls are available in the icon bar:

- Delete
  Select this function to delete the selected entries. Please note that the deleted entries cannot be restored.
- Update
  Click this button to update the view.

In this view of Auerswald PBX Call Assist 2 it is possible to filter the entries with a freely defined text. For example, if you type in '123' into the input field of the filter options, you will only see entries which contain '123' in one of their fields.

In the planned tab columns can be freely configured. You can reposition a column by left click and hold the left mouse button on the column header. Now move the mouse to the desired position. To remove a column, just move it outside the table. Right click on a column header opens a context menü. There you can change the visibility of columns and you can set the columns and their grouping options back to default. With this context menu you can open the field selection dialog. Here you can drag and drop column headers in to the table to add these columns to the view.

> Either the Auerswald PBX Call Assist 2 editor or the Outlook® editor opens to edit the planned calls depending on your settings in the Planned section.

➡ The planned calls can also be sorted if you click on the column headers (reverse sorting on second click). Please note that the planned calls are sorted within their group, in other words per day.

5.6.6 Reminder window

The reminder window reminds you of calls which you have planned. It is always displayed when a reminder for a planned call is shown. The calls are displayed in a list.

Planned calls are highlighted differently in the overview. Details about this can be found in the help file for the call schedule.

You will find the following functions in the icon bar:

- ▪ 📗 Make call
  Click the upper half of the button to call the subscriber. The phone number which was specified in the phone number field of the planned call is always used.

  In the lower half of the push button, you can call up the contact context menu with the arrow. Here, you will find any operations available for the contact. For a detailed description of these functions, please refer to Contact detail window

- ▪ 📄 Open planned call
  Click this button to open the call schedule in the list. Alternatively you can also open a call with a double-click on the list entry.
- ▪ 📄 Remind later
  Use this function to be reminded of the planned call again later. Mark the relevant entries in the list and select the appropriate time period for this.

  You can also switch off the reminder for the planned calls. Select Do not remind again from the menu for this.

- ▪ 📄 Delete planned call
  Use this button to delete the selected planned calls form the list. Please note that this function cannot be undone.

➡ When you close the reminder window it is first displayed again when a reminder for the next call is due.

➡ A complete overview of all planned calls can be found in the main window in the "Planned" tab.

➡ The reminding time can be changed if you open the planned call in the editor. Further information under Planning calls.

5.6.6.1 Edit

- ▪ 💬 Answer unread chat / continue chat
- ▪ ✔ Mark chat as read
- ▪ ✖ Delete chat. Deletes just your part of the chat. The history is not altered for other participants.
- ▪ 💾 Save selected chat as text (unformatted) or rich text (formatted).

5.6.6.2 *Search criteria*

- Date filter:
  Select the desired start and end dates in the date fields in order to display just chat from within a certain period. Alternatively you can also use the pre-defined Today, Last week or Last month keys to adjust the time period.
- Text filter:
  You can filter chat entries by a freely defined text. For example, type in the name of a sought after contact into the text field and press Enter. Alternativly you can start the search by pressing the Start search button.

5.6.6.3 *View*

- Display unread chats only
- Display a preview of the individual chat

➡	The chat history always shows all unread messages regardless of the filter settings.
➡	The chat history is automatically opened when you start PBX Call Assist 2 when you have new chats, and you have disabled the popup for new chats (see also behavior).
➡	You can continue any chat you wish. Participants can no longer be added or removed after they have been stored in the history log. (Chats no longer have a moderator)

5.7   Communicate

Here you can find out how Auerswald PBX Call Assist 2 can support you in your daily work. Please, choose a subject:

- Call window
- Line settings
- Call forwardings
- Remote Office

5.7.1   Line settings

All lines assigned to the user or computer are indicated as icons in My Presence. These change color in accordance with the telephone status of the line. Many different operations can be carried out on this line via the menus opened with a click.

5.7.1.1 *Entries in the line menu:*

- Set as default line
  If a user has more than one line, he can define via the menu which one is to be the standard line. All telephone operations not requiring specification of the user's own line relate to this line. The line is shown in bold typre.
- Telephony control
  If a line is busy with a call, you can only have a controlling influence on the call on this line. No other operations are offered.
- Set call diversion…
  Permits direct set-up of call diversion without having to configure a Call diversion

profile. The last call diversion is saved and automatically recorded in the last dialog.

▪ Cancel call diversion
Shows all items of call diversion set up on this line. If the call diversion set up can be attributed to a Call diversion profile, the name of the profile is displayed.

▪ Set call forwarding
Shows all configured Call diversion profiles currently set up on the line.

▪ Switch protection against incoming calls on/off
Permits activating or deactivating protection against incoming calls on the line.

▪ Remote Office
Redirects the extension to a phone outside of the company. Outgoing calls will display the company's number. Further details can be found under Remote Office.

▪ Configured feature codes
If feature codes for your telephone system were configured on the Auerswald PBX Call Assist 2 UCServer these will be displayed here.

▪ Activate/deactivate suppression of phone numbers
This allows you to activate or deactivate caller ID suppression for outgoing calls on the line. You will see in the menu whether caller ID is displayed or suppressed. You must activate the caller ID suppression feature in the Settings.

▪ Extended settings
  ▪ Configure call forwardings...
  Allows configuration of Call diversion profiles.
  ▪ Rename line...
  Here, you can change the name for the line. That way, it is easier to distinguish between different terminals using the same phone number.

5.7.2   Call forwardings

Call diversions can be set in several contexts in Auerswald PBX Call Assist 2.
Call diversion profiles have been integrated to support the User in being able to reuse several different often-used call diversions and at the same time to be able to divert several lines.

If a call diversion is to be set on one of your own lines this can be done via the lines button in the "My presence" area.
This opens a dialog which lists the currently available call diversions and allows them to be reset or edited.

A call diversion profle consists of a name, the line which is to be diverted (or the lines which are to be diverted), the type of diversion and the target phone number.

New
With New a new call diversion profile can be established. This opens a dialog. In this dialog, the user defines the name of the profile and selects the line to be forwarded. He can also select All if he has several lines and wishes to forward calls from all of them.

