Strata®

CIX™

Net Phone
Administrator Guide

Publication Information

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Introduction

This user guide describes how to use the Toshiba Net Phone software with Strata CIX670, CIX200, CIX100, CIX100-S, and CIX40 telephone systems:

Organization

- **Chapter 1 – Overview** provides an overview of the Net Phone Administrator screens and functions.
- **Chapter 2 – Installation** covers the Net Phone software installation.
- **Chapter 3 – Deploying Net Phone** describes three server-based configuration items plus instructions for duplicating configuration data from one Net Phone onto other Net Phones.
- **Chapter 4 – Server-based Dial Plan** shows how to set up the dial plan using the Preferences dialog box.
- **Chapter 5 – Server-based Net Phone COS** steps.
- **Chapter 6 – Open Architecture Interfaces** describes integrating applications within Net Phone, such as the Personal Power Dialer or Chat as well as provides enabling links for other programs running on the PC.
- **Appendix A – Trouble Shooting** includes the causes and solutions to various issues that could be encountered when using Net Phone.

Conventions

Conventions	Description
[DN]	Represents any Directory Number button, also known as an extension or intercom number. Telephones can have multiple extensions. Incoming calls ring extensions bottom to top.
[PDN]	Represents any Primary Directory Number button (the extension number for the telephone).
[SDN]	Represents any Secondary appearance of a PDN. A PDN which appears on another telephone is considered an SDN.
[PhDN]	Represents any Phantom Directory Number button (an additional DN).
Note	Elaborates specific items or references other information. Within some tables, general notes apply to the entire table and numbered notes apply to specific items.
Important!	*Calls attention to important instructions or information.*
Arial Bold	Represents telephone buttons.
+	shows a multiple PC keyboard or telephone button entry. Entries without spaces between them show a simultaneous entry. Example: **Delete**+**Enter**. Entries with spaces between them show a sequential entry. Example: **#** + **5**.
Tilde (~)	Means "through." Example: 350~640 Hz frequency range.
See Figure 10	Grey words within the printed text denote cross-references. In the electronic version of this document (Library CD-ROM or FYI Internet download), cross-references appear in blue hypertext.

Related Documents/Media

Note Some documents listed here may appear in different versions on electronically or in print. To find the most current version, check the version/date in the Publication Information on the back of the document's title page.

Refer to the following for more information:

• Strata CIX Net Phone User Guide.

• Strata Net Phone Help file included with the Software.

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Overview 1

This document is the System Administrator's Guide for the Net Phone. This book contains information for a system administrator to install and administer one or more installations of Net Phones. The 'System Administrator' is assumed to be a person familiar with the phone system, computers, and LANs. This document is NOT a 'User Guide' for the Net Phone user. The on-line manual and help file in Net Phone should be used in conjunction with the Administrator's Guide to provide a complete operation of Net Phone.

The Net Phone is a PC Phone software program that is used on PCs. It is a "Client" program of the Toshiba Net Server. At each PC there is no physical connection between the phone and the PC, because Net Phone uses a 'virtual' connection to control the phone (see Figure 1).
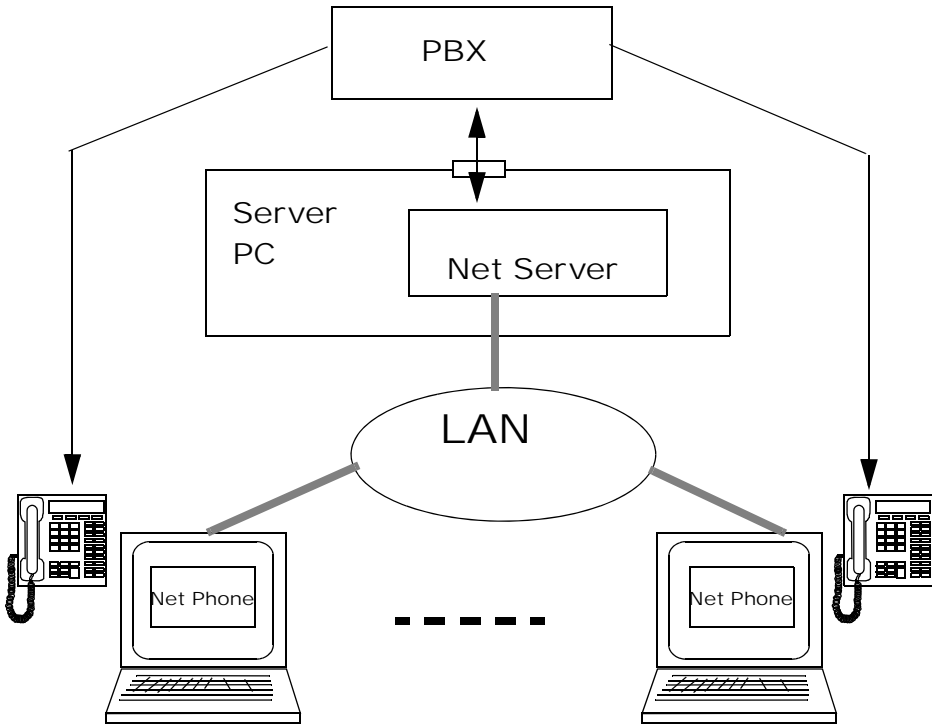
Figure 1   Installation

Starting in V5.0, two levels of software licensing is provided and controlled by the Net Server (using a software copy key) at the Server PC. No copy key or software licensing is required at the PC. Net Phone can be installed on any number of PCs, and when each PC runs its copy of Net Phone, the Net Server validates whether it has sufficient licenses to run that additional copy of Net Phone. If not, that PC will be restricted to running Net Phone in Demo mode (which will run most features but will time out after a while).

Net Phone licenses have two levels, one that controls the features for working in conjunction with a desktop phone enhancing the way that phone works while all speech is provided by the desktop phone. The second level, added beginning with

V5.0, provides a complete speech path for Voice over the Internet (VoIP) to provide a complete phone without using a desktop phone. This second interface can also work using a desktop phone or standalone by virtue of changing the "profile" settings.

This document provides a quick reference for a System Administrator for getting Net Phone installed and running. Once it is installed and operational, the On-Line Help file for Net Phone provides extensive detail on using various features.

Note All of the features mentioned in this document are not available on all types of PBXs. Please refer to your PBX documentation or contact Computer Telephony Solutions, Inc. if you need assistance.

Net Phone Software Enhancement History

Version 6.0

- Presence Viewer - Net Phone now has the Presence Viewer window that combines all the status information and communication tools with other members of the group. The Presence Viewer can provide the user with the following status of other members and initiate a call or a chat session with another user.

- Phone status – shows if the telephone is in an Idle, Busy, Do Not Disturb state.

- Status Message – shows the message status set by Net Phone such as "In Meeting", "Leave a message", "Out to Lunch" and other canned messages as well as free text created by the user.

- Chat Status – shows if the Net Phone is launched and is online to accept the chat requests.

- IP Mobility – Net Phone is compatible with IP Mobility feature which Strata CIX R5.0 or above provides. There user can switch between Net Phone VoIP and other IPT or SoftIPT using the same directory number. When switching from Net Phone VoIP to other phone, Net Phone will release the audio path while it continue to associate with the phone so that it can provide screen pop and other CTIS features that Net Phone can provide.

Version 5.1

- ACD Viewer – The Net Phone ACD Viewer allows users connected to Strata ACD to view the status of all ACD groups to which they belong. This additional functionality does not require MIS software to be installed.

Net Phone shows the operating status of each group. Group view can be expanded to see the number of calls and the status of each of the agents and supervisors in the group. Each group contains a "My Status" icon showing agent's own status in the group (logged in, logged out, busy, in wrap-up, etc.), and when you right-click on your icon you can change your status.

ACD Viewer requires Enhanced Strata ACD system.

Version 5.0

(Please note: The initial production release of this version is identified with the version number 5.0.200).

- **VoIP Audio** – Added the ability to interact with VoIP audio as a licensed option. This feature includes showing an "Audio Key" on Net Phone when the profile indicates the use of VoIP. This feature provides ringing and support for USB devices to be used with the audio stream. Also includes Plantronics wireless headset controls, called PerSonoCall, for a seamless integration using Plantronics devices.

- **Secondary Extensions** – Secondary extension support is important for people who may use a desk phone while in the office and use the VoIP capability assigned a different DN when away from his desk. The ability to answer and monitor both extensions is an important feature:

  - Handles calls for the secondary extension.

  - Supports a DSS capability

  - DND and FWD support for the secondary extension.

  - New Actions to allow DND of Secondary and Primary to be synchronized using Personal Call Handler Rules.

- **Connection Profiles** – Net Phone added the ability to define and select a user connection profile for logging into Net Server. User profiles makes it easier for mobile users to use a desk phone at times or use their IP phone at other times by

selecting the correct profile. The profile defines the Extension DN(s) for Net Phone including whether only a single DN or also a Secondary DN are monitored. It selects whether the audio is coming via VoIP or via the PBX phone and each profile can define its own "skin" appearance.

- **Docking Enhancements** – Users of "docked" configurations for Net Phone now have more capabilities that include using either the LCD window or the Calls Window for call information. It also expands the "Extra Buttons" to provide the same capabilities as the right-side drop down buttons. Items added include:

  - Added drag and drop dialing to LCD window in the same manner as the Calls Window.

  - LCD window now displays and supports Extra Info icon operation.

  - User-defined actions can now be used on the "Extra Buttons".

- **OAISYS Tracer Integrations Improvements** – The integration with Tracer recordings has been expanded to include getting a copy of a recording for e-mailing to someone or reading and passing the file name of the current call recording.

  - Added feature to request an e-mail copy of a recording.
  - Added the ability to dynamically add new bookmarks text strings.
  - Added a new token (%X ("~RECFNAME")) to read/pass file name. Also possible to show in the Extra Info screen.

- **Outlook Calendar Integration** – The new Outlook Link (V1.3.10 or higher) supports new Calendar items to create actions to inform the user of an appointment or a reminder of an appointment. The items added include:

  - Two new Personal Call Handler triggers: "Outlook Calendar Appointment" and "Outlook Calendar Reminder".

  - Two new Outlook Information tokens for use in the User-defined Actions: %OC ("fieldname") for appointments and %OR ("fieldname") for reminders. The "fieldname" values are:
    - SUBJECT – Subject field of Outlook event.
    - START – Start Date/Time event.
    - END – End Date/Time event.
    - IMPORTANCE – Importance (Low, Normal, High) of event.

- LOCATION – Location of event.
- ADVANCE – Number of minutes of advance notice this reminder is given.
- STATUS – Busy status (Free, Busy, Out of Office) of event.

- **Post Call Survey Support** – Supports an "auto transfer" on hang-up for use as a Post Call Survey. Uses two Extra Info fields titled "~PC_DEST" or "PC_DEST".

- **Personal Call Handler/User-defined Action Enhancements** – User-defined Actions are a key building block for customizing Net Phone to take action when the Personal Call Handling rules have specified triggering events were encountered. These actions have been expanded to provide the following functions:

  - Added an on screen Call Handler rules enable/disable control to make it easy to selectively use some rules at different times.
  - Added a right-click menu that includes "copy" a rule as well as "delete" a rule.
  - Added the availability of using Extra Info fields when defining Personal Call Handling rules when "Call Ringing" or "Call Answered" conditions exist.
  - The Run Program type has been expanded to run ".lnk" and other file types.
  - Added Set Phone DND to On/Off or On w/DND Msg. Including ability set or reset DND for either the Primary phone (Soft Phone) or the Secondary phone.
  - Added Set Status Message to set a status message on your Net Phone.
  - Added Set Phone Forwarding to set PBX call forwarding.
  - Changed Time token (&T) to support time+'x' minutes so that &T+35 will be current time plus 35 minutes. Thus creating an action Set Status Message for OUT TO LUNCH TIL &T+30 will show you returning in 30 minutes from the time it is invoked.
  - Added new Time token (&U) to show time in US format of time followed by AM/PM which also supports the +'x' minutes. Thus an action "OUT TIL &U+30 created at 14:25 will read OUT TIL 3:05PM.

- **Admin Controls** – Several additions have been made for administering Net Phones. These include new background files for centralized control of multiple Net Phone configurations, structural changes for working within Windows plus a new change for the user to control Call History contents.

  - A new configuration file (NP_AppBs.ini) was added for centralized COS administration of Application keys with the ability to publish these settings for other Net Phone users.

- Added COS setting to prevent selected users from 'accidentally' exiting Net Phone.
- Made software structural changes to better support Microsoft recommended procedures for applications running the Windows operating systems.
- Added a new set of definitions in Preferences allowing the user to easily turn on Call Logging (Call History) and determine the types of calls to include within the list.

- **ACD Enhancements** – Adds to Net Phone improved interaction with Strata ACD to allow the supervisor to make a choice at the time of logging in whether to accept calls or not.
  - Give ACD Supervisors, at time of login, the option to "take calls".
  - Provide a 'Y' or 'N' indicator per group for "taking calls"
  - Changes the displays of Supervisor's Net Phone to show "Call Monitor" when monitoring an agent and "In Conf" when the call is joined, but an Agent's Net Phone to not show any markings of the call being monitored or joined.
  - Agents who use Net Phone will no longer see the "In Conf" display when a supervisor is monitoring the call, while the supervisor using Net Phone will continue to show this status. Thus "Silent Monitoring" is maintained.

- **Message Waiting** – Expanded operation of the Message Waiting feature.
  - Added MsgWait Count indication on LED.
  - Added right-click on LED to show list of messages and allow selecting a message to dial.
  - Fixed Msg Wait feature to work with multiple V-mail boxes and dial directly back to the target V-mailbox containing the message (requires using Axxess V5.3 or higher).
  - Added option playing a sound (WAV file) when the Message Wait indication changes from none to 1.

- **DSS Keys** – Added the ability to distinguish "busy" status from "ringback" status.

- **Chat Enhancements** – Several new features have been added to Chat:
  - A new menu item has been added when right clicking on the name in the Chat listing to offers to "Call on Phone" as well as "Chat Call".
  - Added an option to show or not show off-line users in the <<Everyone>> group.

- Added dynamic key re-sizing for Quick Response keys on the bottom of the Chat window.
- Added a Whiteboard capability within Chat to allow the sharing of the screen with another user within the Chat domain.
- Share screen with other user and display files on other persons PC.
- Pen colors and sizes for drawing on the screen.
- Short-cut keys for quick changes to pen size or color.

- **Debug/Troubleshooting Tools** – A Ziplog Utility has been added to Net Phone for making debug and troubleshooting of problems much easier. Also the control for turning on the Advanced menu option to get to the Event and Calls Windows has now been enabled via the Preferences settings. The user can now go to Setup > Preferences >Advanced Tab to zip and send all pertinent files to for detailed troubleshooting.

