

# **UC for Business Executive Insight for 2010**



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Revision History

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Document No.	Release Date	Change Description
006NEC10-00QRGR	04/13/11	Initial release.

## Table of Contents

<b>Introduction</b> .....	<b>1</b>
<b>Start Executive Insight</b> .....	<b>1</b>
<b>The Executive Insight Interface</b> .....	<b>2</b>
Toolbars .....	2
<b>Phonebook Functions</b> .....	<b>5</b>
Call an Entry from the Phonebook .....	5
Add a New Contact into the Phonebook .....	6
Edit Contact Details.....	6
Delete a Contact .....	6
<b>Presence</b> .....	<b>7</b>
Presence Buttons.....	7
Presence Icons.....	7
Additional Functions Using the Presence Buttons.....	8
Set Presence Profile.....	10
Set an Estimated Time of Return (ETR).....	10
Presence Status .....	11
Add a Presence Note .....	11
Add a New Presence Page .....	11
Rename a Presence Page.....	12
Delete a Presence Page.....	12
Add a Presence Button .....	12
Delete a Presence Button .....	12
<b>Call Functions</b> .....	<b>13</b>
Make a Call.....	13
Answer a Call .....	13
Active Call Icons in the Phone Calls Window.....	13
Transfer a Call Using the Phonebook .....	14
<b>Voice Message Functions</b> .....	<b>14</b>
Play a Voice Message .....	14
Forward a Voice Message.....	14
Delete a Voice Message.....	14
<b>Desk-to-Desk Chat</b> .....	<b>15</b>
Chat Buttons .....	15
Make a Chat Call.....	16
End a Chat Call .....	16

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Answer a Chat Call.....	16
Transfer a Chat Call.....	16
Invite Additional Chat Participants.....	16
Private Chat.....	17
Chat Messages.....	17
Create and Use Templates.....	17
Additional Chat Functions.....	18
Configure the Add-in Options.....	18

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## Introduction

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Executive Insight increases the productivity of virtually every individual in an organization with faster, easier, and more efficient communications. Executive Insight allows Microsoft Outlook users to manage all their communications from within their email application. Users can instantly identify incoming calls, view all historical calls to and from their phone, call contacts (including Microsoft Outlook contacts) quickly and easily, as well as check and process all their messages. This guide provides step-by-step instructions on how to use the Executive Insight product.

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## Start Executive Insight

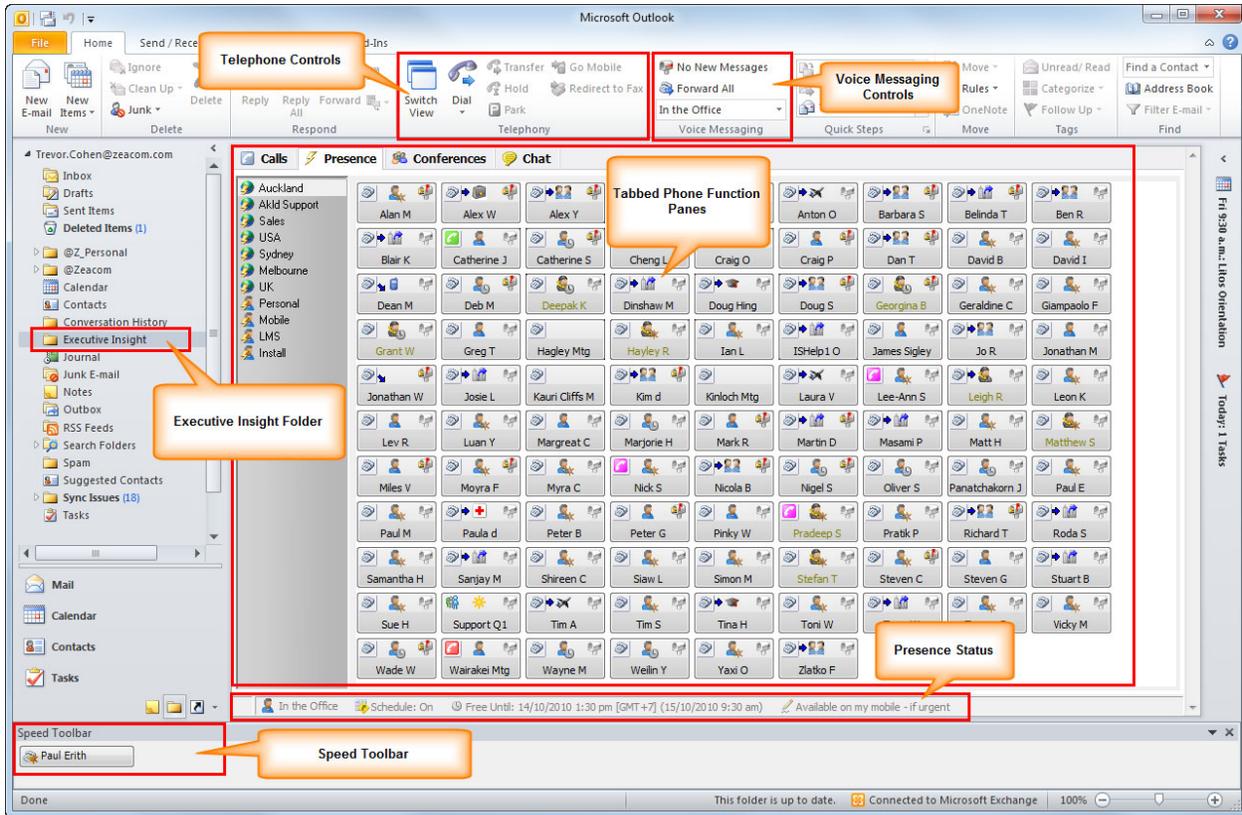
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**Note:** Executive Insight does not automatically start when opening Outlook.