Edit
The currently selected diversion profile can be edited with this icon.

Delete
Deletes the selected profile.

5.7.3 Remote Office

The Remote Office feature makes working while on the road or at home possible. With this function, your phone number can be redirected to any phone desired (the Remote Office Phone).

This feature can be turned on and off from Line Settings. If the feature is not visible there, the telephone system does not support it.

If the feature 'Remote Office' is turned on, the behavior will change as follows:

- Calls to your phone will be forwarded to the Remote Office phone.
- If the PC is used to select phone number, the Remote Office Phone will ring first. If the call is answered, you will be connected with the selected phone number.

5.7.3.1 *Moderators:*

The initiator of a Chat is automatically the moderator. They have extended rights and can add and remove participants as well as appoint further moderators or remove moderator status.

- Add party
  After clicking the button to add users the search dialog opens in which you can see all internal users. Select one or more users and confirm the dialog to add the participants.
  Chat parties can be added per drag & drop to the Chat window (sending SMS messages for mobile contacts only, a Auerswald PBX Call Assist 2 UCServer Chat for internal users only).
  The maximum number of participants is limited to 30.
- Remove participant
  To remove a subscriber from the chat open the subscriber's context menu and select the relevant entry.
- Appoint subscriber as moderator:
  To appoint a subscriber as moderator, open the subscriber's context menu and select the relevant entry.
- Remove subscriber's moderator status:
  To remove a subscriber's moderator status, open the subscriber's context menu and select the relevant entry.

5.7.3.2 *Links:*

Auerswald PBX Call Assist 2 supports the following links in the chat window:

- Phone numbers:
  Phone numbers are highlighted as such and can be selected by clicking them as long as they comply with the rules for the currently selected line's location.
  (phone:+4912345612, +49 123 456 - 12, 12 etc.)
- E-mail links:
  E-mails are recognised and the default mail program is started by clicking it.
  (mailto:info@info.de, info@info.de etc.)
- Web links:
  Recognises all Internet links such as. (http:, https:, www:, www2:, file:, ftp:, gopher:, ntp:, prospero:, telnet:, news:, wais:)

- UNC paths:
  Recognises UNC paths. (\\server\directory\file)

➡

If links contain whitespaces Auerswald PBX Call Assist 2 cannot find the beginning and the end of the link itself. If you place these links between < and > brackets the link is correctly recognised. <u><Link with space(s)></u>

➡

To be able to chat with one participant, the Public authorization level must have been granted, at least. This authorization level may also be set administratively for internal users using global settings or group policies (see also Authorizations).

6 Customise Auerswald PBX Call Assist 2

Auerswald PBX Call Assist 2 functions can be customised to your needs in many places. The first is the settings dialog, which you can acces via the main menu.

The dialog is divided into the following catagories:

- Appearance and behavior
- Telephony
- Search
- Collaboration

6.1 Appearance and behavior

In this category you can customize the view of the client, control the behavior in certain events, assign hotkeys and shortcuts, add locations and use advanced service functions.

- Characteristics
- Hotkeys
- Advanced

6.1.1 Characteristics
6.1.1.1 *General*

Display Auerswald PBX Call Assist 2 with Windows® log-on
Use this option if Auerswald PBX Call Assist 2 is to be started automatically when the system re-boots. The client is always started minimised in this case.

Show start process
Check this checkbox if you want more detailed information to be shown on the screen when Auerswald PBX Call Assist 2 starts.

6.1.1.2 *Show speech bubble for*

If at least one of this settings are active a speech bubble will show you the according information near the windows taskbar.

- Missed calls
  Display of all unanswered calls
- Unread E-Mails
  Display of new e-mails in the in-box
- Chats
  Display of unanswered chats
- Challenge-Response
  Display of open Challenge-Responses

6.1.1.3 *Advanced*

- Open Contacts by default for editing
  Contacts are normally opened for display in Auerswald PBX Call Assist 2.
  Alternatively, you can set-up the contacts to be always open for editing. By

keeping the CONTROL key pressed down, you can switch to the operation not selected by default when clicking on a contact.

- **Commit contact detail tabs last selected to memory**
  With this function, you will open the contact detail window always with in the same tab. If you close the contact detail window in the tab "Unprocessed", the page "Unprocessed" will automatically appear when you next open a contact.
- **Register as standard-telephony application**
  Here you can control whether Auerswald PBX Call Assist 2 should automatically register itself automatically at start as a standard-telephony application. The standard-telephony application takes on telephone dialing requests on the TAPI level and diverts this to the telephone or telephone system.
- **Play notification sounds**
  Notification sounds of Auerswald PBX Call Assist 2 will be configured through the audio scheme of Microsoft® Windows®. You can switch off notification sounds altogether here and open the relevant Windows® settings page.

6.1.2   Action filter

Action filters are rules which describe events more exactly and which allow you to therefore explain actions only in certain cases. The action is executed only if *all* given rules apply.

Set the check mark to use filter in order to create a filter. Remove the check if you want to disable an already defined filter, however it is not deleted immediately.

Click on the button Add... and choose the field name whose field value should fulfil a condition. Here you are offered every action fields.

After you have chosen the field name, enter the rule in the column Regular expression which the field value must fulfil.

6.1.2.1   Regular expressions

A brief overview of the permitted expressions:

Character	Description
^	The beginning of the string. With the Caret at the beginning of the regular expression, it is determined that the field value must agree from the outset. The expression "^0 " means that the field value must begin with "0 ".
^	The caret (^) directly after the left bracket ([) has another meaning. It is used to exclude the other signs within the bracket. The expression "[^0-4] " permits only figures except 0 to 4.
$	The dollar character ($) calls the end of the string. The expression "152$ " is valid only for strings which end with "152".
|	The sign (|) permits both characters between it. The expression "8|9 " permits "8 " or "9 ".
.	The point (.) permits every character (or every figure).