- **Improved Skins Designer** – The Skins Designer now provides a within the screen set of controls with sliders for adjusting the color selections when designing or making new skins. These sliders provide instant feedback to the effects of the changes while designing or changing a skin.

- **Application Integration Enhancements** – The interfaces for working with 3rd party applications have been expanded in a couple of areas to provide more opportunities for customizing the interface to meet your application. The additions provided in this release include:

- Add to COM Interface "GetInfo( )" a "DATAPATH" to complement "EXEPATH".

- Add to COM Interface "GetInfo( ) an "ACTSLIST" to support user-defined actions on external buttons.

- Two new DDE commands added to support other 3rd party applications wanting to send calendar status and reminder commands:

    - CALSTATUS,<BusyStatus>,<Start>,<End>,<|Subject|>,<Importance>,<|Location|>, <RemindBefore> where: <BusyStatus> =0 (Free), =2 (Busy), =3 (Out of Office) and <Importance> =0 (Low), =1 (Normal), =2 (High).

    - CALREMIND, <BusyStatus>,<Start>,<End>,<|Subject|>,<Importance>,<|Location|>, <RemindBefore> where: <BusyStatus> =0 (Free), =2 (Busy), =3 (Out of Office) and <Importance> =0 (Low), =1 (Normal), =2 (High).

Requirements

PC Requirements

Net Phone only

The Net Phone software can be loaded on a standard IBM-compatible PC running Windows 98, Windows NT, Windows XP, Windows 2000 or 32bit Windows Vista software. The specific requirements of this PC can vary; follow the recommended configuration for each operation.

Net Phone with Soft Phone Audio

The PC requirements for running the VoIP Soft Phone software requires at least Windows 2000, XP or 2003, but not XP Home Edition to operate. Follow Microsoft's recommendations or higher for memory needs. The VoIP is not supported on the older Microsoft Operating Systems except for Net Phone operation only without audio. Physical devices to be used for headsets or handsets require a USB port.

LAN Requirements

The Net Phone communicates with the Net Server using a Microsoft network over TCP/IP, thus this type of network must be installed and running. If your site already runs a different network protocol, such as Novell IPS, you'll need to run a dual stack configuration.

Phone System

The Net Phone works with various telephone systems using a System OAI connection to the Net Server. The VoIP connection, when used, is made to another connection where the PBX supports the extension ports for VoIP. The phone system can be configured for either G.711 (standard) or the G.729 (compressed) formats. Speech can be played using the PC's sound card or for better quality you can use USB handset for a USB adapter for connecting a headset

Power-Up

The PC running the Net Phone software should typically be configured to automatically initiate the program whenever the PC is restarted or reset. When you startup the application, the Net Phone will automatically detect what type of PBX it is connected to and change it's user interface.

Support Plan (Maintenance)

Net Phone requires a license that is controlled in the Net Server to operate normally or it will run in a demo mode for a limited time period. This license contains the start date and support date. Toshiba offers free upgrades and technical assistance for all sites that maintain their system by extending their support date. The software will continue to run after the support date expires, but upgrades to add the latest features cannot work until the license is brought back into the support plan.

When you launch Net Phone you will see the Toshiba Splash Screen. By default the splash screen will not show support plan information. If you have ShowMaintOnSplash enabled in your COS file, the splash screen will display your Support Contract information. This is recommended as a reminder to the administrator of the date your plan expires. If your maintenance expires, you should Toshiba TSD Customer Service. The splash screen will look similar to the one below:
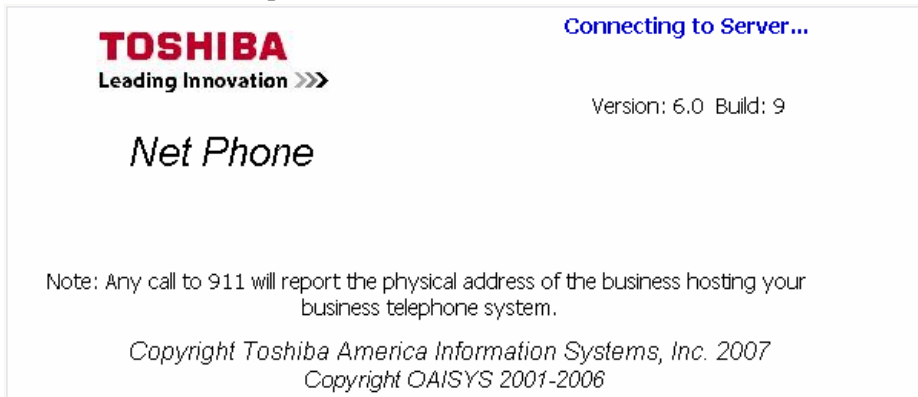
Beta Versions

Before attempting to run Beta Versions of Net Phone, the site must be current or "In Maintenance". That is, the target Toshiba system must on a current maintenance contract through the expected end of the BETA cycle for Beta Net Phone software to operate.

Important! *Also, each Beta version of Net Phone MUST is replaced with a released version of Net Phone at the end of the Beta cycle. If it is not replaced, Net Phone will revert to operating in "Demo Mode" once the date has been reached. The splash screen for BETA versions provides a reminder that includes the date of expiration.*

Installation 2

Two different Setup files are offered for installing Net Phone. The one titled **Netphone_xxx.exe** provides a complete installation for any individual PC. The second is titled **NP_xxx_Server.exe** and offers both an ability to install on an individual PC or installing on the Net Server PC for automatic updates.

To install the software on a number of different PCs can be made easier by either installing the Server-based version on the Net Server and opening a 'file share' to get a copy on each PC to create the initial installation. Even if not using the automatic upgrade capability, posting the individual setup file on a common PC to be accessed for installing on client PCs can save much time.

The following describes using the individual Net Phone Setup file. When using the Server Setup file, one additional step is needed to choose to install using the Client Installation instead of using the Server Upgrade Installation.

Installing Net Phone

- Start by checking to see that Net Server is installed and is operating on a Server PC on the network. Version 4.3.36 minimum is required for the VoIP audio capabilities to work. Take note of the "Network Name" of this server PC. This "Network Name" would be: 1) The NET BIOS name if the target PC is on the same LAN segment; 2) Or the complete domain name if reaching across a router or over a WAN.

- Run the **Netphone_xxx.exe** program to install Net Phone on the target PC. This opens the Installation Wizard (shown below), which will direct you through the following steps.

Figure 2   Strata Net Phone Installation Wizard

1. The initial screen will advise you to shut down all Windows programs to ensure that all modules can be installed. Click Next.

2. Please read the License Agreement and click the I Agree button if you agree with the licensing provision and want to continue with the installation process.

3. It is highly recommended that the default destination directory be used as the installation directory. If desired, you can browse to a different location for installing the software. Click Next.

4. Select the Windows Program Group for placing the start icons. Again, leaving as default (TOSHIBA) is recommended. Click Next.

5. The Select Startup Settings screen is used to pre-configure Net Phone to meet your individual needs. Select the radio button, if given the choice, to indicate whether you are going to login to the Net Phone with an Agent ID, login by Extension or if you plan to use the Net Phone for a Standard Desktop Phone. Also, enter a checkmark next to Soft Phone Audio to enable the VoIP Audio capabilities (requires a separate license). Click Next

Note This step is bypassed or has fewer options on some installations.

6. Select the options to be included with Net Phone. These options will appear on the Options Buttons along the bottom of Net Phone. A check in OAISYS Replay enables Step 7 for setting the Record Button options. Click Next.

7. If the Option Button OAISYS Replay were selected, then the Select Record Options offers the ability to Show Record Button, to manually Stop and Start the OAISYS Tracer recording, and the ability to enter Bookmarks on the active call. Click Next.

8. The installation process offers a wizard for the integration settings for a number of popular applications to be used with Net Phone. Make a selection from the list. If your application is not listed select "None" and contact Technical Support for an application note, if one exists, that note will provide instructions for making your application work. Click Next.

9. This step pauses to ensure you have made that all the parameters settings needed prior to prior to proceeding with the actual installation and making final settings. Click Next.

10. Finally, once all files and settings are completed, this screen will inform you of the completion. It is recommended that Net Phone be added to the Startup Group. Click Finish. Typically, you will be asked to restart your PC for all the settings to take place.

Setup User Profiles

When Net Phone is started, the first item that will need to be defined is at least one User Profile.

➤ **To define a User Profile**
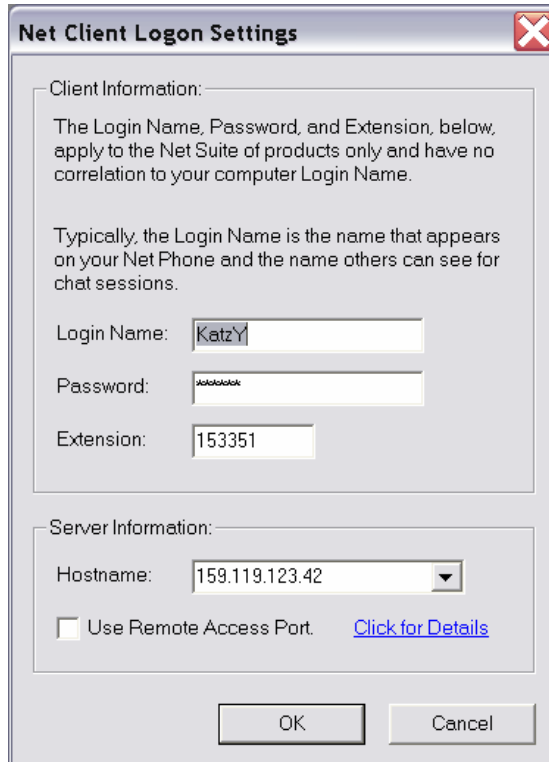
1. Go to the Main Menu > File > Change Login. The Net Phone Login Profile dialog box displays.

2. Select from existing profiles and click Use to set this profile into an active state.

   or click Add New to create a new profile or Modify to change the selected profile.
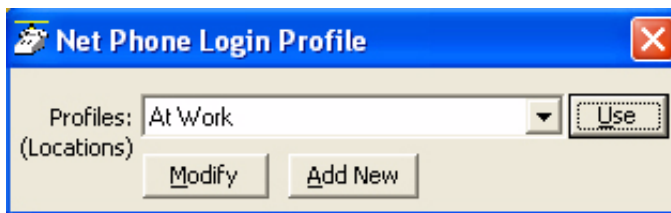
The definitions and offerings of both the Edit Profile and Add Profile dialog provide the same set of choices as shown in the Edit Profile screen shown below:
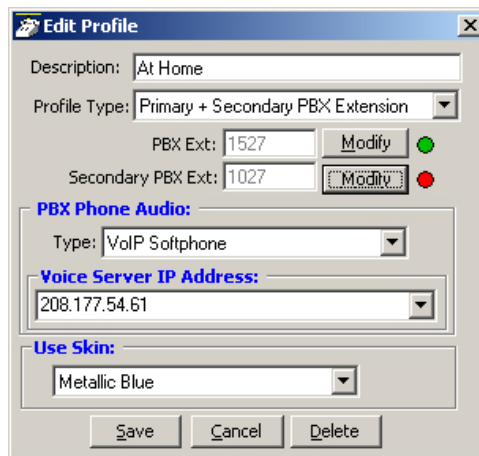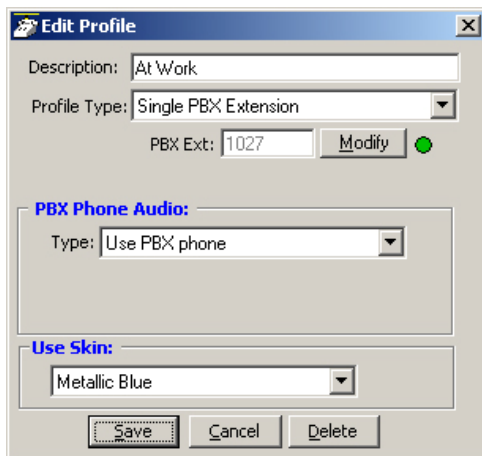
- Description – Enter a name (or modify the name) to call the profile.
- Profile Type – Use the pull down list and choose a type.
  - Single PBX Extension – Defines a single PBX DN that will be monitored for calls.
  - Primary and Secondary PBX Extension – Defines a primary and a secondary PBX DN that will be monitored for calls. This allows having a primary extension number, usually a VoIP station, plus still be able to get calls from your desktop phone.
- PBX Ext – Click the Modify button to open the Net Client Logon Settings dialog.
  - Client Information – Enter the User name, Password (optional), and extension number for the primary extension.
  - Server Information – Enter the Net Server PC's network name or IP address.

Net Client Logon Settings

Client Information:

The Login Name, Password, and Extension, below, apply to the Net Suite of products only and have no correlation to your computer Login Name.

Typically, the Login Name is the name that appears on your Net Phone and the name others can see for chat sessions.

Login Name: KatzY

Password: *******

Extension: 153351

Server Information:

Hostname: 159.119.123.42
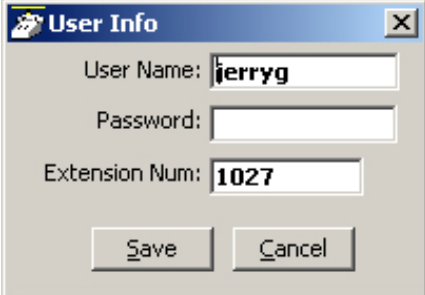
☐ Use Remote Access Port.   Click for Details

OK   Cancel

- **Secondary PBX Ext** – Click the Modify button to open the User Info dialog.

  - User Info – Enter the User Name, Password (optional), and Extension Number for the secondary DN to monitor. Click Save when done.

- PBX Phone Audio – Use the pull down menu and choose whether the primary connection is using the PBX Phone or VoIP Audio for the speech path.

  - Voice Server IP Address – When VoIP is selected, enter an IP address for the voice server providing the PBX extension.

- Use Skin – Each profile can choose which Net Phone Skin design to use. Use the pull down list and select a skin to use whenever this profile is selected for use.