1. In Outlook, click the **Connect** icon.
2. The first time starting Executive Insight, you may be prompted to complete some initial setup using the Setup Wizard.
3. Optional: Set up Executive Insight to automatically start when Outlook is opened.
  - a. From the **File** menu, select **CTI Add-in**.
  - b. Click the **Load on Start** option.
4. Executive Insight creates a folder in the Outlook mail folders named **Executive Insight**. To return to the Executive Insight view at any time, open the **Executive Insight** folder (or click the **Switch View** icon).

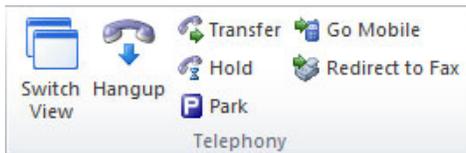
## The Executive Insight Interface



## Toolbars

### Telephony Toolbar

The available Telephony options change dynamically based on the current activity.



#### Icon

#### Description



Toggles between the current and previous view (e.g., Outlook Mail and Executive Insight).



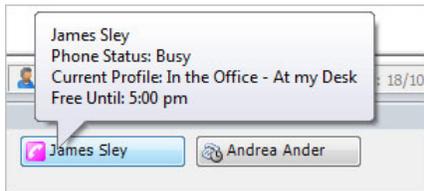
Changes dynamically based on the next logical action:

- Answers a call
- Dials a call
- Hangs up a call
- Plays a voice message.

Icon	Description
	Transfers a call.
	Holds/unholds a call. Hold music plays for the caller while on hold.
	Parks/unparks a call. Hold music plays for the caller while on park, but the line is free for you to make another call.
	Transfers/retrieves a current call to/from the user's mobile phone.
	Redirects an inbound fax call.

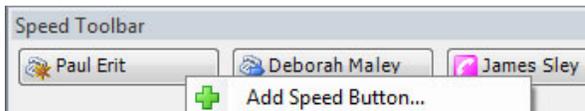
## Speed Toolbar

Speed buttons for frequently used Phonebook contacts can be placed on a Speed toolbar to provide quick dialling and a visual indication of an internal user's Presence status.



## Add a Speed Button

1. Right-click in the Speed toolbar.



2. Select **Add Speed Button**.
3. Using the Phonebook, select the contact name and then click the **Add** button.

## Reorder a Speed Button

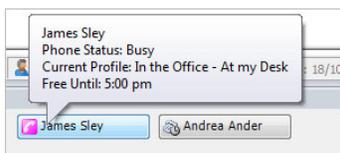
1. Right-click in the Speed toolbar.
2. Select **Reorder Speed Button**, and then drag the position of the buttons in the displaying order list.

## Make a Call Using the Speed Buttons

- Click the contact's Speed button, and then click the contact's phone number or extension.

## View a User's Availability

- Hover the mouse over a contact's Speed button to view the Presence status and ETR (if set).



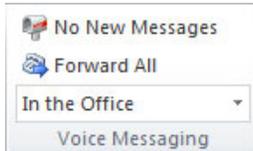
**Request Availability Notification**

- Click the contact’s Speed button and then select either of the following:
  - **Notify Me when [Name] is Back** when the extension is forwarded.
  - **Notify Me when [Name] is Off the Phone** when the extension is busy.

A notification message displays when the contact is back/off the phone.

**Voice Messaging Toolbar**

The voice messaging options change dynamically based on current activity/status.



Item	Description
	Indicates the number of unread messages in the mailbox
	Forwards all calls/cancels the call forwarding, and toggles call forwarding to the mailbox.
	Manually select and set Presence profiles, and optionally set the ETR.