*	The Star (*) indicates, that the character to the left must exist 0 times or more.
+	The Plus (*) is similar to the Star, only that the character to the left must exist at least 1 time.
?	The question mark (?) indicates, that the character to the left must exist 0 or 1 time.
[]	The corner brackets ([and]) indicate the amount of characters that are permitted at this point.
\	The Backslash is used as an Escape sequence. If you want to search for "+", you must write "\+".
➡	Tip: The Caret sign (^) can be found on the top left of a German keyboard.

6.1.2.2 Check filter

You can check your input immediately here. Enter a value as an example in the field of the same name. The example value is applied to all regular expressions. The symbols beside the field name indicate whether the example value on the regular expression fits.

- ▪ 🔵 The blue symbol indicates that either no example value was entered, or that the entered example value does not fit on the regular expression.
- ▪ 🟢 The green symbol indicates that the entered example value on the regular expression fits.
- ▪ 🔴 The red symbol indicates that the regular expression is not valid. In this case correct the regular expression.

6.1.2.3 Examples

Effect	Actions field	Regular expression
Complete only with internal calls	<Call.Internal>	1
Complete only with external calls	<Call.Internal>	0
Complete only with calls from Germany	<Call.NumberSC>	^\+49
Complete only with calls from Germany or Switzerland	<Call.NumberSC>	^\+49|^\+41
Complete with calls, in which no contact was found	<Call.ContactEntryID>	^$
Execute only with contacts of the company "estos GmbH "	<Contact.Company>	^estos GmbH$

Complete only with high priority appointments	\<Appointment.Importance\>	2
Run only for appointments that start at 9 clock (german date format)	\<Appointment.StartTime\>	09:00
Run only if appointments start at 9 o'clock (American date format)	\<Appointment.StartTime\>	9:00:00 AM

➡ Please note that in certain events not all fields can be used. Thus no appointment fields are available, e.g. for telephony events. An entire overview of all fields, as well as which fields are available with which events, can be found in the section action fields.

➡ Action fields that represent a timestamp, such as \<Appointment.StartTime\> use the date format configured for the local computer. This corresponds to the display of dates, as Auerswald PBX Call Assist 2 displays them in the log view in the Date column. For example, "Mo 02.07.2012 15:10:25" (Germany) or "Mon 7/2/2012 3:10:25 PM" (USA). The Date column can be added to the column headers on the Journal tab page by right-clicking the column header with the mouse.

6.1.3 Action fields

While editing User-defined actions in Auerswald PBX Call Assist 2 you can use placeholders which were replaced when the action is executed with actual data (e.g. the phone number of the participant in the discussion will be filled in). These placeholders can also be used for action filters.

The Action fields can be divided into three different groups:

- Telephony-Action fields
- Contact-Action fields
- Appointment-Action fields

6.1.3.1 Telephony-Action fields

Field name	Description
\<Call.NumberSC\>	The phone number in supercanonical format (e.g. +49301234567)
\<Call.ContactEntryID\>	The database or Outlook® EntryID of the contact, if one was found.
\<Call.ContactEntryIDStore\>	The database or Outlook® EntryID of the Messagestore in which the contact was found
\<Call.ContactEntryIDDB\>	The database identifier of the database in which the contact was found.
\<Call.ContactName\>	The display name of the contact, if a contact was found for the phone call.

<Call.Origin>	The direction of the phone call: 1 for "outgoing", all other values mean "incoming".
<Call.Internal>	Indicates whether the call is internal or external: "1" for internal, "0" for external.
<Call.Private>	Indicates whether the call is marked as private: "1" with private calls.
<Call.ProjectName>	The project name, if the telephone call is assigned to a project.
<Call.ProjectPIN>	The project PIN, if the telephone call is assigned to a project.
<Call.Note>	Contains the call memo.
<Call.MSN>	Own extension number.
<Call.MSNSC>	Own extension number in canonical format.
<Call.MSNName>	Name found for the own extension number.
<Call.RedirectingSC>	The forwarding phone number in canonical format.
<Call.RedirectingName>	The name of the contact who forwarded the call.
<Call.HoldNumberSC>	The number of the contact that is being on hold.
<Call.CreatedTime>	The time at which the call has been created on the server.
<Call.ConnectedTime>	The time at which the call was accepted.
<Call.DisconnectedTime>	The time at which the call has been terminated.

6.1.3.2   Contact-Action fields

Field name	Description
<Contact.DatabaseName>	Readable name of the database which the contact comes from.
<Contact.EntryID>	The database or Outlook® EntryID of contact.
<Contact.EntryIDStore>	The database or Outlook® EntryID of the messagestore, in which the contact was stored

<Contact.EntryIDDB>	The Database identifier of the database, in which the contact is stored
<Contact.CtiServerUserName>	The CTI username if it is a CTI user
<Contact.DisplayName>	The contact's display name.
<Contact.FirstName>	The contact's first name.
<Contact.LastName>	The contact's last name.
<Contact.JobTitle>	The contact's job title.
<Contact.Company>	The contact's company name.
<Contact.Department>	The contact's department.
<Contact.OfficeRoomNumber>	The contact's office number.
<Contact.CustomerID>	The contact's customer number.
<Contact.BusinessAddressStreet>	The street of the contact's company address.
<Contact.BusinessAddressPostalCode>	The Post code (zip code) of the contact's company address.
<Contact.BusinessAddressCity>	The town/city of the contact's company address.
<Contact.BusinessAddressState>	The province/state of the contact's company address.
<Contact.BusinessAddressCountry>	The country of the contact's company address.
<Contact.PrivateAddressStreet>	The street of the contact's private address.
<Contact.PrivateAddressPostalCode>	The Post code (zip code) of the contact's private address.
<Contact.PrivateAddressCity>	The town/city of the contact's private address.
<Contact.PrivateAddressState>	The province/state of the contact's private address.
<Contact.PrivateAddressCountry>	The country of the contact's private address.
<Contact.OtherAddressStreet>	The street of the additional contact's address.
<Contact.OtherAddressPostalCode>	The post code (zip code) of the additional contact's