Voice over IP Audio

When Voice over IP is used for the Audio connection, some additional choices are necessary for determining how the audio path will be connected to the PC. When VoIP is the primary DN, an additional button appears on the main screen of Net Phone. This button defaults showing Headset and when pressed shows SPKR. Right click on this button and the Audio Setup dialog will appear. This screen defines how the audio is handled and the device type used for primary (#1) connection (Headset button position) and for the secondary (#2) connection (SPKR button position). Each of these positions has speaker and microphone volume adjustments.
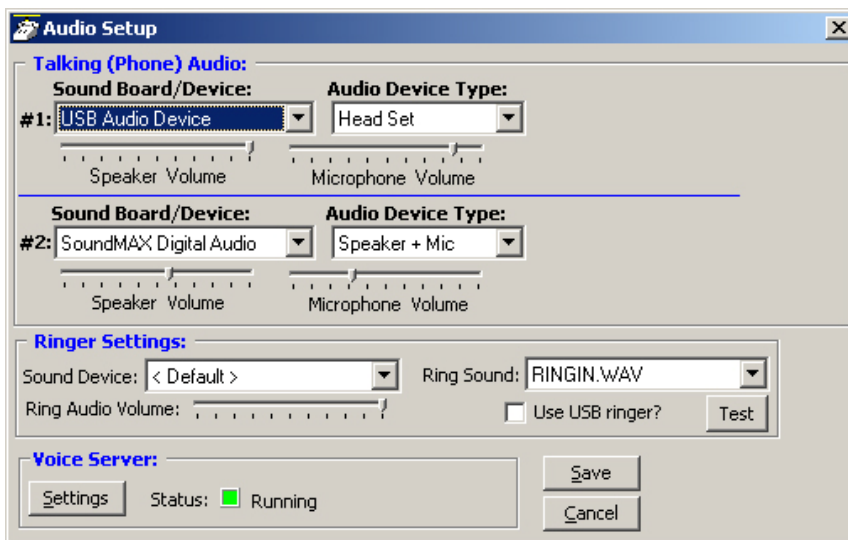
- Talking (Phone) Audio – Choose the Sound Board/Device to be used and the Audio Device Type from the pull down menus for both #1 and #2 devices.

- Ringer Settings – Choose the Sound Device to be used for the ringing indications. Choose the WAV file for the ringing sound.

- Voice Server – This provides access to the Modify Profile screen to make changes if needed and also provides the status of the connection with the PBX.

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Deploying Net Phone

3

When installing a system involving a number of Net Phones, using server-based configurations and/or copying of configuration files onto other PCs can improve the on-going administration. This section describes three server-based configuration items plus instructions for duplicating configuration data from one Net Phone onto other Net Phones. Typically, a combination of these items is used for deploying multiple Net Phones in your organization.

- **Server-based Automatic Updates** – Upgrades to Net Phone can be published on the server. Each time a Net Phone client attempts to make a connection to the server, its version is checked, when an update is available, this update may be offered or forced to the user causing the client PC to be updated.

- **Server-based Dial Plan** – A Dial Plan for making calls and how to treat Caller ID information is required for many Net Phone features. This can be a complex issue for many users, thus having a server-based common definition administered and tested by one person makes the settings for all other people. This makes it much easier for each user.

- **Server-based Net Phone COS** – The Server controlled COS requires the Net Phone configuration files to be stored on and used from the central server. This allows the system administrator to setup a configuration, save it to the server, and then have a group of Net Phones use that configuration from the server. Thus by making a single configuration change, the system administrator can cause that change take affect on all users (in the group).

- **Copying Configuration Files to Other PCs** – As an alternative to creating a centralized COS or Dial Plan, it may be useful to create a configuration on one PC and copy these configuration files from this PC to others being setup. This operation saves time and may be practical for smaller installations.

Server-based Automatic Upgrades

Net Phone supports an automatic upgrade feature to ease the burden of installing new releases on dozens of workstations, and setup files are released for each new version of Net Phone:

Netphone_xxx.exe = Complete Setup file for Net Phone clients.

NP_xxx_Server.exe = Configures Net Server for automatic Net Phone updates. This setup file contains a file called **NP_Upgrade.exe** used for patchable updates when needed.

Where **xxx** is the specific PBX version of the file.

All files are available on the Toshiba FYI site.

How it Works

Net Phone connects to Net Server at startup. During the login phase, Net Server checks the version of Net Phone and compares it to the upgrade information in an ".INI" file. If the client is current, Net Server allows the connection. If the client is out of date, Net Server compares the client version to a list of "patchable" versions. If the client is "patchable," Net Server sends a copy of **NP_Update.exe** to the client. If the client is not "patchable," Net Server sends a copy of **Netphone_xxx.exe** to the client.

The client receives the appropriate upgrade file via the Toshiba Transfer Protocol. This protocol operates on the normal Toshiba TCP port (8767). Clients connecting to Net Server through a firewall will receive upgrades normally through the standard 8767 port, i.e., if Net Phone can connect to Net Server, it is eligible to receive Automatic Upgrades.

Net Phone displays either an "Upgrade in progress" dialog box (Forced Upgrade), or notifies the user that an upgrade is available and offers the option to upgrade now (Optional Upgrade). If the user chooses to upgrade, Setup displays a warning if it detects other TOSHIBA applications (Chat, DSS) active on the PC and asks the user to exit those applications. If the user does not exit before continuing, Setup may attempt to restart the PC after completing the upgrade. Setup does this to ensure all TOSHIBA applications are using the current files.

Setting Up Net Server for Automatic Upgrades

The System Administrator must install the upgrade files on the Net Server. Launch **NP_xxx_Server.exe** on the Net Server PC.
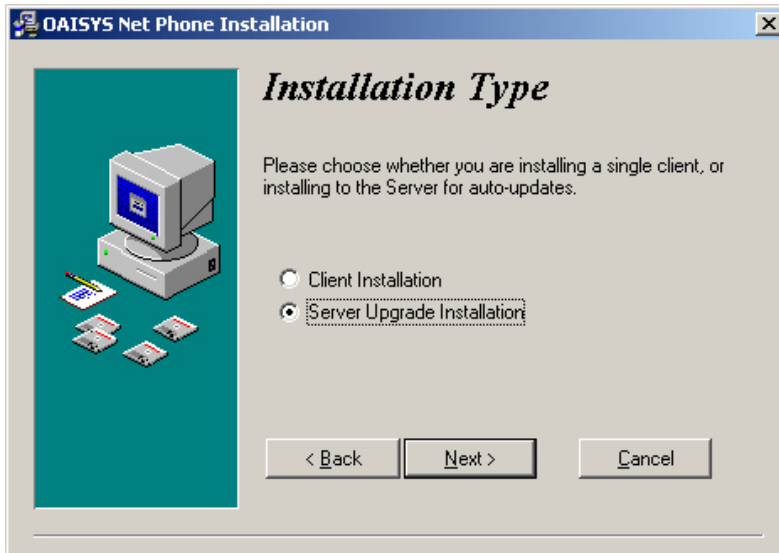
Choose your Installation Type. Select **Server Upgrade Installation**.

- **Client Installation** runs the normal Net Phone Setup to install a copy for use on the local PC.
- **Server Upgrade Installation** installs the appropriate files on the server PC.

Click Next.

Select whether to **Force the Update on Each User** or **Give User Option to Upgrade**. For most LAN installations, forcing the users to upgrade is the best choice. If you support users who connect via IP devices over relatively slow WAN links, you should give your users the option to decline the upgrade. Users on slow links can choose to upgrade during periods of low activity, or after hours.

Advanced Information

Setup creates a folder called "NetPhone\Install" in the Net Server folder. Setup places copies of **netphone_xxx.exe**, **NP_Upgrade.exe**, and **InstallVersion.ini** in the Install folder.

The **InstallVersion.ini** file is part of each release of **NP_xxx_Server.exe**. Do not modify the contents of InstallVersion.ini unless specifically directed by a CTS Technical Support Engineer. The contents of a sample file is defined in the table below:

[Version]	Settings Definitions
NewVersion="V4.0.202"	New Version = Text string indicating the now current version of Net Phone.
Date="01/03/2002"	Date = Text string indicating the ship date of the now current Net Phone.
FullFile="netphone_xxx.EXE"	FullFile = Text string containing the filename of the full Net Phone Setup file.
PatchFile="NP_Update.exe"	PatchFile = Text string containing the filename of the incremental patch file.
ForcedUpdate=N	ForcedUpdate = Y or N – indicates whether user has the option to decline the upgrade.
FromVersion="V4.0.32; V4.0.33; V4.0.34; V4.0.35; V4.0.36; V4.0.37; V4.0.38; V4.0.39; V4.0.200; V4.0.201"	FromVersion = Text string containing a list of versions from which a PatchFile upgrade is valid. If the current client version appears in the FromVersion list, Net Server sends the PatchFile to the client. If the current version does not appear in the list, Net Server sends the FullFile to the client.

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Server-based Dial Plan 4

Each Net Phone can be configured to follow a local Dial Plan or a Server-based Dial Plan. This is controlled in Net Phone's Preferences dialog box under the Dialing Tab. How a person accesses outside lines and the numbers to be dialed can be fairly complex and is best administered using a central set of rules and a person familiar with the PBX and local dialing rules. Thus we recommend that a central Dial Plan be established, which will update all users whenever changes are made in the PBX or outside dialing patterns.

Dial Plan Setup

Each area of the US uses a different set of rules for determining which calls are local or long distance calls. The opening pages of your phone book are a good source for how to dial different numbers in your area. Your PBX administrator will also need to define access codes for reaching outside lines. These pages generally define how to dial different areas and provide a listing of prefix codes for the local calling areas. Three typical examples are:

1. **Phoenix, AZ** – all calls within the "602", "480", and "623" area codes are considered to be local calls, while all calls outside those area codes are considered long distance.

2. **Santa Fe, NM** – calls to some office codes within the "505" area code are considered to be local calls, while other calls to the "505" area code are considered long distance.

3. **Atlanta, GA** – all calls to area codes "770" are considered to be local calls while some calls to the "404" and "678" area codes are also considered to be local calls.

Therefore to correctly handle the dialing of numbers you should create a dialing plan.

➤ **To Setup a Dial Plan on the Server**

1. Go into the Net Server, under Processes, Show the Dial Plan Service (right-click and choose Show Service).

2. In the Dial Plan Service dialog box, click the Setup Dial Plan button to show the following screens:
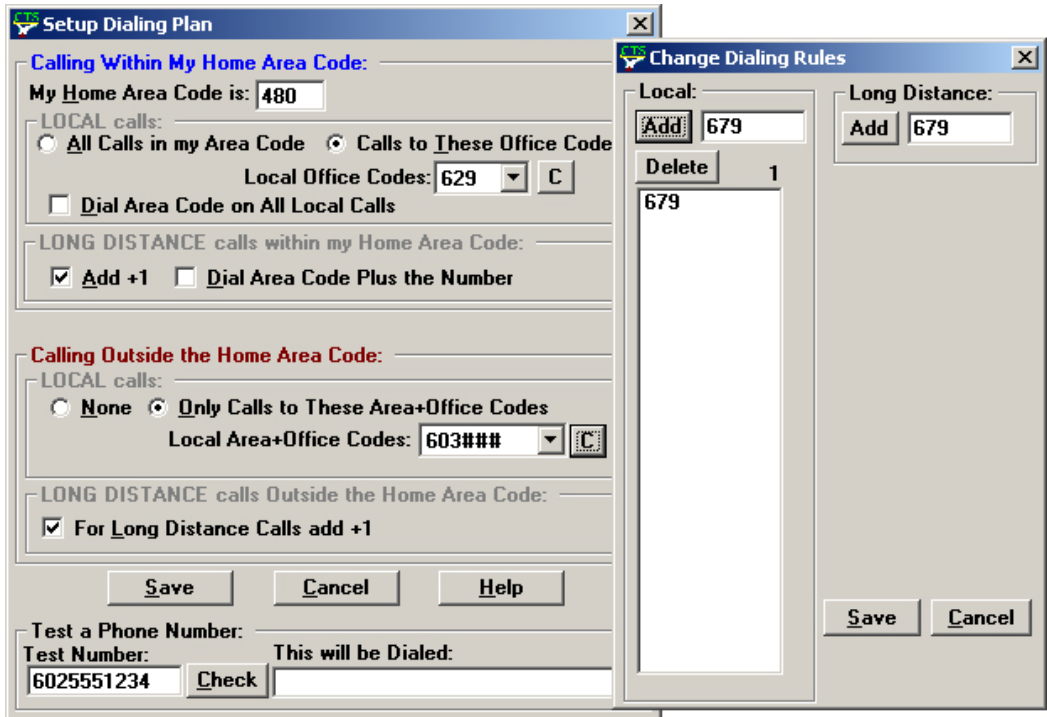
Calling Within My Home Area Code

- **Home Area Code** – Set this to the Area code where the phone is located. This will be used by Net Phone to determine which dialed calls are within your home area code and when searching a contact manager (reverse screen-pop) the dialed number will need the area code included, i.e. Microsoft Outlook.

- **Local Calls?** – Select either All Calls in my Area Code or only Calls to these Office Codes.

- **Local Office Codes** – When you choose Call to these Office Codes, the pull down listing shows the exchange codes (prefix codes) that are considered to be a local call from your location. To add, delete or change any codes, click the C button to display the "Change Dial Rules" screen.

  - **To Add Local Prefix Codes** – Enter the prefix code and click Add. The wild card character '#' can be entered at the end of a prefix code entry to represent a range of codes. For example, 75# would represent all codes 750 to 759 and 7## would represent codes 700 to 799.

  - **To Delete Local Prefix Codes** – Highlight a prefix entry and click Delete button. The delete button removes the entire entry from the list, thus if the entry has a wild card, then it removes all codes represented by the wild card.

  - **To Delete a Specific Prefix Code** – To delete on prefix code that is part of a range of codes entered using a wild card character, enter the prefix code to be considered not local in the Long Distance box and click Add. For example, if prefix code 755 is long distance but all other 75# codes are local, first enter 75# into the local list and the add 755 as Long Distance – the resultant local list will be 750, 751, 752, 753, 754, 756, 757, 758 and 759.

- Dial Area Code on Local Calls – Enable this feature in areas, such as Atlanta, where you must always dial the full 10-digit phone number (include the area code) even when the call is local. Most areas of the US, local calls do not include the area code and dial only 7 digit numbers for local calls. Any number dialed from another program or hot key dialing will be down to its base 7 digits by removing the Home Area Code before it is dialed.

- Add+1 – Check the box if you need to dial a leading 1 before the number for calls within your Home Area Code.

- Dial Area Code Plus the Number – Check the box when the home area code is also to be dialed.

Calling Outside the Home Area Code

- **Local calls?** – Select either None or Only Calls to These Area+Office Codes.

- **Local Area+Office Codes** – This entry is only presented when you chose Only Call to These Area+Office Codes in the previous step. The pull down listing shows the codes (area code plus prefix codes) that are considered to be a local call from your location.   Click the C button to add, delete, or change codes by displaying the "Change Dial Rules" screen.

  - **To Add Local Area+Prefix Codes** – Enter the six digit area+prefix code and click Add. The wild card character '#' can be entered at the end of a prefix code entry to represent a range of codes. For example, 602### would represent all prefix codes in area code 602.

  - **To Delete Local Area+Prefix Codes** – Highlight a prefix entry and click Delete button. The delete button removes the entire entry from the list, thus if the entry has a wild card, then it removes all codes represented by the wild card.

  - **To Delete a Specific Area+Prefix Code** – To delete one prefix code that is part of a range of codes entered using a wild card character, enter the prefix code to be considered not local in the Long Distance box and click Add.