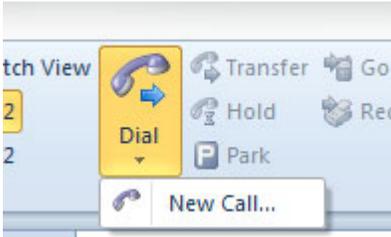
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## Phonebook Functions

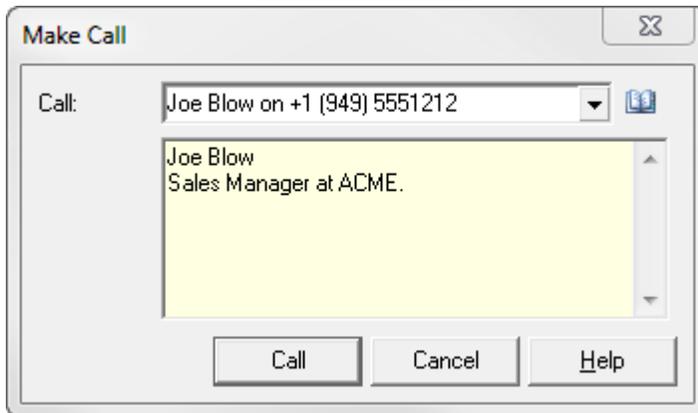
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### Call an Entry from the Phonebook

1. Click the **Call/Dial** button, and then select **New Call**.



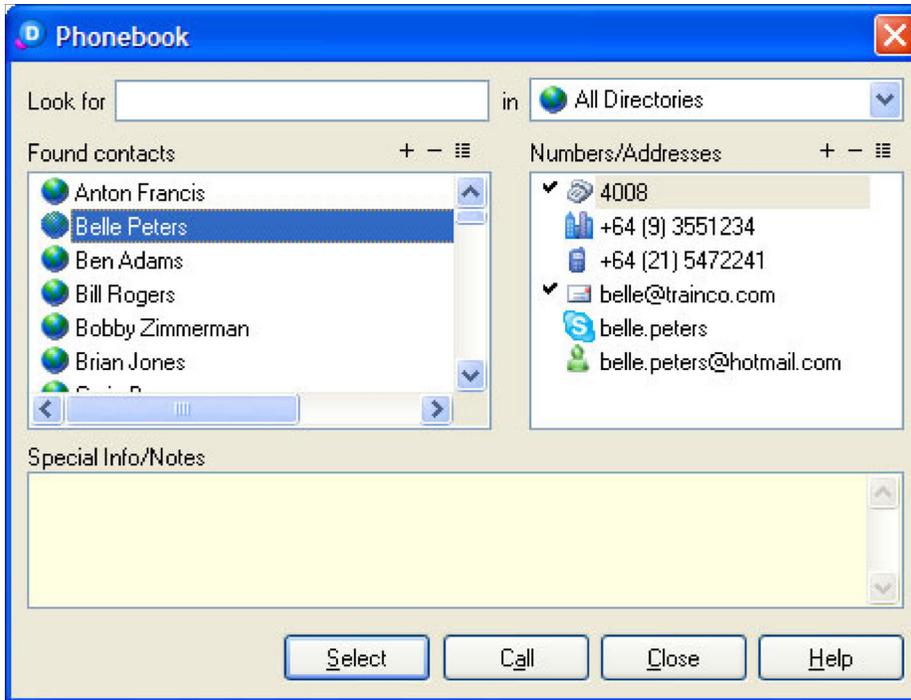
2. In the **Call** field, type the person's name.



3. When the entry displays, click the **Call** button.
4. To add or edit an entry in the Phonebook, click the **Phonebook** icon.

## Add a New Contact into the Phonebook

1. Click the **Phonebook** icon, and then select the directory that the new contact is to be in from the list of directories.



2. In the **Found Contacts** section, click the **Add a New Name (+)** icon.
3. Enter the contact's details, and then click **OK**.
4. In the **Found Contacts** section, select the new contact.
5. In the **Numbers/Addresses** section, click the **Add a New Number** icon.
6. From the **Type** menu, select the number type.
7. Enter the other required details, such as country code, area code, and number. The number must contain a country code, area code, and the actual number; otherwise it cannot be dialed from Desktop.
8. Click **OK**.
9. To add additional contact numbers, repeat steps 5 through 8.

## Edit Contact Details

1. Click the **Phonebook** icon, and then either:
  - Select either the contact name or number, and then click the **Configure this Name/Number** icon.
  - Right-click either the contact name or number, and then select **Properties**.
2. Update the contact's information, and then click **OK**.