	address.
<Contact.OtherAddressCity>	The town/city of the additional contact's address.
<Contact.OtherAddressState>	The province/state of the additional contact's address.
<Contact.OtherAddressCountry>	The country of the additional contact's address.
<Contact.EMail>	The contact's first e-mail address.
<Contact.EMail2>	The contact's second e-mail address.
<Contact.EMail3>	The contact's third e-mail address.
<Contact.SIPAddress>	The contact's SIP-Address (or instant messaging address).
<Contact.WebPageURL>	The contact's Web-Address.
<Contact.PhoneBusiness>	The contact's first business phone number.
<Contact.PhoneBusiness2>	The contact's second business phone number.
<Contact.CompanyMainTelephoneNumber>	The contact's company phone number.
<Contact.AssistantTelephoneNumber>	The contact's assistance phone number.l
<Contact.PhoneHome>	The contact's first private phone number.
<Contact.PhoneHome2>	The contact's second private phone number.
<Contact.PrimaryTelephoneNumber>	The contact's primary phone number.
<Contact.PhoneMobile>	The contact's mobile/cell phone number.
<Contact.CarTelephoneNumber>	The contact's car telephone number.
<Contact.RadioTelephoneNumber>	The contact's radio phone number.
<Contact.PagerTelephoneNumber>	The contact's pager phone number.
<Contact.OtherTelephoneNumber>	The contact's additional phone numbers.
<Contact.CallbackTelephoneNumber>	The contact's callback phone number.
<Contact.ISDNTelephoneNumber>	The contact's ISDN phone number.

<Contact.TTYTTDTelephoneNumber>	The contact's hearing impaired phone number.
<Contact.FaxBusiness>	The contact's business Fax number.
<Contact.FaxHome>	The contact's private Fax number.
<Contact.Body>	The contact's memo text
<Contact.IsPrivateContact>	Indicates whether it is an private or business contact.
<Contact.IsCtiServerUser>	Indicates whether it is a CTI-user.
<Contact.DirectWebLink>	The contact's Web application link for web-based CRM systems.
<Contact.Custom0> - <Contact.Custom19>	Contents of the custom contact fields "Custom0" to "Custom19".

6.1.3.3 Appointment-Action fields

Field name	Description
<Appointment.EntryID>	The database or Outlook® EntryID of the appointment.
<Appointment.OwnerName>	The owner of the appointment.
<Appointment.DataSource>	The database identifier of the database, in which the appointment is stored.
<Appointment.StartTime>	The date and time the appointment starts.
<Appointment.EndTime>	The date and time the appointment ends.
<Appointment.Duration>	The duration of the appointment.
<Appointment.Subject>	The subject of the appointment.
<Appointment.Body>	The memo text of the appointment.
<Appointment.AllDay>	Indicates whether it is an all-day appointment.
<Appointment.Status>	Indicates the status of the appointment.
<Appointment.Category>	The category of the appointment.

<Appointment.Importance>	The level of importance of the appointment.
<Appointment.Sensitivity>	The level of confidentiality of the appointment.

6.1.3.4   Event dependend

Depending on the event, for which a User defined action or a Actionsfilter is created, different Action fields can be used:

Event	Available Action fields
On incoming call On outgoing call At the end of a call When call is answered When the remote call party changes	Telephony-Action fields Contact-Action fields
In case of an appointment (busy) In case of appointment (out of office)	Appointment-Action fields
Automatically opened contact detail window	Contact-Action fields
After xx minutes idling When computer is locked	-

6.1.4   User-defined actions

User-defined actions serve to implement programmes with certain phone call actions. Some information can be transferred at the start of the programme as a command line. In most cases it will concern applications developed yourself which carry out additional functions, e.g. when a phone call is signalled.

All configured actions are displayed in the list. You can add new actions and edit or delete existing ones.

Action name
Allocate a name here, which is indicated. This name is for your information only and is recorded on the list of available actions on the settings page Behavior.

Application
Give the path for the application which you want to complete here. You can also specify the document to be opened. In addition, specific field names which are replaced at Program start with the corresponding values of the phone call, contact or appointment, can be entered here. You can find an overview in the section action fields.

Command line
Give here which command line of the program should be transferred. As with the application line, the given fields which are replaced by Program start with the

corresponding values of the phone call, contact or appointment, can be used here. You can find an overview in the section action fields.

Directory
The list in use should be begun.

Mode
Here you can state how the program should start (maximised, minimised, normal or hidden). Not every program evaluates this parameter!

Example:
It should be a user-defined action which opens the homepage of the caller automatically.

216. Give the action a descriptive name, e.g. "web page open".
217. Enter in the application line, the entire path to your Internet browser, e.g."C:\programFiles (x86)\Mozilla Firefox\firefox.exe".
218. As a parameter, the browser expects the URL of the Internet site to be opened. The URL is restored by Auerswald PBX Call Assist 2 in the contact-action field "WebPageURL ". Enter in the command line of the field names "< Contact. WebPageURL>" or click on "field add" and select the entry of the same name from the list.
219. You do not have to state the compete list. Simply leave the line "list" free.
220. Because the browser with the homepage should be indicated, set the mode to "Normal start".

6.1.5   Hotkeys

The term hotkey describes the option of defining system-wide key combinations which permit phone numbers to be dialed or calls to be ended (hang up) out of almost all programs. You define the key combination in this settings dialog.

Dial selected phone number, otherwise start Contact Search.
To dial a number with the shortcut key, the number has to be selected with mouse in the according window, then press the shortcut key. If there is no phone number selected, Auerswald PBX Call Assist 2 tries to search for a contact instead.

ⓘ   You can use the hotkey in Outlook® itself. You can thus dial any phone number in a contact by marking the phone number. Use the hotkey also to transfer a contact to the phone status window. You can also start callback from the journal with the hotkey.

⚠   Dialing from a console application (DOS window):
If the phone number cannot be selected directly by the mouse, then first activate the DOS Console's Editing Mode using [ALT]+[Spacebar].

Use this hotkey also for accepting a call
If this option is selected, incoming calls can be answered with the same hotkey as is used for dialing (if your phone supports this feature).

Shortcut key for hanging up
Here you can define the hotkey for ending the active connection. Type in the key combination (special keys such as Alt, CTRL and Shift are also possible). You delete the hotkey with the Del key.