- **For Long Distance Calls add +1** – Check the box when you need to have a leading one ("1") added when making long distance calls outside your home area code.

- Click **Save** when done.

Test a Phone Number

Test a Phone Number – Dialing plans can become complex. Use these boxes to enter different telephone numbers and check to see the number that will be dialed. The dialed number should be identical to what you need to dial when using your phone to manually dial.

Server-based Net Phone COS   5

The creation of a Server-based Class of Service for Net Phone begins in Net Server using the Net Server Administrator program, followed by creating your configuration on the Admin Net Phone, then publishing the configuration files to the Net Server PC. The steps are as follows:

The following steps show an example creating two user groups, users and administrators, and assigning a class of service to each. Multiple groups can be assigned, each with its own configuration created by the Administrator common to that group.

Step 1: Create User Groups (Net Server)

1. Open Net Server Administrator by selecting Setup/Administration from within Net Server.

2. Log in with username admin and password admin.

3. Select the User Groups tab.

4. Click the **Add New Record** button (see circled button on following diagram).
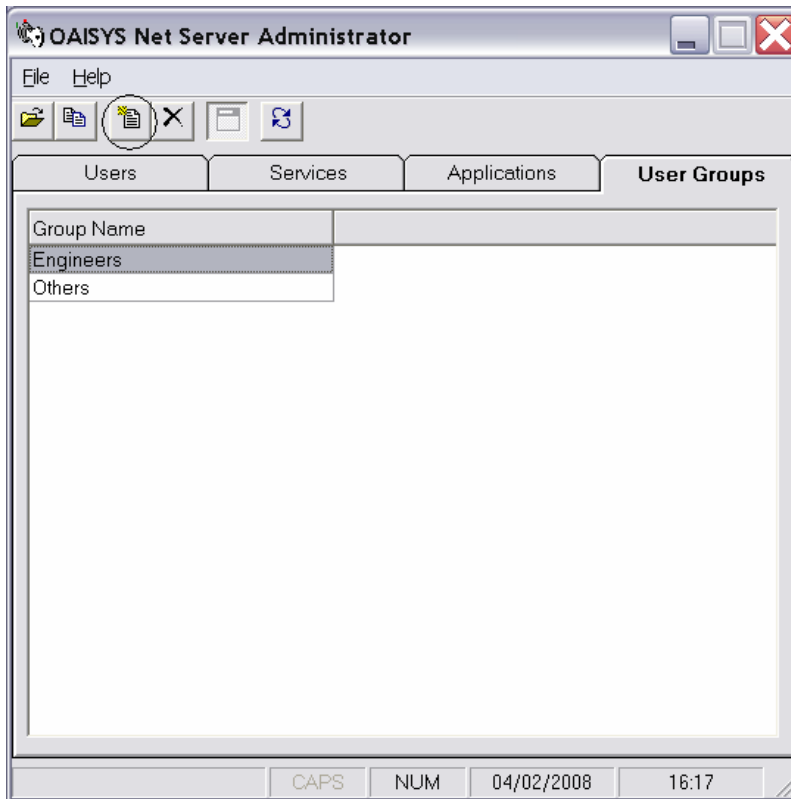
5. Type in a name to represent the Net Phone Administrator (NetPhoneAdmin in this example) and click Okay.

6. Click the Add New Record button again, and this time, type in a name to represent the Net Phone Users' group (NetPhoneUsers in this example).

Create New Group	Create New Group
NetPhoneAdmin	NetPhoneUsers
Okay Cancel	Okay Cancel
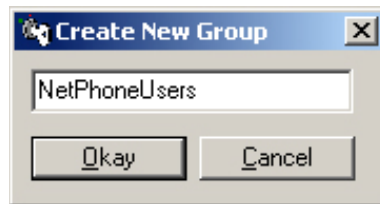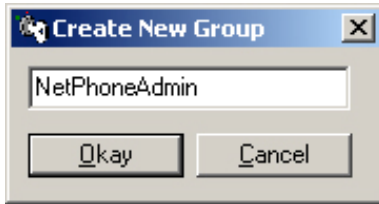
7. Click Okay.

8. Repeat the above steps to create any other Net Phone user groups as needed. The Net Server User Groups should now look like this:

OAISYS Net Server Administrator

File   Help

Group Name
Engineers
Others
NetPhoneAdmin
NetPhoneUsers

Tabs: Users | Services | Applications | **User Groups**

Status bar: CAPS | NUM | 04/02/2008 | 16:20
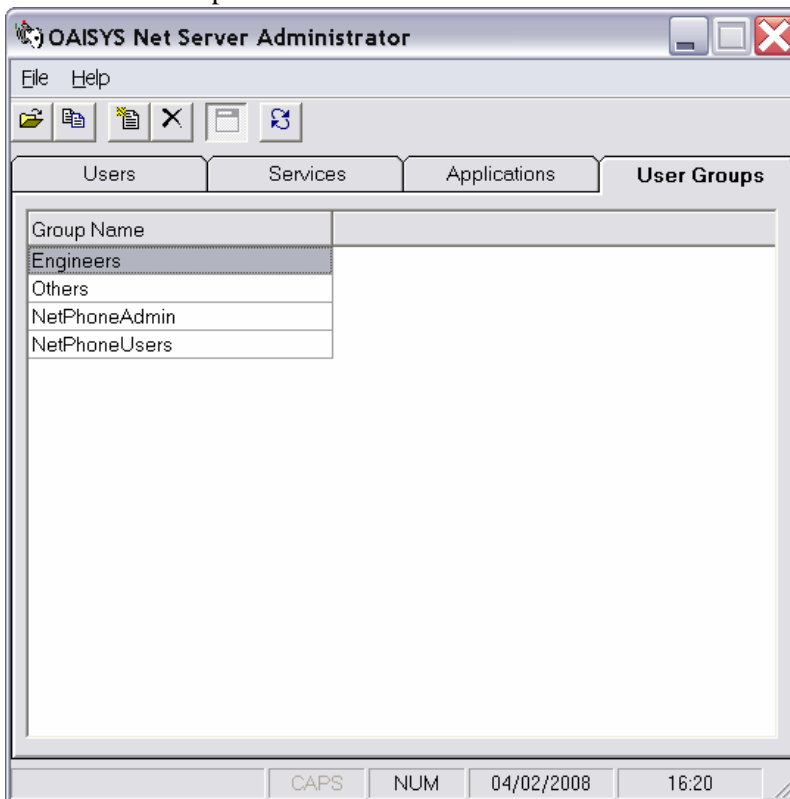
Step 2: Assign Users to Net Phone Application (Net Server)

By assigning User Groups to the Net Phone application allows you to assign a common "Class of Service" and "Configurations" for all users in a group. Individuals that are not part of a group can also be assigned as a Net Phone application user.

1. Select the Applications tab. Highlight the Net Phone entry.

   • Named User Groups – You can create named groups (like "NetPhoneAdmin", "NetPhoneUsers", etc.) for assignment of a common "Class of Service" and "Configurations" for everyone in the group.

   • Individuals – Setup individuals as an Application User ONLY to exclude them from the <Default> group.

   • <Default> group – Setup this group as a 'catch-ALL' group. That is, anyone not specifically listed in a named group is assumed to belong to this <Default> group.
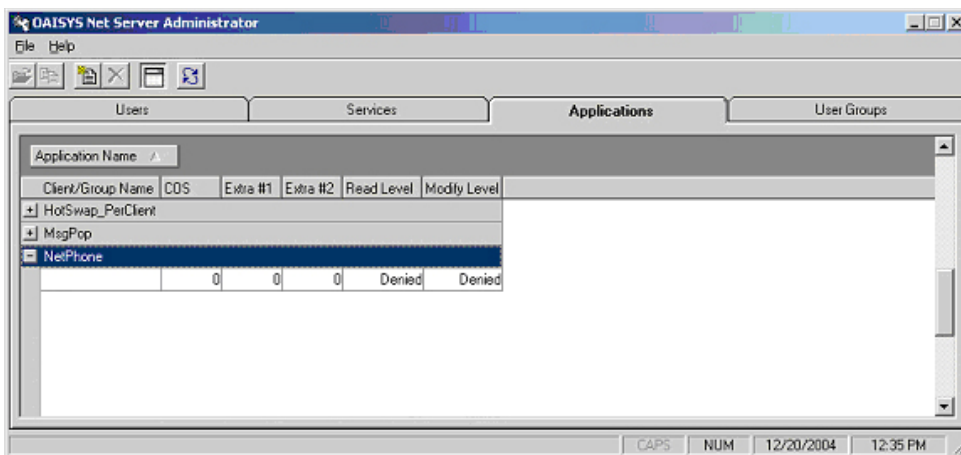
2. Add User Groups to Net Phone – Click Add New Record (see circled button above). The following window pops up:

Add New Application Client ✕

Application: NetPhone ▼

Class of Service:
○ Manual ● Automatic

Client Information:

Client/(Group): <Default> ▼

Read Level: Denied ▼

Modify Level: Denied ▼

Setting #1: 0

Setting #2: 0

☐ Server Admin Privilege
☐ Use Server-based Configurations
☐ Group Admin Privilege #1
☐ Group Admin Privilege #2
☐ Other App Privilege #1
☐ Other App Privilege #2

COS: 0   App Files...

Done   Cancel

- Select the newly created NetPhoneAdmin Group from the Client/(Group): drop-down box.

- Select World for both Read Level and Modify Level from their respective drop-down boxes.

- Place a checkmark in the Server Admin Privilege checkbox. The window should now look like this:

- Click Done.

3. Repeat by highlighting the NetPhone entry and click the Add New Record button again.

   - Select the NetPhoneUsers Group created previously from the Client/(Group) drop-down box.

   - Select Denied for both the Read Level and Modify Level from their respective drop-down boxes.

   - Uncheck the Server Admin Privilege checkbox.

   - Place a checkmark in the Use Server-based Configurations checkbox. The window should now look like this:
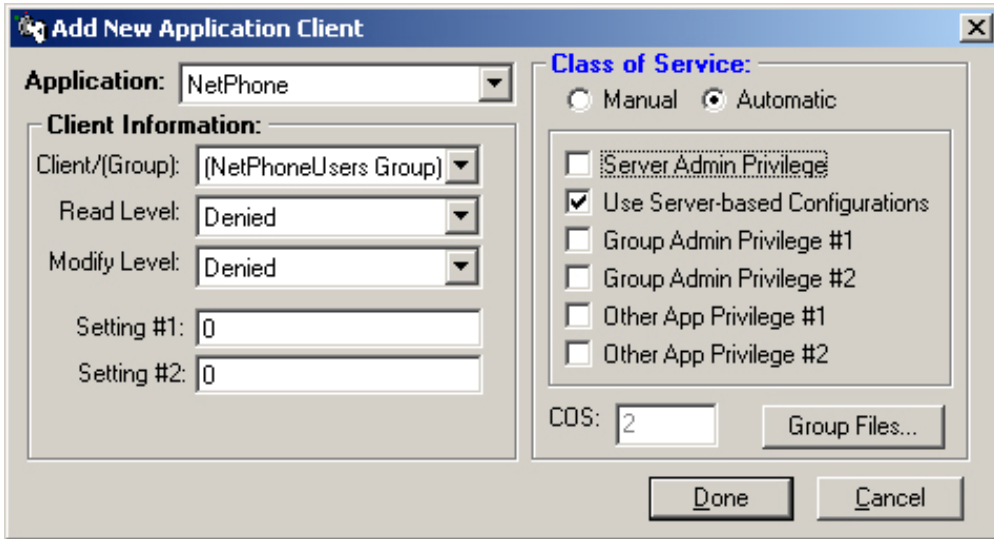
- • Click Done.
4. Repeat the preceding steps to add any remaining Net Phone user groups.

Step 3: Assigning Users to User Groups (Net Server)

1. Select the Users tab. The following screen appears:
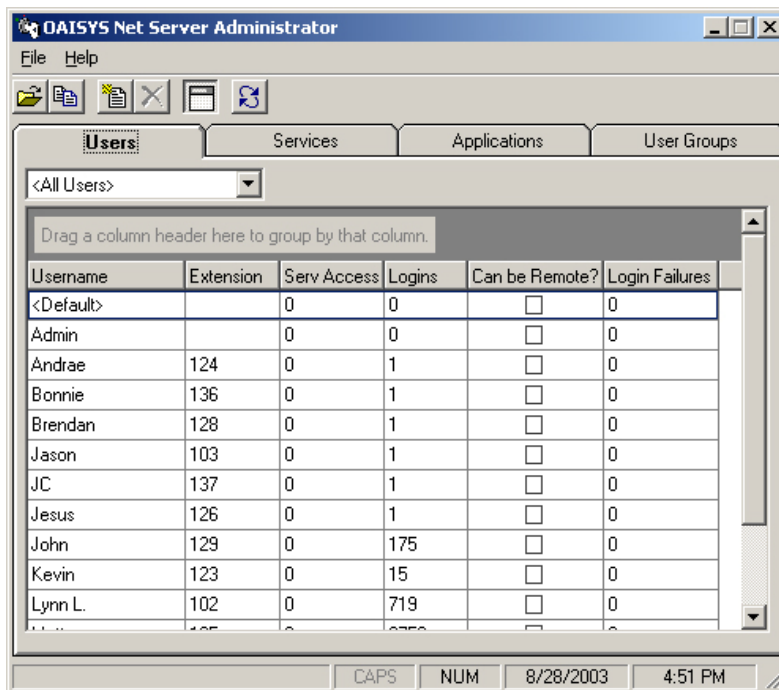
➤ **To Assign Users as Net Phone Administrators**

1. Scroll down the list of User Names.

2. Double-click on the User Name (NPAdmin – 1000 in this example.) to be a Net Phone Administrator.

3. Create a new user if not found.

4. Place a checkmark in both the Admin and Users groups as is shown in the following screen:

5. Click Done.

6. Repeat for other Net Phone users to be assigned as Administrators.

➤ **Assign Users as Net Phone Users**

1. Scroll down the list of User Names

2. Double-click on the User Name (NPAdmin – 1000 in this example.) to be a Net Phone User.

3. Place a checkmark in the User group only as is shown in the following screen:

4. Click Done.

5. Repeat for other Net Phone users to be assigned as Users.

Step 4: Create Configuration Files using Admin Net Phone

Restart the Administrator's Net Phone, if Net Phone is running, shut it down and restart. Set up the buttons, Call Handler rules, skins, etc. as you would like the users' Net Phones to be configured. Use the Net Phone User's Guide as needed for how to configure Net Phone. Additional advanced configuration information can be found later in this document.