## Delete a Contact

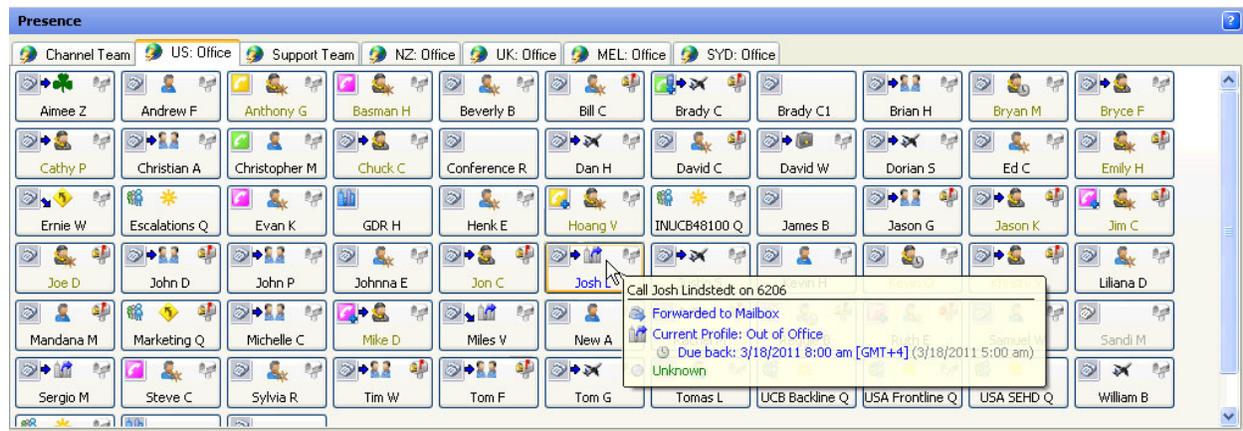
3. Click the **Phonebook** icon, and then either:
  - Select either the contact name or number, and then click the **Delete this Name/Number (-)** icon.
  - Right-click either the contact name or number, and then select **Delete**.
4. When prompted to confirm the deletion, click **Yes**.



**Note:** For New Zealand area codes, the leading **0** is not required.

## Presence

Presence buttons provide real-time visual information on the whereabouts and availability of staff. If an employee is out of the office or in a meeting, the system displays the **Due Back** time. When an employee is away from the desk or on a call, you can request an automatic notification alert for when the employee is available. Use the Presence buttons to call staff. Presence buttons can be grouped and arranged on separate pages.



## Presence Buttons

The following are two types of Presence buttons:



**External** = Telephone numbers outside the office.



**Internal** = Extension numbers in the office. Use the Internal Presence buttons to:

- View the user's extension status by viewing the icons and the status tooltip.
- Perform advanced call functions for an extension by right-clicking the icon. A user's name displays in yellow text if logged into queues as an agent.

## Presence Icons

Icon	Description
<b>Phone Call Types</b>	
	(Gray) Extension is idle.
	(Various colors) Extension is ringing or offering.
	(Various colors) Extension is busy (on the phone).
	Extension is forwarded to another number (internal or external).
	Forwarded to voicemail.
	(Green) Inbound non-queue call.
	(Pink) Outbound non-queue call.
	(Yellow) Inbound queue call (if queuing is installed).
	(Blue) Outbound queue call (if queuing is installed).



Icon	Description
<b>Profiles</b>	
	In the office.
	In a meeting.
	Out of the office.
	On vacation.
	(Gray Head) Agent is logged into the queues.
<b>Voicemail Status</b>	
	No messages.
	One or more standard messages.
	One or more urgent messages.

## Additional Functions Using the Presence Buttons

### Display Additional Contact Numbers

1. In the Active Calls window, click the **Phone Status** icon to display additional contact numbers.



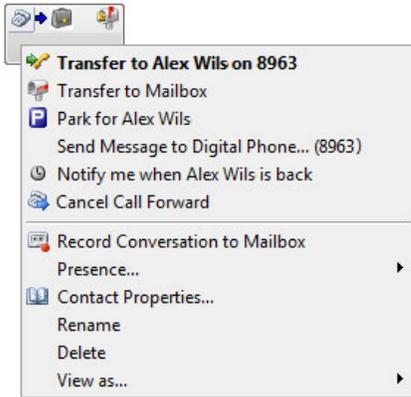
2. From the menu, select the number to call.

**Right-Click a Presence Button for Additional Menu Actions**

- Right-click a Presence button, and then select the preferred action from the menu.



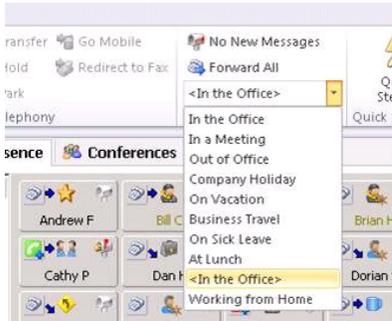
**Note:** The actual options available depend on the type of PBX being used, how the system is set up, and the enabled security permissions. Certain options are also only visible when there is an active call on the extension.



Icon	Name	Description
	Call User on Extension	Initiates a call to the user on the designated telephone number.
	Supervised Transfer to User	Transfers the Active Call to the user's extension, and talk to the user before completing the transfer.
	Blind Transfer to User	Transfers the active call to the user's extension.
	Transfer Call	Transfers the active call to the user's extension.
	Park for User	Holds the active call at the user's extension; the user can then retrieve the call.
	Advanced Park	Parks the active call and pages the user.
	Notify Me when User is Back	A ScreenPop informs when the user is in the office and available to take the call.
	Forward All Calls	Forwards all calls to a specified internal or external number.
	Leave a Voice Message	Record a voice message for the recipient.
	Transfer to Mailbox	Transfers the active call to the user's voicemail.
	Ask User to Call Me Back	The user receives a ScreenPop callback request upon return.
	Record Conversation to Mailbox	The conversation saves to the current user's mailbox (if installed).
	Send Message to Digital Phone	Sends a short text message to the LCD screen of the user's digital phone.
	Select Presence Profile	Changes the user's Presence profile.
	Rename	Renames the Presence button.
	Delete	Deletes the Presence button.
	View As	Changes the Presence buttons' appearance.