Display main window
This Hotkey brings the main window of Auerswald PBX Call Assist 2 on screen and you can immediatly start searching contacts.

ⓘ	These hotkeys are configured system wide, so no other application can use the same key combinations for other actions.
⚠	Dialing with the hotkey uses the Windows® clipboard and the keyboard shortcut [CTRL+C]. The contents of the clipboard can be changed at the same time and the shortcut [CTRL+C] not used as a hotkey. Consider these restrictions with the use of this function.
⚠	Phone numbers or contacts cannot be dialed (or searched) from applications that have been started with higher administration rights than Auerswald PBX Call Assist 2. If the hotkey has been pressed in such an application, an information dialog will provide a reminder. Auerswald PBX Call Assist 2 can only display this reminder if the hotkey is used in combination with or (a Windows® restriction).

6.1.6   Shortcuts

To increase productivity, certain application features can be assigned to key shortcuts. Thereby, certain tasks and features can be started, opened or executed using a simple shortcut.

The list contains all available features, sorted by units, that can be assigned to shortcuts.

Assign a shortcut to a feature:
Click on the second column so that a text entry cursor will appear. Then simply press the desired key combination.

Delete a shortcut:
The Delete button can be used for this purpose. If you are currently in the process of assigning a new key, simply press [Del].

Reset all shortcuts to their default values:
The two buttons "Reset" and "Reset All" are available for this purpose.

ⓘ	The shortcuts for features that have been grayed out cannot be modified. This can be because of the following reasons: 221. The shortcuts may have been assigned by the manufacturer. 222. The shortcut has been assigned by the System Administrator using group policies.
⚠	If a conflict is discovered between the choosen hotkey and a hotkey from another application, an alternative hotkey should be choosen, or remove the other hotkey from the other application first.

6.1.7 Advanced

Display all messages
Auerswald PBX Call Assist 2 often uses message windows which you can automatically suppress for future similar cases with the "Do not show again" option. Use this function to re-display all message windows which would otherwise not be opened again.

Reset layout
Click here to reset the current layout of the client to default. This implies restoring the default column widths in the tabs (e.g. journal, planned calls etc.) and a reordering of all tabs in the main window. Contacts saved are still remain.

6.1.8 Dialog adaptation with Templates

Auerswald PBX Call Assist 2 uses XSLT templates to display XML data as HTML pages. The XSLT templates are in the *Templates* or *Templates/default* folder.

Directory	Deployment
templates	You should save files you have changed in this directory if you wish to change one of the files supplied in templates/default.
templates/default	Configuration files which were installed with the product. These are overwritten if the product is updated.

XSLT processor
Auerswald PBX Call Assist 2 provides the files in XML format. These XML files are processed into an HTML page with the help of an XSLT template and an XSLT processor. Sablotron or Microsoft® XML Parser are used as XSLT processors.

Development of own templates
You can develop and use your own templates. You should familiarise yourself with XSLT syntax for this. You can find help on the subject at http://www.w3schools.com/xsl/ or the Microsoft® MSDN pages.

If you wish to use templates you have developed by yourself these should be stored in the *template* directory. Your changes will then not be lost if an product update is installed.

Template	Deployment
common.xslt	Provides different template functions for e-mail and web links and for transcoding sets of characters
unanswered.xslt	E-mail messages regarding unanswered calls. More precise details can be found in the Auerswald PBX Call Assist 2 UCServer help file.
contact.xslt	Overview page in the Contact details window.

RemoteContact.xslt	Is used in the Call window to prepare the details for the current dialog partner. The template defines which contact details are displayed.
HoldContact.xslt	Is used in the Call window to prepare the details for a dialog partner on hold. The held dialog partner is displayed if a further Auerswald PBX Call Assist 2 user is holding a participant and calls you. The template defines which contact details are displayed.
LocalContact.xslt	Is used in the Call window to prepare the details for a called contact. The called contact is displayed if a contact for an incoming call to the phone number is found. You must activate the hotline service in the settings for Incoming calls for this. The template defines which contact details are displayed.
RedirectedContact.xslt	Is used in the Call window to prepare the contact details for a redirected call. You are shown the contact for whom the call was last signalled. The template defines which contact details are displayed.

⚠ When changing the templates, please keep in mind that the *common.xslt* must always be in the same directory as the template using the *common.xslt*.

6.1.9 Function control via Windows® Registry

All necessary settings which are saved in the Windows® registry can be changed in the Auerswald PBX Call Assist 2 user interface. You can, nevertheless, also activate or deactivate special functions in Auerswald PBX Call Assist 2 by means of certain keys.

⚠ Please note that the functions mentioned here only make sense in exceptional cases and their use is not generally recommended.

All the following listed registry values are expected in the HKEY_CURRENT_USER\Software\estos\UCServer4\CtiMain key. The registry value must be created below this key to enable the relevant function in Auerswald PBX Call Assist 2.

Registry entry	Type	Meaning
JournalAutoCreateFlags	DWORD	With this registry entry you can control whether Auerswald PBX Call Assist 2 generally automatically creates a journal entry in Outlook® for all incoming and/or outgoing calls. Set the DWORD value to "1" to always automatically create an Outlook® journal entry for all incoming calls. With value "2", all outgoing calls are always included. Set the value to "3" to log all calls in Outlook®.
EnableOutlook®	DWORD	Use these two registry values if Auerswald PBX Call Assist 2 is to

EnableMAPI		use neither Outlook® nor MAPI. To switch off the connection to Outlook® or to not use MAPI, set both DWORD values to "0". These registry entries have no effect if you do not have Outlook® installed or if no MAPI is available in the system. Please also note that these values have no effect on the Outlook® plug-in.
EnableTobit®	DWORD	Use this registry value if Auerswald PBX Call Assist 2 should not use a Tobit® David Infocenter which is installed on the computer. Set the DWORD value to "0" to switch off the connection to the InfoCenter. This key has no effect if you do not have an InfoCenter installed.
EnableLotusNotes	DWORD	Use this registry value if Auerswald PBX Call Assist 2 should not use IBM Notes® which is installed on the computer. Set the DWORD value to "0" to switch off the connection to IBM Notes®. This registry entry has no effect if you do not have IBM Notes® installed.
HeroldAPILicenseName HeroldAPIKey	String	Enter your Herold-API-Licence name or your Herold-API-Key here, if you want to give the licence name API and API-Key administratively. If so, the user cannot enter the licence name API and API-Key into the user interface. The Registry data can be also rolled out by group guidelines.
HotkeyDelay HotkeyTimeout	DWORD	Is a dialing of a phonenumber via Hotkey not working, so you can try to set a longer delay time, so the other applications have more time to put the selected text into the clipboard. For this the following keys are available: ▪ HotkeyDelay = Waiting period in milliseconds until a new attempt will be started ▪ HotkeyTimeout = Timout in milliseconds until the hotkey selection will be cancelled.