➤ **To Change the COS Configuration**

1. Once the configuration is done, click the Main Menu icon on Net Phone (top left) and select File > Publish. The following window appears:
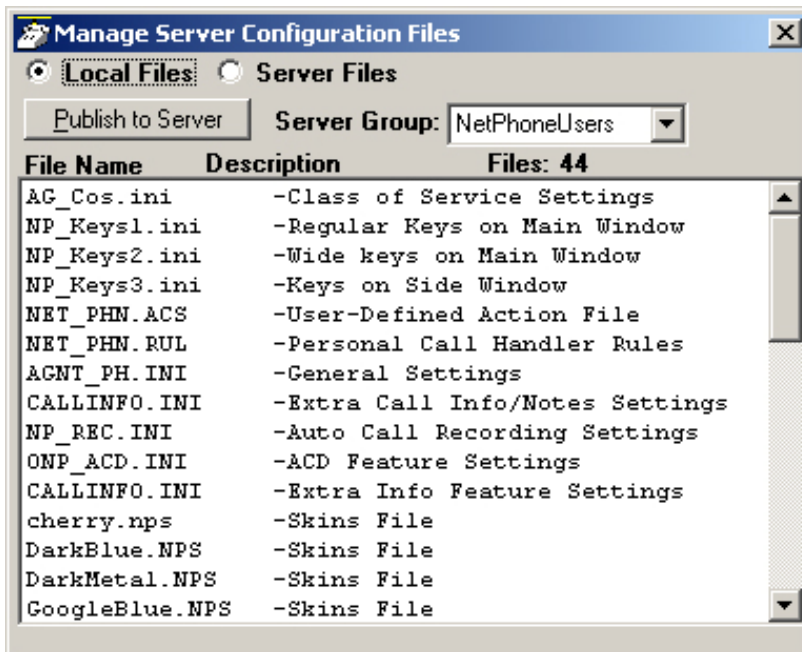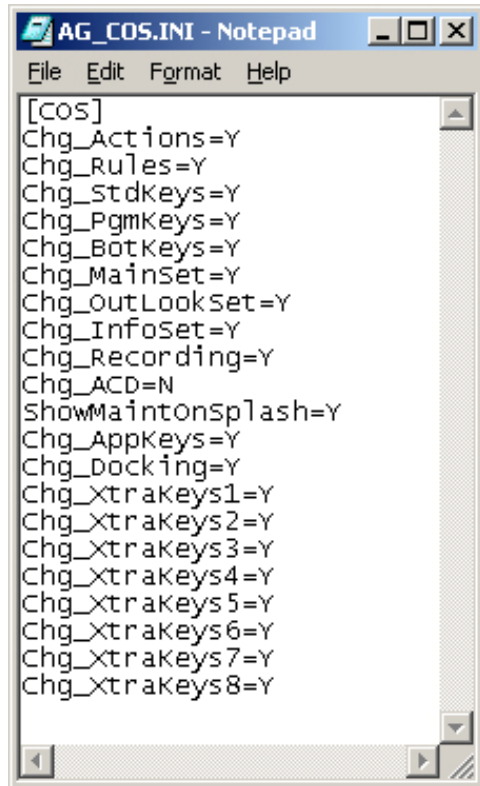
2. Select the Server Group: NetPhoneUsers (the group created earlier for users).
3. Left-click on the file name "AG_COS.INI" to highlight it.

4. Right-click on the highlighted file and choose Edit. The window shown right appears:

5. Change each value from '=Y' to '=N' that should be set and controlled from the Server. Any items left using the '=Y' setting will allow the user to change and keep those settings on that local PC. The file from the server will not be downloaded. (See "Editing the AG_COS.INI File (COS)" on page 50)

6. Click File > Save to save the changes. Close the "AG_COS.INI" file.

```
AG_COS.INI - Notepad               _ □ X
File  Edit  Format  Help
[COS]
Chg_Actions=Y
Chg_Rules=Y
Chg_StdKeys=Y
Chg_PgmKeys=Y
Chg_BotKeys=Y
Chg_MainSet=Y
Chg_OutLookSet=Y
Chg_InfoSet=Y
Chg_Recording=Y
Chg_ACD=N
ShowMaintOnSplash=Y
Chg_AppKeys=Y
Chg_Docking=Y
Chg_XtraKeys1=Y
Chg_XtraKeys2=Y
Chg_XtraKeys3=Y
Chg_XtraKeys4=Y
Chg_XtraKeys5=Y
Chg_XtraKeys6=Y
Chg_XtraKeys7=Y
Chg_XtraKeys8=Y
```

Step 5: Publishing the Configuration Files

When a Net Phone is assigned with "Admin" privileges (either the Server Admin Privilege or the Group Admin Privilege #1), then a Publish item will be provided on the File menu.
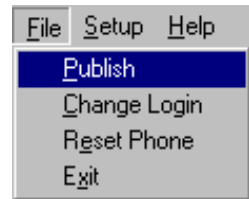
When the Publish menu is selected a screen similar to the screen shown right. If you only have the Group Admin Privilege (and not the Server Admin Privilege) then the Group name field will show your group name and you will not be allowed to change it. However if you have the Server Admin Privilege you can publish to any group by entering the group name. By blanking out the group name you will be publishing to the <Default> group area.

- Select NetPhoneUsers from the Server Group drop-down box. From the file list, highlight the files you would like to apply to the users' Net Phones. It is recommended that all files be selected.

- To publish files to the selected Server Group, click the Publish to Server button.
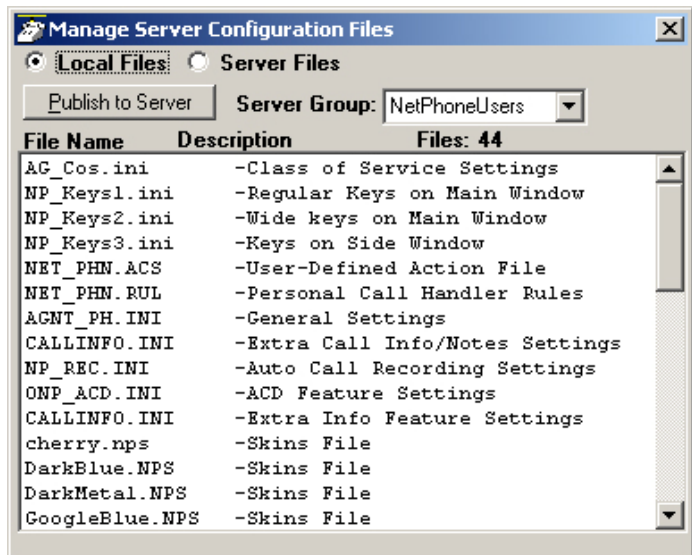
Note Always publish the Class of Service Settings file (AG_COS.INI) after editing it to the user-desired settings.

Verification of Settings

The Net Phone at each desk must be restarted for the configuration changes to take effect. If you have included the button files in this configuration, verify that the user does not have the ability to change the buttons' features. If you have included Call Handler rules in the configuration, verify that the user's Call Handler has the appropriate rules set up. If anything else was included in the configuration, check those settings as well.

Managing files on the Server

Sometimes it may be useful to view and manage the configuration files on the Server. When the radial button on the top of the Manage Server Configuration Files screen is changed to Server Files, a list of the files posted on the server for that group is displayed. Any file can be retrieved from the server by highlighting that file, then right clicking and choose to Copy File from Server. A warning dialog box will appear asking if you want to replace the corresponding file on your PC. If you answer yes, then you can now edit or test that configuration. After making changes, use Publish to move the updated file back to the Server.

Note Always use extreme caution when editing files to only make changes that are appropriate. Any changes in the configuration files will take affect on each Net Phone in the group the next time the Net Phone is either "Reset" or restarted.

Duplicating Configuration Files to Other PCs

Another method for rolling out Net Phones on multiple PCs is to define the configuration on one Net Phone and copy the appropriate configuration files onto other PCs. This method allows users to control their own configurations, while they start from a common configuration. This may be preferable for some installations, especially sites having only a few Net Phones.

All files controlling the configuration can be found in your user's Local Settings, typically "Documents and Settings\<user name>\Application Data\CTS\Netphone".

Dial Plan Configuration File

The Dial Plan is a key file that can take time to create and test to ensure it works. If not using a server-based Dial Plan, copying this file onto other PCs can save a lot of time in getting multiple Net Phones working.

Config File	Description
DIALRULE.INI	Local Dial Plan Rules. Can also be copied to Server for Server-based Dial Plan.

Net Phone Configuration Files

The following .INI files control the major configuration parameters for Net Phone. Use caution when copying these files since using Net Phone continuously stores information in these files. It is recommended to copy these files when initially deploying Net Phone, but since personal preferences are also stored in these files, overwriting these files after users have started using their Net Phone could erase these settings.

Config File	Description
AGNT_PH.INI	Main Configuration File
ONP_ACD.INI	ACD Feature Settings
NP_REC.INI	Record-a-Call Settings

Button Configurations

The buttons can be defined on one PC and copied to other PCs to create an identical set of functions. The following files define the configurations of the buttons on the phone.

Key Configs	Description
NP_KEYS1.INI	Defines Shortcut Keys, Keys on Main NP screen (except ACD wide keys), and current Skin selection.
NP_KEYS2.INI	Configuration of the ACD wide keys on Main NP screen.
NP_KEYS3.INI	Configuration of keys on right-slide out button grouping.
NP_AppBs.INI	Configuration of links (keys) for optional application features.
NP_XKYS1~8.DAT	1st ~ 8th Bank of Extra Keys

Directory Files

The directory files are frequently compiled automatically, but sometimes they may be manually created or manually edited and the same copy needed on multiple Net Phones.

Directory Files	Description
MainDir.txt	Net Phone looks for MainDir.txt in the application folder. If found, Net Phone automatically creates: FeatDir.txt and/or the ExtDir.txt file.
ExtDir.txt	The default Extension Directory
FeatDir.txt	The default Feature Code directory listing.
MyDir.txt	The default Personal Speed Dial listing.

User Defined Actions

Net Phone uses the compiled list of User Defined Actions. Actions can be created, tested and exported to create *.AC files. Renaming these files accordingly (exported files have a numeric value for a name) and changing the suffix when needed can provide the best way to copy selected actions to other PCs.

Action Files	Description
AGT_PHN.ACS	Compiled User Defined Actions
*.AC	Exported Action file.
*.ACI	Imported by Net Phone upon startup only when an action of the same name does not exist in the compiled set of actions (AGT_PHN.ACS). Thus, when this file exists and the user made changes to this action, the user can revert back to the original operation by deleting the current action in Net Phone, then stopping and restarting Net Phone. This file is renamed to *.AC once imported.
*.AC1	When the last character of the file name extension is a '1' (number), the file is always imported, overwriting an existing action. The file is deleted once imported.
*.ACO	When the last character of the file name is 'O' (letter), the file is always imported upon startup, overwriting an existing action. The file is not deleted.
*.AC0	When the last character of the file name is '0' (number), the file is only imported upon startup if the compiled action file is missing (AGT_PHN.ACS).

Personal Call Handling Rules

Net Phone uses the compiled list of Personal Call Handling Rules. PCH Rules can be created, tested and exported to create *.RU files. Renaming these files accordingly (exported files have a numeric value for a name) and changing the suffix when needed can provide the best way to copy selected rules to other PCs.

Directory Files	Description
NET_PHN.RUL	Compiled Personal Call Handler Rules
*.RU	Exported Personal Call Handling Rule
*.RUI	Imported by Net Phone upon startup only when a rule of the same name does not exist in the compiled set of rules (NET_PHN.RUL). Thus, when this file exists and the user made changes to this rule, the user can revert back to the original operation by deleting the current rule in Net Phone, then stopping and restarting Net Phone. This file is renamed to *.RU once imported.
*.RU1	When the last character of the file name extension is a '1' (number), the file is always imported, overwriting an existing rule. The file is deleted once imported.
*.RUO	When the last character of the file name is 'O' (letter), the file is always imported upon startup, overwriting an existing rule. The file is not deleted.
*.RU0	When the last character of the file name is '0' (number), the file is only imported upon startup if the compiled rule file is missing (NET_PHN.RUL).

Advanced Configuration

Some items of the configuration can be changed but are not always present in the Administration interface available to the user. This includes an ability to create a Post Call Survey type of operation, using Extra Call Info items as part of the conditions for creating Personal Call Handling rules and some hidden parameters that should not be readily changed except as part of the initial setup.

Post Call Survey

For Net Phone to conduct a post call survey, a call variable labeled either PC_DEST or ~PC_DEST, needs to be created that contains an extension number where the call will be transferred when and only if the Net Phone hang up button is pressed. Automatically the call will be transferred to the destination defined. This Extra Info field can be created and a value entered using Call Router, Voice Assistant and any Net Phone.

Example

A user would like to have selected calls automatically move to another location when the call is finished. This could be for a Post Call Survey or it could be for an assistant to collect more detailed information. In this example, the agent uses an assistant to collect more details from the call and wants to send the call to extension 1027.

- Create a User-defined Action of the type Modify Call Information and name it Post Call Followup, choose the Extra Info option and enter a Field Name: PC_DEST and a Value: 1027.

- Create a Programmable Button by right-clicking on a blank button, choose the colors and enter a Label, in this case I will use FollowUp. Choose an Action: User Defined Actions and then select your action Post Call Followup.

- The user now can handle a call and if post call followup is needed, press the FollowUp button and when he ends the call by pressing F12 or clicking key, the call will automatically transfer to extension 1027, his assistant.

Using Extra Information in Personal Call Handler Rules

The Personal Call Handler supports the use of Extra Information when the triggering event is either Call Ringing or Call Answered. The only choice offered in the pull down list is CallerID Name. Additional fields can be inserted by typing the name in the entry box. The syntax for the parameter must match the field exactly with that used within TOSHIBA. Following is a list of field names that can be entered into the Personal Call Handler Extra Info field.

Extra Info Field Name	Description
Account	Account code attached to the call
ACDAGT	ACD agent's name
ACDAGTN	ACD agent's code (number)
ACDGRP	ACD group's name
ACDGRPN	ACD group's number
CalledID	Name of called number (DID/DNIS Name)
CalledIDNum	Number called (DID/DNIS number)
CallerID	CallerID/ANI name
CallerIDNum	CallerID/ANI number
CALLPRIORITY	Priority of call within ACD
LastRedir	Last redirected extension number
PC_DEST or ~PC_DEST	Post call survey destination
PREFAGENT	ACD preferred agent's code (number)
~RECFNAME	Tracer/ACR recording file name for this call

~ When a tilde is the lead character in an Extra Info field name, that field cannot be edited and will not display in the Extra Info screen.

Example

The Net Phone user may want a special alerting tone whenever a call rings when the caller has selected or indicated to the system the call should be directed to specific agent. In this case, we want to play the Whistle WAV file for this alert function. Thus, we would create a new Personal Call Handling Rule:

- Triggering Event: Call Ringing

- Call Type: Any

- Phone State: Any

- CallerID Number: none Required

- Extra Info: PREFAGENT, Is Present

- Account Code: none Required

- Action (Immediately): Blow Whistle (Action defined to Play WAV file previously created)

- Action (After 'x' seconds): none

Editing .INI Files

Editing the .INI files can change a number of advanced configuration settings. These files contain configuration information, some of which is dynamically written by the application, some are set using the Admin tools on the Main Menu, and others are in the background and require manual editing to cause a different behavior. It is recommended that only those lines shown in the following sections be changed without consultation of TOSHIBA Technical Support.