## Set Presence Profile

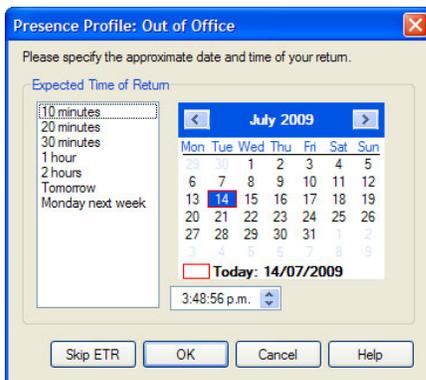
- Use either of the following methods to select a preferred profile:
  - The **Presence** list.
  - Right-click a Presence button, and then select **Select Presence Profile**.



## Set an Estimated Time of Return (ETR)

An Estimated Time of Return (ETR) can be set for the Presence profiles used when you are not available.

1. Select a profile, and then click the calendar function.



2. Select the date of return.

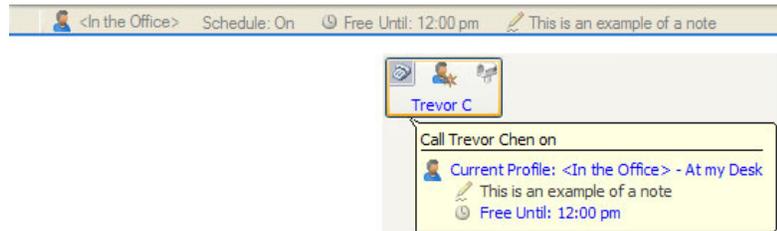


**Note:** Unless the ETR is set as mandatory in the system settings, an ETR can be skipped by clicking the **Skip ETR** button.

3. Select the approximate time of return using the standard times in the left window, or by setting the time using the clock field's up and down arrows.
4. Click **OK** to save the ETR and activate the selected Presence Profile.

## Presence Status

Your Presence status is indicated in the Status Bar. The status information can be viewed by other users via your Presence button or from the Phonebook.



## Add a Presence Note

This section describes how to add a personal Presence note to your Status Bar with additional information about activities and availability to coworkers.

1. In the Status Bar, click the Presence note text **<type Presence note here>**.
2. Type the information, and then press **Enter**. This Presence note remains until it is cleared or a new note is created.

## Add a New Presence Page

Use the Add Presence Page wizard to create either Standard or Dynamic Presence pages:

- **Dynamic** = Automatically lists the contacts for a company or department.
- **Standard** = Manually add and arrange the contacts.



**Note:** Only users with System Administrator rights can add or edit Global Presence pages.

1. Use either of the following methods to start the Add Presence Page wizard:
  - From the **File** menu, select **Add a New Presence Page**.
  - Right-click in the Presence window, and then select **Add a New Presence Page**.
2. Click **Create Personal Presence Page** (only administrators can create global pages), and then click **Next**.
3. Select the type of page to be created. Click either:
  - **Standard Page** to manually add and arrange Presence buttons. If chosen, proceed to the next step.
  - **Automatic Page** = Automatically adds and updates Presence buttons for the selected company/department. If chosen, complete the following substeps.
    - a. Select a company from the listed companies, and then click **Next**.
    - b. Optional: Select **List Only Contacts for the Selected Departments**, and then click **Next**.



**Note:** This step only displays if departments have been defined.

- c. Click the department(s) to display if the department option was selected in the previous step, and then click **Next**.
  - d. Optional: Click the **Create Additional Pages** option, enter the number of buttons per page, and then click **Next**. This option defines a maximum number of Presence buttons per page and automatically creates an additional page when this maximum is reached.
4. Type a name for the Presence page, and then click **Next**.
  5. Verify the settings and click **Finish** to create the Presence Page.

## Rename a Presence Page

1. Use either of the following methods to rename a Presence page:
  - From the **File** menu, select **Rename this Page**.
  - Right-click in the Presence page, and then select **Rename this Page**.
2. Type the new name for the page, and then click **OK**.

## Delete a Presence Page

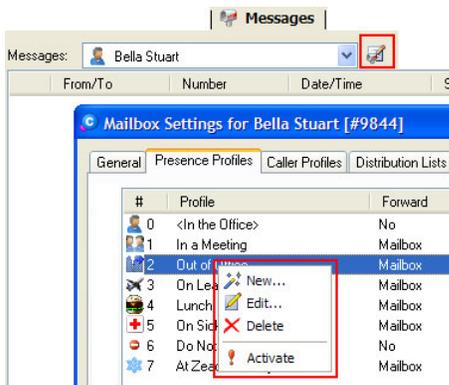
1. Open the page to delete.
2. Right-click in any blank area, and then select **Delete this Page**.
3. When prompted to confirm the deletion, click **Yes**.