6.2   Telephony

In Telephony you can customize the call window to your needs, choose settings for incoming, outgoing, unprocessed and planned calls and also define projects. Additionally you can configure your Bluetooth connection here.

- Conversation window
- Incoming calls
- Outgoing calls

6.2.1   Conversation window

Display automatically for incoming calls
Display automaticaly for outgoing calls
You can define whether you wish the call window to be displayed for incoming or outgoing calls. If the window is not displayed automatically you can display it at any time during the call via the Auerswald PBX Call Assist 2 task bar.

Always display active calls as the topmost window
You should activate this option if you wish to always display active calls as the topmost window. If the window is automatically displayed, it is normally displayed as the topmost window for an incoming or outgoing call but can then subsequently be covered by other windows. You can bring all curent calls into the foreground via the tray icon at any time.

Transparency, support display and fading out
The call window supports transparency and is normally faded in and out. If you do not wish to use this function you should deactivate the transparency.

Window position
You can define the position as to where the call window opened by Auerswald PBX Call Assist 2. Call windows for prepared calls are excluded. These windows are always opened at the current position of the mouse.

- Default position (task bar icon)
  PBX Call Assist 2 opens the conversation window at an appropriate location on the screen. Other, already open windows of PBX Call Assist 2 are not overlaid.
- Remember last position
  The conversation window appears again at the same position where you have closed it the last time or where it was automatically hidden.
- Define position using preview
  Open a call window with the preview button and place it where windows should open it in future. Moving the conversation window during a call has no effect on the display position.

6.2.2   Incoming calls

Support for Hotline-Services (client function)
The hotline service analyses the number called for incoming calls (multi-entity capability). Analysis of the number called can be used to differentiate between various companies if you have to announce yourself differently depending on the number called (e.g. for a secretarial service).

Activate the option Display called contact, so that the contact information is displayed in the Call window of an incoming phone call. What information should be displayed can be defined via a template.

6.2.3 Outgoing calls

Automatic redialing
If an outgoing call does not go through because the line is busy, you can start automatic redialing in the call window. You can define how often the system will try to connect the call and at which intervals. Automatic redialing is terminated as soon as the line is no longer busy or the set number of attempted calls has been reached.

Suppression of caller ID
You can activate the suppression of caller ID for outgoing calls if this is supported by your telephone system. You may activate caller ID suppression for all outgoing calls or choose case by case whether you wish to suppress caller ID. If you wish to suppress caller ID in individual cases only, an additional button for activating or deactivating this option appears in the call window. Please keep in mind that this option must be activated before you start the call so that the caller ID can be suppressed.

6.2.4 Planned calls

With planned calls, you can have yourself reminded at a specified time of calls to be made or plan upcoming calls in advance. Planned calls appear in the main window on the tab of the same name.

Auerswald PBX Call Assist 2 offers you two options for managing planned calls:

Auerswald PBX Call Assist 2

- Administration with Auerswald PBX Call Assist 2 UCServer (recommended): Planned calls are only saved in Auerswald PBX Call Assist 2 UCServer and can be added and changed in the Auerswald PBX Call Assist 2 UCServer editor.
- Management with Outlook®
  Planned calls are saved exclusively in Outlook® and can only be saved with the Outlook® editor. Please note that the possibilities for subsequent alterations to the phone number and the linked contact are limited as only Outlook® contacts can be subsequently linked.

6.2.5 Projects

Auerswald PBX Call Assist 2 helps the user assign calls to previously defined projects. This feature is also available from the Journal as well as the telephone system itself. The project identifier should be selected from the server through the system as would be appropriate for the project settings. Making private calls through so-called calling card providers is the exception to this. If a call is marked as private, the call through the telephone system can be configured using the identifying numbers.

If the Mark private calls option is activated a call can be marked, for example, as private in the call window.

🔒 To prevent others seeing private numbers or callers they can be marked as private. Any call information is not visible to others in the journal.

Prerequisite: Auerswald PBX Call Assist 2 UCServer is set to not save phone numbers. See also Telephone Journal in the Auerswald PBX Call Assist 2 UCServer help file.

➡ If private conversations are not allowed in the company, having the administrator deactivate this option in Auerswald PBX Call Assist 2 UCServer or in the group policies is reasonable.

Use projects and code numbers
In Auerswald PBX Call Assist 2, projects are predominantly configured for the journal. In addition, specifics PINs and calling card providers can be defined for private conversations. If the project has been defined as a private call then the PIN will be used for the call and it will not logged in the journal.

The following rules apply:

Character	Deployment
0-9 * #	Digits which are dialed normally
C	Here you wait for the remote station to accept the call.
e, E	Place-holder for entering a PIN. With E, the number of digits for entry is not important. With e, the number of digits is defined by the number of letters (eee for three digits).
u, U	Space for the input of a user ID. With 'U' the number of digits input is not important. With 'u' the number of digits is defined over the number of the letters ('uuu' for three digits).
p, P	Dialing pause: 'p' for 0.5 seconds, 'P' for 1 second.
N	Space for the number to be chosen. If the space is not set, the number is automatically transferred to the end.
J	Defines, if available, that the user login and pin number entered by the user is noted in the journal.
X	If available, the phone number should be dialed with an external prefix. If 'X' is absent the phone number is dialed in national format (03012345678).