Editing the INI files can change some advanced configuration settings.

- First, you MUST exit the Net Phone program before making the changes. Changes made while Net Phone is running will revert back to their original settings upon exiting Net Phone.

- Use Notepad or other text editor to make the appropriate changes based upon the following descriptions.

- Upon restarting Net Phone, the new settings will take effect.

Editing the AG_COS.INI File (COS)

The most important file on server-based configurations is the Net Phone Class of Service file (AG_COS.INI file). This file not only determines what a Net Phone user can or cannot change on his/her phone but also which configuration files should be used from the server.

Note This file MUST be setup for each group for server-based configuration to operate for that group. Repeat the above procedure for each group.

For each setting =N in this file, the user is not allowed to change that part of the configuration on his/her phone. Also the appropriate configuration file must exist on the server and will be used by the Net Phone.

Item	Config File	Description
Chg_Actions=Y	AGT_PHN.ACS	User-defined Actions
Chg_Rules=Y	NET_PHN.RUL	Personal Call Handler Rules
Chg_StdKeys=Y	NP_KEYS1.INI	1st Bank of Programmable Keys
Chg_PgmKeys=Y	NP_KEYS2.INI	2nd Bank of Programmable Keys

Item	Config File	Description
Chg_BotKeys=Y	NP_KEYS3.INI	3rd Bank of Programmable Keys
Chg_MainSet=Y	AGNT_PH.INI	Main Configuration
Chg_OutLookSet=Y	None	Outlook Link Settings*
Chg_InfoSet=Y	CALLINFO.INI	Extra Info Feature Configuration
Chg_Recording=Y	NP_REC.INI	Record-a-Call Settings
Chg_ACD=Y	ONP_ACD.INI	ACD Feature Settings
ShowMaintOnSplash=N	None	Show maintenance expiration date on splash screen
Chg_AppKeys=Y	NP_AppBs.INI	Optional Application Link Buttons
Chg_Docking=Y	NP_WDock.INI	Screen Docking Configuration
Chg_XtraKeys1=Y	NP_XKYS1.DAT	1st Bank of Extra Keys
Chg_XtraKeys2=Y	NP_XKYS2.DAT	2nd Bank of Extra Keys
Chg_XtraKeys3=Y	NP_XKYS3.DAT	3rd Bank of Extra Keys
Chg_XtraKeys4=Y	NP_XKYS4.DAT	4th Bank of Extra Keys
Chg_XtraKeys5=Y	NP_XKYS5.DAT	5th Bank of Extra Keys
Chg_XtraKeys6=Y	NP_XKYS6.DAT	6th Bank of Extra Keys
Chg_XtraKeys7=Y	NP_XKYS7.DAT	7th Bank of Extra Keys
Chg_XtraKeys8=Y	NP_XKYS8.DAT	8th Bank of Extra Keys

* Settings, once made, can be locked into place by changing this setting to "N".

It is highly recommended that all configuration changes be made on the Administrator's Net Phone and then published to the server. Most of the configuration items can be set up following the Net Phone Settings section of the "Net Phone User's Guide".

Editing the Agnt_Ph.INI File (Net Phone Main)

This configuration file contains many topics, some are controlled using the Preferences Menu settings, some are dynamic and written by Net Phone during its use and others are static and can only be changed by manually editing this file. This section describes those items that need to be manually edited. DO NOT change other items unless instructed by TOSHIBA Technical Support.

Setting the Format of Phone Numbers

Applications some times need a specific format for recognizing phone numbers. Changing the "HypenFormat1" (%H) and "HyphenFormat2" (%J) parameters will define how the dialed number or CallerID/ANI number will be treated when each of these Call Variables. The phone number received (%P) using ANI or Caller ID is typically 10 digits without any formatting.

> [General]
> HypenFormat1=xxx-xxx-xxxx
> HypenFormat2=(xxx)xxx-xxxx

Speed Dial Name

When you dial using a Speed Dial key the label of the key will automatically are attached as the 'name' on that call. To disable this feature set this flag to =N for No.

[General]
SD_UseName=Y

Calls to Act Upon

When you use a Programmable Key with a "User-Defined Action" or a System/PBX Command that action may attempt to affect a call (i.e. Transfer, Divert, etc.). If more than one call is present on the phone, which call should be affected? This CallsToAct value determines which calls and in which order: "T"=Talking, "H"=Holding, "R"=Ringing, and "C"=Clearing.   If for example, you wanted to act on Ringing then holding calls you would set the value to "RH". To disable actions for affecting calls, set the value to =N for None.

[General]

CallsToAct=THR

Message Lamp

On some installations the Red Message lamp (next to the MSG key), may not be desirable as message information is also displayed on the LCD Display. To disable the message lamp, set this flag to =N for No.

[General]

MsgLamp2=Y

Call Logging

Call logging is the process of capturing and writing out call information to a "logging file" at the completion of each call. TOSHIBA Net Phone supports logging as a standard feature, writing out the information to a text file so it can be viewed or imported into other programs or databases. Net Phone's Preferences Setup dialogs provide the user ability to enable/disable call logging and choose the types of calls to be reported. The administrator including the format of the data, its header line, the file name, and whether calls to the primary DN or all DNs on the phone are to be included can change other items.

[Logging]	Settings Definitions
DataHeader=Date&tTime&tDir&t Phone&tName&tDur&tAnswer&t Acct&tType&tNotes&tGUID	DataHeader – Column header for log file. Typically you would use a tab-delimited format.
DataFormat=&D&t&T&t%B&t%H &t%N&t%L&t%S&t%A&t%T&t% X("Notes")&t%X("~CHdbGUID")	DataFormat – Data and format of a data record. Typically you would use a tab-delimited format.
LogFile=CallLog.txt	LogFile – Path and filename of text file where logging will occur.
Enabled=Y[1]	Enabled – Logging feature enabled "Y"es or "N"o
MaxSize=1	MaxSize – Maximum size of log file (in megabytes)
CallType=CO1	CallType – Call types that should be logged: "CO", "A"ll, or "IC
LogSDNcalls=False	Change to =T to log all calls including secondary appearances.

1. These items are now controlled using Setting Preferences (General Tab) and should not be changed by editing this .INI file.

Exporting Call Information

The Exporting Call Information is an action, which can be triggered from a Personal Call Handler rule or by the user pressing a programmable key set with this action. The action first pops up an "Export Information" screen that allows the user to add/review the information to be saved. If any required fields are empty, the user must enter them before being allowed to export. Then when the user presses the Save button, the action formats and exports the information to a text file at the desired location.

The only parameter needed when defining the action is the Path & Filename to which the export should occur. Typically, the target destination will be over a LAN to a system-level PC/database, so it's usually appropriate to have a network drive mapped specifically to the target location (i.e. F:\). Also since exports could be occurring simultaneously from many different PCs, it is recommended to use one of the system variables like &E (your extension number) as part of the filename so that the export filename is unique for each PC – for example: EXT&E.IMP

Export Information requires file-sharing access with Write permissions to the target folder. Users must be able to browse to the target folder and create a file, or Export Information will fail.

The export action can be configured and customized by changing fields in the [Export] section of the Agnt_Ph.INI file. Following is an example configuration.

[EXPORT]	Settings Definitions
RequiredFields=MP	RequiredFields – This parameter is used to designate which fields the user will be required to enter (cannot be left blank) when the "Export Information" screen is presented. The choices of fields includes: M = Main Listed Telephone Number P = Phone number (CallerID or ANI on the call) N = Name (CallerID name) A = Account code D = Destination.

[EXPORT]	Settings Definitions
HideFields=D	HideFields – This parameter is used to designate which fields to hide from the user when the "Export Information" screen is presented. Use this to hide fields your agents do not need to enter. The choices of fields includes: M = Main Listed Telephone Number P = Phone number (CallerID or ANI on the call) N = Name (CallerID name) A = Account code D = Destination. Important: Do not Hide a Required field. Users will be unable to save their information if they cannot enter data into all Required fields. You cannot enter data into a Hidden field.
Line1=@@LOGON,EXT&E,&E Line2=@@LEARN,M,%M,%P Line3=@@DONEIF,SUCCESS Line4=%P,"%N",@@DEF,@@DEF,@@DEF, @@DEF,@@DEF,@@DEF	Line1 - Line4 – Up to 4 lines of text can be written on each export. Line1 through Line4 determine the text output to the target file. These lines can contain text; call variables and system variables to provide all of the static and real-time information needed.
DefAcct= DefDest= DefName=	DefAcct, DefDest, DefName – These will be used as the default Account, Destination, and Name fields shown on the "Export Information" screen if these are not already present on the call.

[EXPORT]	Settings Definitions
AutoModify=Y	AutoModify – When the user has entered information into the "Export Information" screen, it is typically desirable to immediately attach this information to the telephone call in progress. This flag is used to turn on this feature by setting it to "Y" for Yes. **Note** If a "Main Listed #" is entered (and this feature is enabled), this main phone number is then substituted for the Calling number on the call, which typically helps ensure success on subsequent screen-pop attempts.
Path=F:\ File=&E.IMP	Path and File – Default values for the location and name of the Export file. These values are only used if the Export Information Action does not include the path and file parameter.

Editing the NP_Rec.INI File (Recording)

When using OAISYS Tracer or Auto Call Record, a button can appear on Net Phone to show the recording status, offer the ability to start or stop the recording, and to enter a bookmark into the recording record. These are controlled in the NP_Rec.INI file and can be selected during installation if the OAISYS Replay Option were chosen during installation or can be changed later by manual editing. The file contains a list of default bookmarks and each can be changed to meet your needs or additional ones added by adding a line and incrementing the numerical value.

➤ **To Show Recording Status**

To have a button appear on the main Net Phone screen to show the status of Tracer call recording set Recd_ViewStatus to "Y".

[Recording]

Recd_ViewStatus=N

➤ **To Stop/Start Recording**

To make the Record button active to allow the ability to either or both start and stop the recording set the following to "Y". Setting these to "Y" also makes this feature available in System/PBX Commands for creating User Defined Actions.

[Recording]

Recd_Start=N

Recd_Stop=N

➤ **To Enable Inserting Bookmarks**

Net Phone can be used to manually insert bookmarks into the OAISYS Tracer recordings while the call is recording. Change Set_Bookmark to =Y. This setting also makes this feature available in System/PBX Commands for creating User Defined Actions. The lines marked Bookmark1= to Bookmark'x'= provides a naming list for a selection of bookmarks to be inserted. The number of choices can be reduced or increased. Delete lines not needed or add new default bookmarks by incrementing the numerical value accordingly. Replace the text following the '=' character as needed to meet your needs.   These bookmarks can be are presented to the user when the user right-clicks the Record button for making a selection.

[Recording]

Set_BookMark=N

Bookmark1=Important Point

Bookmark2=Listen Here

Bookmark3=Phone Number

Bookmark4=Abusive Language

Bookmark5=Customer Service Issue

Bookmark6=Customer Order

Bookmark7=Confirmation

Some applications may want to create unique buttons for frequently used bookmarks. This can be done by creating a User Defined Action, selecting System/PBX Command, then choosing RECORDBKMARK="Bookmark Text". This button will work independently of the bookmarks defined above, thus the user does not need to have the Record Button on Net Phone, but will require the setting Set_Bookmark=Y. If for example, abusive language is a problem, a button can be created using the Record Bookmark action and replacing "Bookmark Text" with "Abusive Language". When the user presses this button this bookmark is inserted into the recording record.

Editing the ONP_ACD.INI File (ACD)

This file controls the ACD features allowing or disallowing the use of ACD keys on the Net Phone. These controls define a set of functions for use with ACD including the ability for the ACD Supervisor to login and take calls or not take calls.   The default setting of this configuration file is highly dependant upon the PBX that this Net Phone is connected.

[ACD]	Description
Enabled=N	Set this to =Y to enable this for PBX ACD function or to =C for CTS (TOSHIBA) ACD functions.
SetWrapUpCOS=N	Set this to =Y to allow users to control the ACD Wrap feature.
3rdLoginCOS=N	Set this to =Y to allow this Net Phone to be used to Login or Logout other ACD agents. This allows an application such as TASKE to manually login and logout agents.
ACDLCDenabled=Y	Will display ACD messages when =Y.
PDNenabled=Y	Net Phone will only look for calls on the PDN when set to =Y. Will look for calls on all DNs when =N.
MakeUnavailable=N	Does not matter.
ACD_RingOnLCD=Y	Displays ringing call on LCD display when =Y.
ACD_SuperRcvCalls=N	Does not matter. This is controlled while logging into or out of ACD from Net Phone itself.

Editing Chat_COS.INI File (Chat)

The Class-of-Service INI file has the following settings that can be changed using a simple text editor.

[COS]	Settings Definitions
EnableDND_COS=N	Set to =Y to enable the use of a DND function.
SendBroadcastMsgs=N	When set to =Y this user is capable of sending a broadcast message.
ShowEveryoneGroup=N	When set to =Y this user will have a group that shows everyone on the system.
AddNewGroup=N	When set to =Y, this user can create new groupings of users.

Open Architecture Interfaces   6

The Open Architecture provides for integrating applications within Net Phone, such as the Personal Power Dialer or Chat as well as provides enabling links for other programs running on the PC.

The Net Phone is specifically designed to cooperatively work with many different Windows applications. This allows you to do many different things including:

- dialing from other applications.
- automatically screen pop a contact database when a call rings in.
- automatically open call journals to take notes on a call.
- beep your pager when an important call is ringing.
- Log call activity for a permanent record.

Following are a list of the major interfaces provided in Net Phone to integrate with other programs:

- TAPI Dialing Interface – This allows TAPI enabled applications, for example Goldmine 4.0, to dial calls using Net Phone.
- DDE Command Interface – Non-TAPI applications can use this feature to dial and answer calls.
- Command File Interface – For applications that don't have TAPI or DDE capabilities, this interface provides another alternative to dial and answer calls.
- OLE/COM Interface – Net Phone is an OLE server and as such supports a number of Methods that other applications can use to perform actions like to dial and answer calls.
- Outlook Phone Link – Microsoft Outlook is a powerful contact management program with which Net Phone works very closely.   This requires the installation of the Outlook Link application.

Note Toshiba reserves the right to make changes (including changes, additions, and deletions) to these open architecture interfaces without notification. The information in this section cannot be guaranteed to be 100% accurate and some commands may not work with all PBXs.