## Add a Presence Button

1. Right-click in the Presence page, and then select **Add a Presence Button**.
2. Select either the contact name or the contact number (or drag a contact name or number from the Phonebook to the Presence page), and then click **OK**.

## Delete a Presence Button

- Right-click a Presence button, and then select **Delete**.



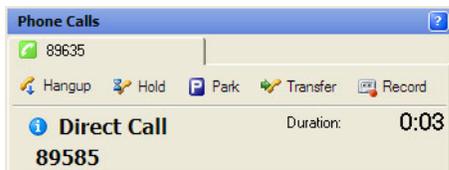
## Call Functions

### Make a Call

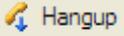
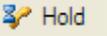
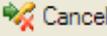
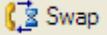
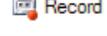
- Use any of the following methods to make a call:
  - Use the Phonebook:
    1. Click the **Dial** icon, and then select **New Call**.
    2. Click the **Phonebook** icon, and then select the preferred contact name/number.
    3. Click the **Call** button, and then press **Enter**.
  - Use the Presence button by either clicking the:
    - Preferred contact's Presence button to call the contact's default number.
    - **Phone Status** icon on the contact's Presence button, and then click the preferred number.
  - Click a contact's Speed button on the Speed toolbar, and then select one of the contact's numbers.

### Answer a Call

- In either the Telephony toolbar or Phone Calls window, click the **Answer** icon.



### Active Call Icons in the Phone Calls Window

Icon	Description
 Hangup	Hangs up the active call.
 Hold	Places the active call on hold.
 Park	Parks the active call.
 Transfer	Either: <ul style="list-style-type: none"> <li>• Transfers the active call to the entered transfer destination number.</li> <li>• Used to conference a third-party into a call.</li> </ul>
 Complete Transfer	Completes the transfer (or hang up the phone).
 Cancel	Cancels the transfer.
 Swap	Swaps the calls (e.g., connects to the original caller or the transfer destination).
 Record	Records the conversation from the active call.

## Transfer a Call Using the Phonebook

1. While on an active call, click the **Dial** icon and then the **Phonebook** icon to open the phonebook.
2. In the **Found Contacts** section, select the contact to transfer the call to.
3. In the **Numbers/Addresses** section, select the contact's number to transfer the caller to.
4. Click the **Transfer** button.

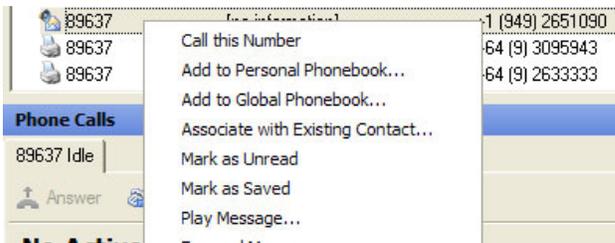


**Note:** To assist the transfer, stay on the line until the party has picked up (otherwise complete the call right away).

## Voice Message Functions

### Play a Voice Message

1. In the Calls window, either:
  - Double-click the voice message.
  - Right-click the voice message, and then select **Play Message**.



2. Click either the **Phone** or **Speaker** icon.
3. Click the **Play** icon.
4. At any time while the message is playing, click the:
  - **Stop** icon to stop the playback.
  - Volume slider to adjust the volume.
  - **Rewind** icon to rewind the message.
  - **Pause** icon to pause the message.
  - **Fast Forward** icon to fast forward the message.
5. To save the message as a .wav file on the PC, click the **Save** icon. Play the file using the Windows Media Player or another compatible multimedia program.

### Forward a Voice Message

Use the **Forward Message** feature to forward the voice message to a mailbox user or a distribution list.