In the user interface configured projects are visualised centrally and locally with differently coloured Icons:

📌 Projects configured in Auerswald PBX Call Assist 2 UCServer.

📌 Project for the journal

📌 Project for dialing

📌 Project for dialing and for the journal

🔒 Project configured in Auerswald PBX Call Assist 2 UCServer which is processed as a private call

📌 Projects configured in Auerswald PBX Call Assist 2:

📌 Project for the journal

🔒 Project configured in P Auerswald PBX Call Assist 2 which is processed as a private call

6.2.6 Bluetooth

Support for Bluetooth Cell Phones
Cell phones can be connected with the PC using Bluetooth. This connection will make controlling and monitoring of the telephone possible. The telephone must support the Bluetooth handsfree profile. This is also be used with a speaker phone in the car.

All cell phones that have been connected with the PC can be automatically used. Alternatively, only those telephones that are desired for use can be selected from the list of connected devices.

Connect New Devices with the PC (Bluetooth pairing)
The cell phone must be connected with the PC (Bluetooth pairing) in order to be able to use it.

Phonebook
The Phonebook of the mobilephone/cellphone can be optionally integrated.

Offline journal
If the Bluetooth connection will be interrupted and available at a later moment, all calls will be synchronized. Please note that such calls have no duration at the journal.

6.3 Search

In Search you can control the search behavior of Auerswald PBX Call Assist 2, in particular by selecting which data sources and search-parameters should be used in the detail search.

- Data sources

6.3.1 Data sources

The data source settings contain the list of all contact data sources which are to be used when searching for contact definition. Auerswald PBX Call Assist 2 automatically inserts the data sources for Auerswald PBX Call Assist 2 users, the lines, the Auerswald PBX Call Assist 2 favorites and the estos MetaDirectory centrally configured in Auerswald PBX Call Assist 2 UCServer. Also data sources which are administratively defaulted by group guidelines are automatically entered.

Using the data source Auerswald PBX Call Assist 2 favorites you can search all contacts in your favorites and thus find quickly.

In addition, your personal inbox is imported from Outlook® when Auerswald PBX Call Assist 2 is started if you have Outlook® installed on your computer and have not specified any other folders.

6.3.1.1 General settings

The search behavior can be set for each data source in the list. The general settings can be changed directly in the overview list or by clicking the Edit button on the General tab.

- Use in search filter "All"
  If this option is selected for a data source the data source is searched if the "All" filter is selected in the search field.
- Search on incoming call
  For every call, Auerswald PBX Call Assist 2 automatically searches data sources for the phone number in order to find the call partner. You can define here which data sources are to be used for this. It is recommended that especially slow data sources are not searched when contact search.
- Use if tenant function
  In addition to the phone number search to find out the call participant, PBX Call Assist 2 can also search a contact, the client, for the phone number on your own telephone. This function is useful, e.g. for hotline services, and you should only activate it if the data source contains client contacts and you want to show the client contact, e.g., in the call window. Please note that the tenant function can not be used for the data source "Auerswald PBX Call Assist 2 user" as well as for phonebook data sources.
- Treat as unpersonalized data source
  As well as your personal contact data sources you can also use Auerswald PBX Call Assist 2 with unpersonalized data sources (mainly phone books). However, the search of phone books only makes sense if there is no contact in your personal contact data sources which corresponds to the search criteria. Activate this setting if the data source should only be searched when no contact is found in the personal data sources already searched. Phone book data sources are a typical application case.

6.3.1.2 Data source search sequence:

Auerswald PBX Call Assist 2 permits you to define the order in which the data sources are searched. The topmost data source in the list is always processed first. Click the Move up button to move the selected data source up one place. Similarly, use the Move down button to move the selected data source one place lower down in the list. Please note that all data sources with the Treat as phone book option are always searched at the end and therefore must always be at the bottom of the list.

6.3.1.3 Adding data sources

New data sources can be linked at any time in Auerswald PBX Call Assist 2. For this, click the Add button and select the data source option.

- Outlook®
  Click here to add an Outlook® mailbox or a specific Outlook® contact folder to the search list. Please note that you can only select mailboxes or contact folders in the

selection dialog. If you add a mailbox this is automatically configured so that all subordinate contact folders are also used in the search. Subordinate folders are not, however, included for added contact folders. This behavior can be altered at any time with Edit.

- ▪ Add phone book
  Auerswald PBX Call Assist 2 offers you the option of adding phone books installed locally on your computer. Although Auerswald PBX Call Assist 2 automatically recognises locally installed phone books it may be necessary to specify the installation manually. With installation of the "DasTelefonbuch Deutschland" or "Herold" please manually configure the installation path of the product, with the installation of "TwixTel" the path must be always given to the data CD.

  You can also integrate phone books into Auerswald PBX Call Assist 2 which are not installed locally but centrally. For this, you must configure the phone book in the estos MetaDirectory and connect the estos MetaDirectory as a phone book.

- ▪ Add MetaDirectory or LDAP data source
  You can integrate both a estos MetaDirectory and normal LDAP data sources into Auerswald PBX Call Assist 2 with the help of the database wizard. Field allocation is automatic in the case of estos MetaDirectory.

6.3.1.4 Editing data sources

Specific data source properties can be viewed or modified via the Editbutton. Alternatively you can double-click a data source list entry.

- ▪ Adjust favorite data source
  In the event that a company name has not been explicitly provided by the federation participant, check the Fill empty company names from the presence domain entries for federation contacts checkbox, to find Federation contacts based on company name when searching Favorites. When checked, the presence domain will be interpreted as the company name for federation contacts.

- ▪ Edit Outlook® folders
  Select theInclude all sub-folders when searching option on the Advanced tab if all subordinate contact folders should be searched in addition to the folder itself.

  On the Name search tab you can specify a list of fields which should be additionally included in name searches in Outlook® folders. The Last name, First name and Company fields are already searched by default. Please note that the name search fields apply globally for all Outlook® folders.

  Example:
  Click <Add field here> and select the Item.Department entry from the list. The subsequent name search will then find all Outlook® contacts which match the search criterion in the Department field.