Registry Entries

To help other applications know if and where TOSHIBA Net Phone is installed on a PC, the following registry entries are provided:

HKLM\SOFTWARE\Computer Telephony Solutions\NetPhone\install_path (C:\Program Files\Toshiba\NetPhone)

HKLM\SOFTWARE\Computer Telephony Solutions\NetPhone\exe_path (C:\Program Files\Toshiba\NetPhone\netphone.exe)

Companion Applications Suite

The Net Phone has a powerful "open architecture" capability that allows companion applications to be installed to extend the features and functions of Net Phone. These companion applications inherit the look-and-feel of Net Phone so they act as if the are "part of the Net Phone".

Many companion applications have already been developed including: "Call History", "Extension Directory", "Personal Directory", "Extra Buttons" and an "Integrated Web Window".   Plus more companion applications will be provided in the future.

When a companion application is installed, one or more additional Options Buttons will appear at the bottom of the main Net Phone screen.   These buttons provide the access to the companion application for the user. The companion applications rollout from and dock to the bottom of the main Net Phone screens.

Configuration

The appearance and configuration of these buttons is setup and controlled by registry entries. Please contact Technical Support for details before adding an application not specified in the Installation File.

Open Architecture Links

DDE Command Interface

The TOSHIBA Net Phone provides a DDE interface so that other programs can be setup to send commands to dial, answer, and hang-up calls plus other capabilities. This is quite useful, for example, when using a PIM or contact manager program like Commence or DayTimer Organizer (or any program that supports DDE dialing) to look up and dial a phone number.

This DDE interface requires the following:

Application Name:	AGNTPLUS
Topic:	SYSTEM
DDE Execute String:	<Command> See below for available commands.

Call Control Commands

Dial Call	To dial an extension or outside phone number
Formats:	1) DIAL, "Phone Number", "Name", "Account" 2) [DIAL, "Phone Number", "Name", "Account"] 3) [DialNumber ("Phone Number", "Outside Number", "name", "account")]
Where:	Phone Number = number to be dialed Name = Name of person (for outside calls only) Account = account number to attach (for outside calls only)
Answer Call	Answer the oldest Ringing or Holding call.
Formats:	1) ANSWER 2) [ANSWER] 3) [AnswerCall (" ")] 4) ANSWERCALL,<CallID> Answer a specific call.
Where:	
Hang Up	Hangup on a call.
Formats:	1) DropCall 2) [DropCall ( )]
Where:	

Divert Call	Send a ringing call to another destination.
Format:	DIVERT, "CallID","Phone Number","Mbox"
Where:	CallID = PBXCall ID of call, or if "" then Longest Ringing call will be assumed. Phone Number = Inside or Outside phone number, Outside must have a comma – if comma is first , use Trunk Access Code programmed in Net Phone. Mbox = Voice Mailbox extension if call is going to V-mail.
Modify Call	Change or attach info to an Outside call.
Format:	MODIFY, "CallID", "Phone Number", "Name", "Acct"
Where:	CallID = PbxCall ID of call. Phone Number = Outside phone number. Name = Outside number's name. Acct = Account number to be attached to the call.
DSS Call	Dial or XFR call (depending on whether the phone is on a call)
Formats: Outside Calls Internal Calls	1) DSS, KEY, "Phone Number", "Name", "Acct", XfrType 2) DSS, KEY,"Ext #", "Mbox","", XfrType
Where:	Phone Number = Outside phone number. Name = Outside number's name. Acct = Account number to be attached to the call. Ext# = Extension number. Mbox = Voice Mailbox extension if call is going to V-mail
	XfrType = 0 -- Allow transfer to be announced (use Centrex if outside to outside) = 1 -- Do immediate (Blind) transfer = 2 -- Transfer to Hole (IC destinations only) >= 10 -- Don't transfer (Dial only)
Hold Call	Place a call on hold.
Format:	1) HOLD
Where:	

Dial Feature	To dial a feature code.
Format:	FEAT, "feature code
Where:	Feature code = Your PBX's feature activation code.
Start Recording	To start recording the call using either Auto Call Record or Tracer.
Format:	REC_START, PBX_CallID, Ext#
Where:	PBX_CallID = ID of call to be recorded. If left blank the "Talking" call will be assumed.. Ext# = Extension on call, if blank the Net Phone Ext will be assumed
Stop Recording	To stop recording.
Format:	REC_STOP, PBX_CallID, Ext#
Where:	PBX_CallID = ID of call to be recorded. If blank the existing "Talking" call will be assumed. Ext# = Extension on call, if blank the Net Phone Ext will be assumed.
Add Bookmark	Add bookmark to recording in progress.
Format:	REC_BKMARK, PBX_CallID,BookMarkStr
Where:	PBX_CallID = ID of call to be bookmarked. If blank the existing "Talking" call is assumed. BookMarkStr = Tesst of bookmark. If blank the users extension number is used.
Transfer Call	Transfer a call.
Format:	XFR,"CallID","Phone Number","Mbox",XfrFlag,DNDFlag
Where:	CallID = ID of call to be transferred. If blank the existing "Talking" call is assumed. Phone Number = Inside or outside phone number, outside must have comma – if comma is first, use Trunk Access Code from Dial Plan. Mbox = If CallID is blank, and Mbox is blank, Mbox = Ext number of Net Phone. XfrFlag = "1" – blind Xfr, = 2 – Xfr to Hold, else – Announced. DNDFlag = "Y" for DND override.

Phone Control Commands

Minimize Net Phone Window	Sends the Net Phone window down into the tray.
Formats:	1) MINIMIZE 2) [Minimize ( )]
Where:	
Restore Net Phone Window	Brings the Net Phone window back into its last position on the screen before being minimized.
Formats:	1) RESTORE 2) [Restore ( )]
Where:	
Dial A Feature Code String	Dial a feature code string.
Formats:	FEAT,"Feature Code
Where:	Feature Code = The feature code to be dialed.
Set DND	To turn on or off DND with an optional message.
Format:	SET_DND, DNDnum, Msg
Where:	DNDnum = 0 = DND off, 1 – 20 = Top-line of DND message. Msg = 2nd line of DND message

ACD Commands

Agent Login	Log into an ACD Group.
Format:	ACD_LOGIN, AgentID, Pilot, ForExt, popup
Where:	AgentID = leave blank if not by AgentID, "*" = use last Agent ID used Pilot = ACD group extension, left blank = ALL ForExt = Blank = 1st-party, Non-blank – target 3rd-party extension Popup = Non-blank – means popup Net Phone. If = "L" then also popup the Login/Logout screen.
Example:	ACD_LOGIN,,, = Log me into all my ACD groups
Agent Logout	Log out of an ACD Group.
Format:	ACD_LOGOUT, AgentID, Pilot, ForExt, popup
Where:	AgentID = Leave blank if not by AgentID, "*" = use last Agent ID used Pilot = ACD group extension, left blank = ALL ForExt = Blank = 1st-party, Non-blank – target 3rd-party extension Popup = Non-blank – means popup Net Phone. If = "L" then also popup the Login/Logout screen.
Set Wrapup	End or set a wrapup time.
Format:	ACD_WRAPUP, AgentID, TimeSecs
Where:	AgentID = Leave blank if not by AgentID, "*" = use last Agent ID used TimeSecs = If blank or zero – it will "Clear Wrapup", If non-zero it will set the agent state to Wrapup (WNR) for this amount of time.
Monitor Call	Monitor a call on this extension.
Format:	MONITOR_CALL, Ext#
Where:	Ext# = Extension of phone on a call
Add Me	As Agent Help Supervisor for this extension
Format:	ADD_TOCALL, Ext#
Where:	Ext# = Extension of phone on a call

Other Commands

Run Action	To run a Net Phone User Defined Action.
Format:	DO_ACTION, ActionName
Where:	ActionName = Name of user-defined action to be run
Copy Info	To copy information about this call into Windows Clipboard.
Format:	CLIP_CALL, CID, FieldName, CallStatus
Where:	CID = leave blank to use 'CallStatus' or Net Phone's 'Most Likely FieldName = Name of field to be read - "CID", "CallerID", "CallerIDNum", "CallStatus ", "Account" are 'standard' fields, but any 'extra-info' field can also be read. CallStatus = Only used if CID blank, find first call matching these types "T"alking, "R"inging, "H"olding, or "C"learing. Note: If no calls match, it will put a Null on the clipboard.
Example:	CLIP_CALL, , CID, "T" = Return the Call ID of the first "T"alking call.
Set Info	Set information value on a call.
Format:	SET_INFO, CID, FieldName, "FieldValue", CallStatus
Where:	CID = Net Phone's Call ID for the desired call. This could be provided using the %I variable. Or leave blank (" ") if you want to use CallStatus or Net Phone's most likely call. FieldName = Name of the field to be set – "CallerID", "CallerIDNum", "Account" are standard fields, but any "extra-info" field can also be set. FieldValue = The Info string that is to be attached. CallStatus = Only used if CID is blank. Find first call matching these types "T"a.lking, "R"inging, "H"olding, "C"learing. However, this this field is also blank, Net Phone will use the mostly likely call.

System Command	Execute a system/PBX command.
Format:	SYSTEMCMD, Command String
Where:	Command String = Command string and parameters to be performed. See PBX/System commands in User-Defined Actions of the Net Phone User's Guide.
Calendar Appointment	Outlook Calendar sends an indication whenever the appointment status is changed. Typically, these will occur when an appointment starts and again when it ends. This command could also be used by other applications to send information to Net Phone. Use the %OC token in a User-defined Action to access the information.
Format:	CALSTATUS,BusyStatus,Start,End,|Subject|,Importance,|Location|,RemindBefore
Where:	BusyStatus = 0 (Free), 2 (Busy), 3 (Out of Office) Importance = 0 (Low), 1 (Normal), 2 (High)
Example:	CALSTATUS,2,8/18/2005 4:12:00 PM,8/18/2005 4:42:00 PM,|Staff Meeting|,1,|Tempe|,15
Calendar Reminder	Outlook Calendar sends an indication relating to the reminder of an appointment. This command could also be used by other applications to send information to Net Phone. Use the %OR token in a User-defined Action to access the information.
Format:	CALREMIND,BusyStatus,Start,End,|Subject|,Importance,|Location|,RemindBefore
Where:	BusyStatus = 0 (Free), 2 (Busy), 3 (Out of Office) Importance = 0 (Low), 1 (Normal), 2 (High)
Example:	CALREMIND,1,8/19/2005 10:25:00 AM,8/19/2005 10:30:00 AM,|Meeting|,1,|Home|,5

Command File Interface

Net Phone also supports all of the above commands through a 'command file' interface so that programs that don't have DDE capabilities can send commands if they can simply create and write to a TXT file. The Net Phone monitors its "\REQ" subdirectory for command request files to appear with the filename <fname>.REQ or an <fname>.RER. It will then open the file and read one line for a command (in the format above), attempt to execute the command, and then delete the command file.

For example, if you create a file called "MY_CMD.REQ" (in the "\REQ" subdirectory) that contains one line containing the text string: DIAL, "496-9040", Net Phone will detect this file and execute this command, dialing the phone number "496-9040".

OLE / COM Interface

The TOSHIBA Net Phone also supports many of the above commands plus some additional commands through an "OLE interface" so programs that support OLE can call methods directly.

In VBA script, the script code would look similar to the following example to "Answer" a call.

Dim ApNet As Object

Dim Suc As Integer

Set ApNet = New AgntPlus.cPhone

Suc% = ApNet.Answer( )

Call Control Commands

Answer Call	Answer the first ringing or holding call.
Format:	Answer ( ) AnswerCallID (PBX_CallID) Answers a specific call, ringing or holding.
Where:	PBX_CallID = PBX CallID as represented in '&B'.
Dial Call	To dial an extension or outside phone number.
Format:	Dial (Num, Name, Account)
Where:	Num = number to be dialed Name = Name of person (for outside calls only) Account = account number to attach (for outside calls only)
Hold Call	To place a call on hold.
Format:	Hold ( )
Where:	
Hang Up	Hangup on a call.
Format:	Hangup ( )
Where:	
Divert Call	Move a ringing call to another destination.
Format:	Divert (ID, Num, Mbox)
Where:	ID = " " then longest ringing call will be assumed Num = Inside or outside phone number, outside must have comma – if comma is first, use Trunk Access Code programmed in Dial Plan. Mbox = If ID is blank, and Mbox is Blank, Mbox = Ext number of Net Phone
Transfer Call	Transfers a call to a specific destination.
Format:	Transfer (CID, Num, Mbox, XfrFlag, DNDoverride)

Where:	CID = Net Phone's Call ID for the desired call (i.e. this could have been provided to the app using an event from Net Phone with %I variable). Or leave blank (" ") if want to use the call on which you are presently "Talking".
	Num = Inside or outside phone number, outside number msut have a comma – if comma is first, use Trunk Access Code from the Dial Plan.
	Mbox = Mailbox number to receive the call if "Num" is V-mail number.
	XfrFlag = 1= Blind Xfr, 2 = Xfr to Hold, else - Announced
	DNDoverride = "Y" for DND override (if available)
Example:	Transfer ("" , 2502, 1010, "", "") = Transfer call to V-mail extension into V-mailbox "1010".
Start Recording	To start recording the call using either Auto Call Record or Tracer.
Format:	RecordStart (PBX_CallID, Ext#)
Where:	PBX_CallID = ID of call to be recorded
	Ext# = Extension on call, if blank the Net Phone Ext will be assumed
Stop Recording	To stop recording.
Format:	RecordStop (PBX_CallID, Ext#)
Where:	PBX_CallID = ID of call to be recorded
	Ext# = Extension on call, if blank the Net Phone Ext will be assumed.
Record a Bookmark	Add a bookmark to the recording in progress.
Format:	RecordBkMark (PBX_CallID, BookMarkStr)
Where:	PBX_CallID = ID of call to be bookmarked. If blank the existing "Talking" call will be assumed.
	BookMarkStr = Text of bookmark. If blank the user's extension number will be used.

Phone Control Commands

Set Phone View	Sends the Net Phone window down into the tray or brings it back to its normal view on the screen.
Formats:	SetPhoneView (ViewType)
Where:	ViewType = 0 = Normal , 1 = Minimized
Dial Feature Code	Dial a feature code string.
Formats:	DialFeature (FeatStr)
Where:	FeatStr = Feature code of the PBX.
Set DND	To turn on or off DND with an optional message.
Format:	SetDND (DNDNum, Line2)
Where:	DNDnum = 0 = DND off, 1 – 20 = Top-line of DND message. Line2 = 2nd line of DND message.