**Note:** If the **Keep a Copy** option is not chosen, the message deletes from the mailbox.

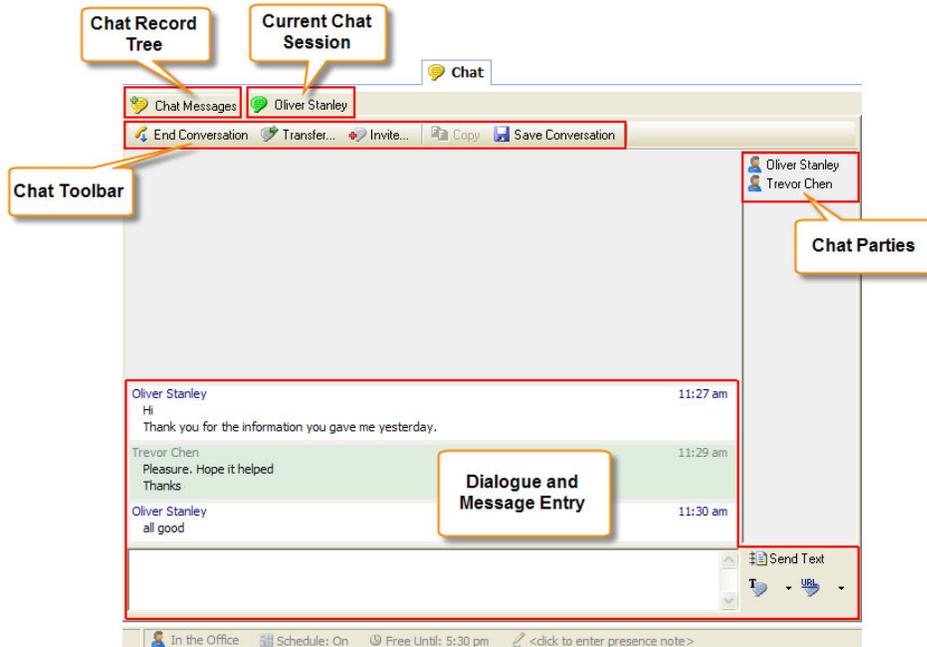
### Delete a Voice Message

Use the **Delete Message** option to delete a voice message.

## Desk-to-Desk Chat

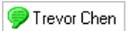
Use Desk-to-Desk chat to have a conversation in real time with other internal users by typing text.

- Click the **Chat** tab to open the Chat window.



## Chat Buttons

Button	Description
Initiate Chat...	Starts a new chat call to either a selected chat user or chat queue.
End Conversation	Ends the current chat call.
Transfer...	Transfers the current chat call to either a selected chat user or chat queue.
Invite...	Invites one or more chat users to join the current chat call. Invitees must accept the invite to join.
Copy	Select the chat window, and then click the <b>Copy</b> button to copy the chat window to the clipboard.
Save Conversation	Saves a transcript of the chat conversation in a text format to a specified disk directory.
Send Text	Transmits the typed text. Alternatively, press the <b>Enter</b> key.
Close	Closes the current chat window.
Chat Templates...	Adds, edits, or deletes standard chat phrases or commonly used URL links
T	A list of saved text phrase. When selected, the phrase is sent directly to the other chat parties.
URL	A list of saved URLs. When selected, the URL is sent as a link directly to the other chat parties.
Send Current URL	Pushes the current Desktop browser URL to the chat recipients.
Trace URL	Automatically sends a series of web page URLs while navigating using the Desktop web browser—toggles this feature on and off.

Button	Description
	Chat conversation—when pink, an outbound chat conversation.
	Chat conversation—when green, an inbound chat conversation.

## Make a Chat Call

1. Click **Initiate Chat** to start a new chat call.
2. Click either **Chat User** or **Chat Queue**, and then select the specific entry from the list.
3. Click the **Chat** button in the window, and a new conversation window opens.
4. In the message text field, type the message and then click **Send Text** (or press the **Enter** key) to transmit the typed text. An outbound chat call shows as waiting in the Active Calls window until the recipient answers the call.

## End a Chat Call

1. Click **End Conversation**.
2. Optionally, click **Save Conversation** to save a transcript of the chat conversation in a text format to a specified disk directory.
3. Click the **Close** button to close the conversation window.

## Answer a Chat Call

1. When a new chat call message displays, either click:
  - **Accept** to answer the chat call, and then navigate to the Chat window by clicking the **Chat** tab.
  - **Show Call** to display the Chat window, and then click **Accept**.



2. In the message text field, type the reply message and then click **Send Text** (or press the **Enter** key) to transmit the typed text.

## Transfer a Chat Call

1. Click **Transfer** to transfer the current chat call.
2. From the list, select a chat user or queue.
3. Optionally, click the **Include Current Chat Conversation** option to give the recipient access to the prior dialogue.
4. Click **Transfer** to complete the call transfer.

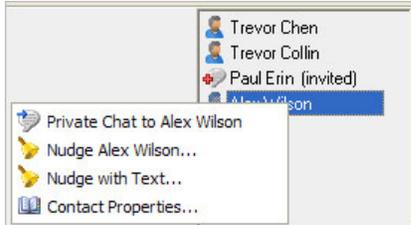
## Invite Additional Chat Participants

1. Click the **Invite** icon.
2. Select one or more chat users to join the current chat call.
3. Optional: Click the **Include Current Chat Conversation** option to give the invitees access to the prior dialogue.
4. Click the **Invite** icon to send the invitations. Invitees must accept the invite to join.

## Private Chat

When there are three or more chat participants, you can have a private chat with a selected participant.

1. Right-click the participant's name.

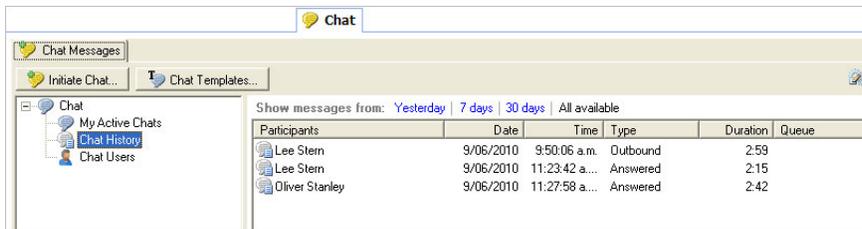


2. From the menu, select **Private Chat to [name]**. A new chat window opens to enable the private chat session.

## Chat Messages

The Chat Messages feature provides an organized listing of chat conversations and chat users. Select the required category and then use the right-click menu to access the available functions for the selected chat session or user.