- ▪ Edit phone book
  Here you can query the installation path and the current status and, if necessary, information about the connected phone book. Please note that the installation path can only be changed if you remove and re-attach the current phone book.

- ▪ Edit MetaDirectoryor LDAP data source
  On the Advanced tab, information can be retrieved about the selected data source or configuration of the data source. The database wizard assists with this. Please note that a centrally configured estos MetaDirectory can only be changed in Auerswald PBX Call Assist 2 UCServer and not in Auerswald PBX Call Assist 2.

Please note that with data sources that are administratively defaulted by group guidelines, the configuration cannot be edited by the User.

6.3.1.5 Deleting data sources

Click the Delete button to remove a data source. Please note that some data sources cannot be removed. These include the Auerswald PBX Call Assist 2 users, Auerswald PBX Call Assist 2 UCServer's lines, the Auerswald PBX Call Assist 2 favorites and the estos MetaDirectory centrally configured on Auerswald PBX Call Assist 2 UCServer. Also data sources cannot be deleted which are administratively defaulted by group guidelines.

> ➡ If a data source could not be integrated this is indicated by an exclamation mark in the data source icon. An error description is displayed in the tooltip if you place a mouse pointer over the data source icon.

6.3.2 Journal

Auerswald PBX Call Assist 2 uses a journal provided by the server. All conversations and calls will always be stored on Auerswald PBX Call Assist 2 UCServer irrespective of these settings. Specifically, Auerswald PBX Call Assist 2 enables you to copy journal entries also into Outlook® or IBM Notes®.

Select data source:
If you use both Outlook® and IBM Notes®, you may selected your preferred system as a data source.

Setup journal file
Auerswald PBX Call Assist 2 always lays out the journal copies in the set journal folder. If another journal folder should be used, this can be changed here with the "Search" button. Please note that only the journal folder can be selected in the choice dialog. Select "default" to activate the default-journal folder.

Create automatic journal copies
In addition to the option of placing a copy of a journal entry in Outlook® or IBM Notes® manually via the context menu, Auerswald PBX Call Assist 2 can also prepare automated journal entries of telephone calls in Outlook® or IBM Notes®:

- For a call memo
  Activate this option, and Auerswald PBX Call Assist 2 will always store a journal copy in Outlook® or IBM Notes® as soon as you enter a memo about the call in the call window while you speak.
- Contact from own mailbox
  Activate this option and Auerswald PBX Call Assist 2 will always store a journal copy in Outlook® or IBM Notes® as soon as a contact from one of your personal contact files was assigned to the call.

> ⭐ Use the Journal browser for a more detailed call journal.

> ➡ Since Auerswald PBX Call Assist 2 keeps a journal provided by the server, journal entries for every call in Outlook® or IBM Notes® are not necessary. This saves unnecessary objects and ensures lasting

high-quality performance of Outlook® and IBM Notes®, respectively.

➡ You can see an overview of your last calls in the Auerswald PBX Call Assist 2 main window if you click the Journal tab.

➡ For special requirements, it may be necessary to save all calls as journal entries in Outlook® or IBM Notes®. This service can be activated in the Windows® registry. Details can be found at Control functions via Windows® Registry. Please note that activation of this function is not recommended!

6.4 Collaboration

In Colaboration the behavior of the client regarding chat from other Auerswald PBX Call Assist 2 users and notifications of presence changes of contacts are described.

- Chat
- Notification window

6.4.1 Chat

Do not display status reports
If you activate this option, no status reports on the chat and your callers will be shown.

Display time without user interaction
If you didnt respond to a new chat, the chat window will be faded out after a specific time and a new chat will be added to the speech bubble info window. As soon as you respond to a chat message, the window will not be faded out automatically any more.

Transparency, support display and fading out
The chat window supports transparency and is generally faded in and out. If you do not wish to use this function, deactivate transparency.

Window position
You can determine where a message window opened by Auerswald PBX Call Assist 2 should be displayed.

- Default position (task bar icon)
  PBX Call Assist 2 opens the chat window to a suitable location on the screen. Other, already opened windows of PBX Call Assist 2 are not superimposed.
- Remember last position
  If you close a message window, the position is stored and displays new windows there.
- Define position using preview
  Open a chat window with the button "Preview" and place this at the position where future windows are to be opened. As soon as you close the window, the position will be stored.
- At mouse position
  The mouse cursor will be used as a reference position, so that the window will always appear in the immediate vicinity of the window(s) being used for work.

⚠ These settings do not apply for chats that have been started by the user. In this case, the message

window will always be opened at the mouse position.

6.4.2   Notification window

Notification windows can draw the user's attention to certain presence changes of contacts in Favorites. These appear for specially selected user then a small notification window, in the short type of change is indicated and which contact is concerned.

Notification in case of the following event:

- Contact becomes available.
  The notification window appears when a tagged contact logs on, switches from the status "Inactive" to "Available" or switches from "Absent" to "Available".
- Contact signs out.
  The notification window indicates when a tagged contact signs out.
- Contact has a call to pick up.
  The notification window appears when a call rings for the tagged contact while the tagged contact is not "available", but contact permits picking the call.

Display duration
The notification window will fade out after a certain time. With this setting, you can define the time period yourself.

Transparency, support display and fading out
The notification window supporty transparency and generally fades in and out. If you do not wish to use this function, deactivate transparency.

Window position
The position can be defined where a notification window opened by Auerswald PBX Call Assist 2 should be shown.

- Default position (task bar icon)
  Auerswald PBX Call Assist 2 will open a new window at a apropriate position on the screen. Other already open windows of Auerswald PBX Call Assist 2 will not be overlaped.
- Remember last position
  A notification window will appear at the same position where you have closed it or it was automatically hidden.
- Define position using preview
  Open a notification window with the button "Preview" and position it where future windows are to be opened.Moving the message box has no effect on the display position.

7 Info about Auerswald PBX Call Assist 2

Auerswald PBX Call Assist 2 is a product of Auerswald GmbH.

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For product updates visit http://www.auerswald.de

Frequently asked questions and answers and also support are available at http://www.auerswald.de

Support via e-mail is available from info@auerswald.de

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