ACD Agent Commands

Agent Login	Log into an ACD Group.
Format:	ACD_LogIn (AgentID, PilotExt, PhoneExt, PopUp)
Where:	AgentID = Leave blank if not by AgentID, "*" = use last Agent ID used PilotExt = ACD group extension, left blank = ALL PhoneExt = Blank = 1st-party, Non-blank – target 3rd-party extension PopUp = Non-blank – means popup Net Phone
Agent Logout	Log out of an ACD Group.
Format:	ACD_LogOut (AgentID, PilotExt, PhoneExt, PopUp)
Where:	AgentID = Leave blank if not by AgentID, "*" = use last Agent ID used PilotExt = ACD group extension, left blank = ALL PhoneExt = Blank = 1st-party, Non-blank – target 3rd-party extension PopUp = Non-blank – means popup Net Phone
Monitor Call	Monitor a call on this extension.
Format:	MonitorCall (Ext#)
Where:	Ext# = Extension of phone on a call
Add Me	As Agent Help Supervisor for this extension.
Format:	AddMeToCall (Ext#)
Where:	Ext# = Extension of phone on a call.

Other Commands

Perform Action	To run a Net Phone User Defined Action.
Format:	PerformAction (ActName, ActType, ActParm)
Where:	ActName – Can be the label on a key. ActType – Number of action: 1 = dial feature, 2=dial number; 3=OAI command; 5=User-Defined action, 7=Pop URL; 8=Run Pgm ActParam -- Parameter for the selected action (i.e. "4969060" for phone number).
Run Action	To run a Net Phone User-Defined Action.
Format:	PerformUserAction (ActionName)
Where:	ActionName = Name of User-Defined action to be run
Get File	Retrieve a file from Server.
Format:	GetFile (FromPath, ToPath)
Where:	FromPath = Complete path name of file to retrieve. ToPath = Complete path name folder to place file.
Get Info	This can be used to read a number of different values of information. Returns a string value.
Format:	GetInfo (FieldName)

Where:	FieldName = Value to be read back including:
	  AGENTID – present setting of the last used AgentID
	  EXEPATH – path to where the NetPhone is running
	  DND – setting of DND feature (" " = off)
	  FWD – setting of FWD feature (" " = off)
	  EXTNAME – PBX username associated with NetPhone
	  PDN – Primary Directory Number for NetPhone
	  " " – Return PBX Extension Number for NetPhone

Get Call Info	Returns a sting value containing the value of the field designated.
Format:	GetCallInfoField (CID, FieldName, CallTypes)

Where:	CallID = Leave blank if want to use 'CallTypes FieldName = Name of field to be read -- "CID", "CallerID", "CallerIDNum", "CallStatus ", "Account" are 'standard' fields, but any 'extra-info' field can also be read. CallTypes – Only used if CID blank, Find first call matching these types "T"alking, "R"inging, "H"olding, "C"learing. Note: If no calls match, a Null string will be returned.
Example:	GetCallInfoField (" " , Account, "R") = Return the Account number of the first "R"inging call
Copy Info	Copy Info about call into Windows Clipboard – Copies a string value containing the value of the designated field into the clipboard.
Format:	ClipCallInfoField (CID, FieldName, CallTypes)
Where:	CID = leave blank if you want to use "CallTypes" or Net Phone's most likely call. FieldName = Name of field to be read – "CID", "CallerID", "CallerIDNum", "CallStatus", "Account" are standard fields, but any extra-info field can also be read. CallTypes = Only used if CID is blank. Finds first call matching these types – "Talking", "R"inging, "H"olding, "C"learing. If no call matches, it will place a NULL on the clipboard.
Get Feature List	Returns bit list (long integer) of enabled features as follows:
Format:	GetFeatBitList ( )
Where:	SHOWRECORD = &H1& -- allowed to show "Recording-in-progress" indication STARTRECORD = &H2& -- allowed to manually start a Recording STOPRECORD = &H4& -- allowed to manually stop a Recording ACDENABLED = &H8& -- allowed to access ACD features (login, logout) ACDLOGIN3RD = &H10& -- allowed to access ACD features for 3rd parties (that is other phones). Note: The ACDENABLED bit must also be set.

Set Info Field	Set information field on a call.
Format:	SetCallInfoField (CID, FieldName, FieldValue, CallStatus)
Where:	CID = Net Phone's Call ID for the desired call (i.e. this could have been provided to the app using an event from Net Phone with %I variable). Or leave blank (" ") if you want to use CallStatus or Net Phone's most likely call. FieldName = Name of field to be Set -- "CallerID", "CallerIDNum", "Account" are 'standard' fields, but any 'extra-info' field can also be set. FieldValue = The Info string that should be attached. CallStatus = Only used if CID blank, Find first call matching these types "T"alking, "R"inging, "H"olding, "C"learing. If no calls match this request, a NULL string is set.
Example:	SetCallInfoField ("" , "Notes", "Testing","T") = Set the Notes field to "Testing" on the call in which I am "T"alkingl.
OutLook Lookup	Lookup phone number in Microsoft Outlook.
Format:	Outlook_LookUp (CID, SearchType, SearchFor, NoMatch, ExactMatch, MultiMatch)
Where:	CID = Net Phone's Call ID for the desired call (i.e. this could have been provided to the app using an event from Net Phone with %I variable). Or leave blank (" ") SearchType = "P" for phone number SearchFor = Phone number string NoMatch = What to do if no matches found ExactMatch = What to do if Exact (single) match is found MultiMatch = What to do if multiple matches are found
Example:	Outlook_LookUp ("", "P", "4804969040", "U", "C", "U")
System Command	Perform a PBX/System command.
Format:	PerformSystemCommand (CommandStr)
Where:	CommandStr = Command and parameters to perform. See Net Phone User Guide's User-Defined Actions for details of commands available.

Send Chat	Send a Chat message using TOSHIBA chat client.
Format:	SendChat (sExt, sName, sMsgType, sMsg, sSendOption)
Where:	sExt = The Extension number of the person to chat with. If you leave this blank, the main Chat window will pop up and allow you to manually select the person
	sName = (don't need to supply if sExt is provided) – The name of the person to chat with. If you leave this blank, the main Chat window will pop up and allow you to manually select the person
	sMsgType = Future feature – leave blank for now
	sMsg = Message to be sent
	sSendOption = "I" - Immediate Message -- send message immediately or "C" (or blank) -- Canned message -- type message into user buffer but wait for user to press SEND
Example:	SendChat ("1001", "", "", "Help! I have an abusive call", "I")
General Command	General (or DDE) Command – this can be used to execute any of the DDE commands described earlier in this document.
Format:	GenCmd (CommandStr)
Where:	CommandStr = Command and parameters to perform.
Example:	GenCmd ("ACD_WRAPUP,,30") = Set Agent state to Wrapup for the next 30 seconds.
	Note: This command is a low-level command that will allow specialty applications to operate.

Trouble Shooting

A

Installation Problems

Cause(s):	Solution(s):
TAPI Service Provider Not Matched	
Net Phone searches the installed list of TAPI Service Providers for any entry containing the words "Net Server" The error appears when Net Phone is unable to match the specified text to any TAPI Service Provider.	Ensure the TOSHIBA Net Server TSP is installed and appears in the Telephony section of Control Panel.
	Ensure the TAPI Service Provider entry in Net Phone Setup | Preferences | Main contains a valid TSP name.
	Re-install Net Phone with the latest version available to your maintenance plan from Toshiba FYI.
Net Phone Cannot be Installed over the Network	
Network permissions may prevent users from executing files, or the setup file may not be available on a network share.	Check the permissions for the remote user and ensure they have Read and Execute on the setup file.
	Make sure the setup file is available in a folder or device shared to the network.
	Contact the local Network Administrator for additional assistance.

TAPI Service Provider Problems

Cause(s):	Solution(s):
Couldn't Resolve Hostname	
The hostname in the configuration dialog is misspelled or does not exist. DNS name resolution may be configured incorrectly.	Check the spelling of the hostname. Ping the Net Server by name. If this fails, try pinging by IP address. If the ping by name fails but the ping by address works, contact the Network Administrator to resolve the DNS problem. Or, use the IP address instead of the hostname.
Connection Failed to Host	
Net Phone contacted the PC listed in hostname, but there was no response from Net Server.	Make sure Net Server is running on the target PC. If connecting through a firewall, ensure TCP port 8767 is open for two-way communication.
Invalid Access Password	
The extension is already listed in Net Server Admin with another password.	Check the Client Password in Net Server Admin. This feature prevents malicious users from assuming control of other keysets without permission.
TAPI Service Provider Not Operational	
Windows 98 SE supported the Windows Automatic Update feature. In some cases, Windows Update installed a new version of the TAPI Server on the PC. This updated version was incompatible with the Net Phone TSP.	Check the date on \Windows\System\TAPISRV.EXE – if it is 5/99, it is incompatible with the Net Phone TSP. Current versions of Net Phone Setup automatically install the correct version. Microsoft Windows Update now also installs a newer, compatible version.

Cause(s):	Solution(s):
Software Key Feature Points Unavailable	
The copykey is not installed on Net Server PC.	Attach the hardware key to the Net Server PC parallel port and click Re-Read Copy Key on Net Server Copykey tab.
The copykey does not contain Net Phone licenses, or all available Net Phone licenses are currently in use.	View the number of points available on the key using the Copykey service entry on the Net Server Services tab. DFES determines the number of Net Phones allowed. Net Phone requires 22 DFES units per copy. Other applications may also use DFES units, such as DSS and Chat. If other users are running copies of these programs without permission, those applications may be using feature units intended for Net Phone users. You may need to add additional points to the key by purchasing additional software licenses.
Service Unavailable	
Net Phone connected to Net Server, but Level 2 OAI Service has not yet logged into Net Server. OAI connection may be down.	Check Net Server and Level 2 OAI. Make sure Level 2 OAI is communicating with the PBX.
Extension Already Exists	
Problem occurs because Net Phone is attempting to connect with an extension number that already exists in the db. Name and Password must match exactly for this to work. This feature prevents people from using Net Phone to take over other phones (intentionally or accidentally.)	Install Net Server Administrator, and either remove the Client Extension record, or copy the name and password to the PC client(s).
Could Not Add New Client to Database	
The username is already listed in the Net Server Database with another extension.	Change the username, or delete the existing user from Net Server Administrator.

Configuration Problems

Cause(s):	Solution(s):
Net Phone is Running in Demo Mode	
May not be connecting to NetServer.	Verify NetServer is operational and Net Phone is pointing to the server's name or IP address.
May not have enough feature points to run Net Phone.	Check the available feature points on Net Server. Make sure there are sufficient licenses available for the number of active copies of Net Phone.
If you received a feature point upgrade, the Copy Key Upgrader may not have accepted the enabler code.	Copy Key Upgrader didn't add all of the feature points. Check that you are using the latest version of Net Server. You can also download a Copy Key patch file for Net Server 3.1.128 or lower. Apply the patch or install a current Net Server. Then re-apply the enabler code.
Net Phone Buttons are Transparent	
NetServer could be down.	Verify that NetServer is operational.
You may have the wrong IP address selected for the Net Server.	Verify the server name/IP address in Net Phone.
Some early versions of Net Phone did not install properly.	Reinstall a current version of Net Phone. One can be downloaded from http://support.Toshiba.com.
The color settings may be incorrect.	Try a different color depth (256 colors, true color).
The screen resolution may be interfering with Net Phone.	Try a different screen resolution (640x480, 800x600, 1024x768).
The video driver may not work with Net Phone.	Get the model number of the video board. Check for more current drivers.

Cause(s):	Solution(s):
Net Phone is Dialing an Area Code for Local Calls	
The local Dial Plan Rules are configured incorrectly.	Go to Setup | Preferences | Main and check the local Dial Plan settings. Make sure "Dial Area Code on all Local Calls" is not checked.
The Server Dial Plan Rules are configured incorrectly.	Go to Setup | Preferences | Main and Check Plan next to "Use SERVER Dial Plan." Test local numbers using the Tester. If the numbers are formatted incorrectly, modify the Dial Plan Server settings on the TOSHIBA PC.
None of the Buttons on Net Phone Work	
3rd party call control and/or system level events may not be enabled.	3rd party call control and System Level Events must be turned on in the PBX programming.
Net Phone Drops into the System Tray and Will Not Run.	
You may have the wrong hostname for the NetServer.	Check the hostname: Open Control Panel/Telephony and select the telephony drivers tab. There, select the TOSHIBA Net Server TAPI Service Provider press the Configure button.
Undetermined problem with hostname resolution.	This problem may be resolved by using the IP Address instead of the hostname.

Third Party Out Dialing/Screen Pop Problems

Cause(s):	Solution(s):
GoldMine is Not Dialing Out on Net Phone	
Some early versions of Net Phone could not properly control Goldmine or other 3rd Party TAPI applications.	Use Net Phone 3.2 or higher. Re-install Net Phone with the latest version available to your maintenance plan from Toshiba FYI.
Net Phone Hangs Up when Clicking Anywhere in Goldmine	
The Goldmine TAPI subsystem does not respond properly after initiating a TAPI dial. Clicking anywhere in Goldmine sends a TAPI disconnect to Net Phone, causing Net Phone to hang up the call.	Install TAPI Link and configure Goldmine to use it instead of the Net Phone TSP.
TAPI Outdial is Not Working with Goldmine on Win2000	
The TAPI Service may not allow users to access the service.	Review the Goldmine Application Note for details on allowing PC users to interact with the Telephony service.
Net Phone Will Not Screen Pop Outlook	
Outlook Link is not installed.	Net Phone requires Outlook Link to work with Outlook. Download and install the latest Outlook Link from Toshiba FYI or re-install Net Phone choosing Microsoft Outlook on the screen asking to select an integration option (Step 7 of the Installation instructions). Note: Outlook cannot be running when you install Outlook Link.

Miscellaneous Problems

Cause(s):	Solution(s):
Call History File is getting too big	
The Call History feature logs all calls to a text file.	Call History is logged to a file, by default, the calllog.txt file in the User's Local Settings folder. When the calllog.txt file exceeds the limit defined in the Agnt_Ph.INI configuration file (default size is 1 Mbyte), the calllog.txt file is renamed calllog.prv and a new calllog.txt will automatically be started.
Net Phone Hangs Up After Dialing an Outgoing Call	
Personal Call Handler may have a rule configured incorrectly.	Review the PCH Rules for any that might attempt a Transfer or Disconnect when a call is answered. Also look for any rules that might execute a Transfer or disconnect while the phone is active on another call and a new call arrives.
Net Phone Error using btn32x10.ocx	
IE 5 may not be installed. Net Phone requires IE 5.	Install Internet Explorer 5.0, or re-install Net Phone with the latest version available to your maintenance plan from http://support.Toshiba.com
DLL's may be missing or the .ocx file may not have been registered on install.	Make sure msvcrt40.dll and mfc40.dll are present in <Windows root>\system or \winnt\system32. Run "regsvr32 <systemroot>\<system32>\btn32x10.ocx" from a DOS prompt.
Net Phone Message Light blinks, "No Message to Retrieve" when clicked	
System OAI does not provide complete information on message indicators. Net Phone must track message status internally, and sometimes loses sync with the actual message count.	Restart Net Phone.

This is the last page of the document.