**F1 Help:** For more details on Chat Messages and additional functions and configuration settings, refer to the online help.



## Create and Use Templates

Use the Desktop Agent templates to save and use commonly-used phrases and URLs when chatting.

### Create Template

1. Click the **Chat Templates** icon.
2. Click either the **Phrases** or **Links** tab in the Templates window. The existing entries that display can be edited or deleted.
3. Click **Add** and enter a suitable label and the associated text or URL.
4. Click **OK**.

### Use Template

1. Click the down arrow for either of the following icons:
  - **Chat Templates**
  - **URL**
2. Select the required item from the menu.

The text phrase is automatically sent to the other chat parties. The URL is pushed to the other chat parties.



**Note:** When a URL is received in:

- Desktop, the URL shows as an active link and the built-in Web Browser automatically opens the web page.
- Executive Insight, the URL shows as an active link.

## Additional Chat Functions

- Refer to the online help for additional less-frequently used functions and configuration settings.

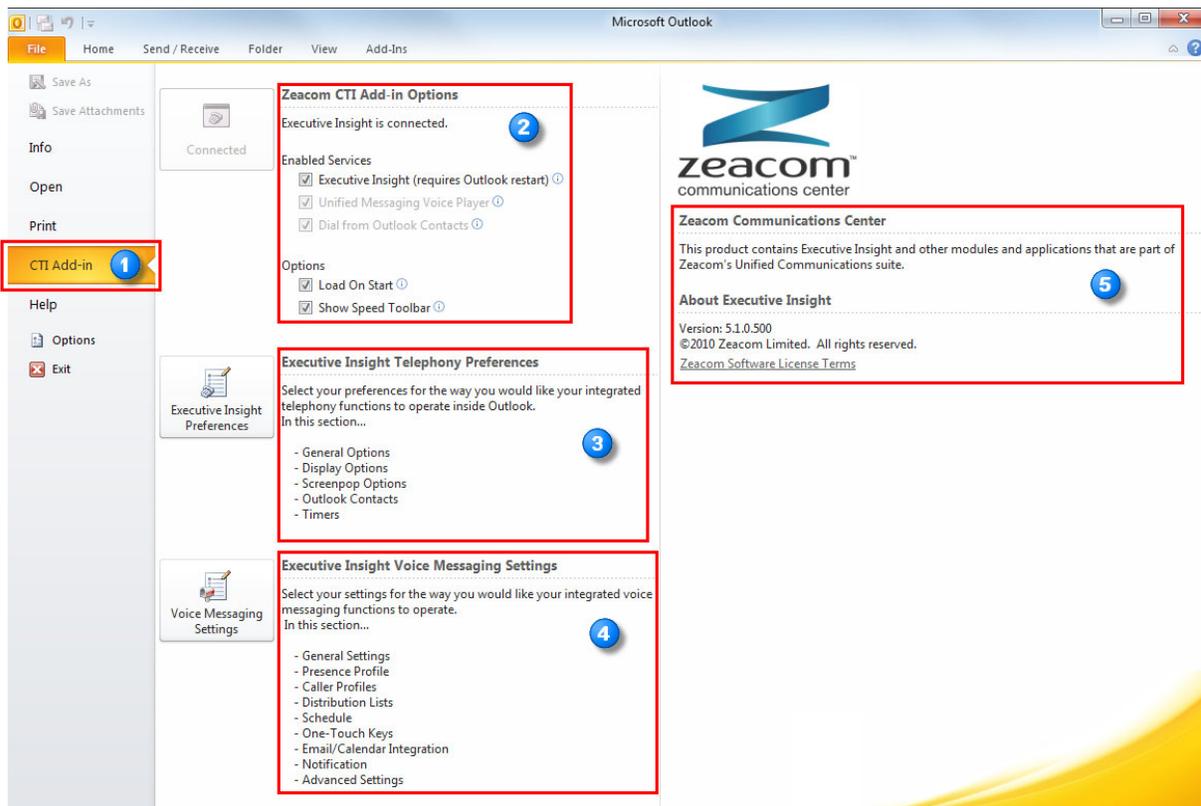
## Configure the Add-in Options

Use Outlook's CTI Add-in function to configure Executive Insight and set user preferences.



**Note:** Refer to the online help and the *User Mailbox Setup Quick Reference Guide* for more details.

- From the **File** menu, select **CTI Add-in**.



Item	Description
1	The CTI Add-in menu option.
2	Set the required start-up options.
3	Set up user-defined preferences for Executive Insight. When set, these usually do not need to be changed again.
4	Set up or edit personal mailbox settings, including recorded Presence profile greetings and the mailbox schedule. The first-time start up wizard initially assists in configuring the essential settings.
5	View Executive Insight's version details.



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