

**Dialect**  
**Desktop Integrator**  
**User's Guide**  
**Version 2.0**



**Communications Solutions**

## **User's Guide**

Part No.: DIG-360769-08UG  
Product Release: Dialect Desktop Integrator 2.0  
Document Release: DI07019801  
Date: July 1998

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# Introduction

## Understanding Dialect Desktop Integrator

Dialect Desktop Integrator is a Computer Telephony Integration (CTI) application that lets you control your telephone from any personal computer. Desktop Integrator doesn't require a physical connection between your phone and PC; it performs all telephony functions through your PBX.

You can use Desktop Integrator's intuitive interface to make, answer, disconnect, transfer, and conference calls — without ever touching your telephone. Alternatively, you can choose Desktop Integrator for some of these functions and your physical telephone set for others.



Figure 1: Desktop Integrator's standard interface (your screen may vary)

*What is an ACD?*

*ACD (Automatic Call Distribution) is a software option on your PBX that distributes calls evenly among agents. Generally, each agent is associated with one or more computerized waiting lines called "queues." Callers wait in queues when no agents are immediately available. An "ACD set" is a telephone that has been programmed to interface with an ACD system.*

Desktop Integrator's standard ACD feature set includes:

- Login
- Logout
- Not Ready, and
- Ready.

ACD extended features include:

- Auto Answer
- Auto Wrapup, and
- Auto Walkaway.

Desktop Integrator also supports the new "Not Ready/No Disconnect" state for Nortel users. By clicking a button during a call, you can direct the PBX to change your state to "Not Ready" as soon as your current call ends. Before this latest enhancement to the Nortel Meridian 1, choosing "Not Ready" during a call would disconnect your caller or cause the next caller in queue to hear "ringing" while being rerouted to another agent.

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## How to Use This Book

This **User's Guide** provides step-by-step instructions for using Desktop Integrator's set of features. It can be used as a training aid or reference tool for call center agents and others who use Desktop Integrator.

Other helpful resources include:

- A **System Administrator's Guide** that explains how to install Desktop Integrator and customize its interface.
- A comprehensive **help file** that helps you find information online using a detailed table of contents, index, and keyword list.

- A **Software Development Kit** for advanced administrators, available separately from your Williams Representative.

## **Starting Desktop Integrator**

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Start Desktop Integrator from the Windows Start menu or by double-clicking a shortcut that you have copied to your desktop.

You can also start Desktop Integrator from the DOS prompt by typing "TELIPAD *myinifile.ini*", where *myinifile.ini* is the name of the Desktop Integrator initialization file used to customize your personal Desktop Integrator environment. If more than one person uses your computer and telephone, ask your System Administrator if this method is right for you.

If you do not specify the name of an initialization file, Desktop Integrator uses TELIPAD.INI in the Desktop Integrator home directory.



# Using Desktop Integrator

## Desktop Integrator's General Interface





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All Desktop Integrator functions are accessible through Desktop Integrator's menu bar. Keyboard shortcuts and buttons are also available for the most common call handling tasks.











You can use these functions in any combination with those of your telephone. For example, you can initiate a transfer using Desktop Integrator but complete it using the telephone. Similarly, you can answer a call using the telephone but hang up using Desktop Integrator.






Use the following table as your "roadmap" to Desktop Integrator's various functions:








**Note:** While using Desktop Integrator, choose **Help | Keyboard shortcuts** for a quick reference guide.

Task/ Description	Button	Keyboard shortcut	Menu Bar
<b>Answer</b> Answers a call by taking the active line off-hook			Line-Answer
<b>Hang Up</b> Ends a call by placing the active line on-hook			Line-Hangup

Task/ Description	Button	Keyboard shortcut	Menu Bar
<p><b>Hold Call</b></p> <p>Places the active call on hold</p> <p><b>Note:</b> Not every PBX supports this function.</p>			Line-Hold
<p><b>Retrieve Call</b></p> <p>Retrieves a call previously placed on hold</p> <p><b>Note:</b> Not every PBX supports this function.</p>			Line-Retrieve
<p><b>Fast Transfer</b></p> <p>Performs an unsupervised transfer</p> <p>The Fast Transfer feature provides a single-step alternative to clicking the <b>Initiate Transfer</b> button and then the <b>Complete Transfer</b> button when the other party answers.</p> <ol style="list-style-type: none"> <li>1. In the <b>Destination</b> field, type the number to which you want to transfer or choose a destination from the directory.</li> <li>2. Choose the <b>Fast Transfer</b> function.</li> </ol> <p><b>Note:</b> This function cannot be duplicated on a telephone; it requires the Desktop Integrator interface.</p>			Line-Fast Transfer

Task/ Description	Button	Keyboard shortcut	Menu Bar
<p><b>Initiate Transfer</b></p> <p>Begins a supervised transfer</p> <ol style="list-style-type: none"> <li>1. In the <b>Destination</b> field, type the destination number for the transfer or choose a destination from the directory.</li> <li>2. Choose the <b>Initiate Transfer</b> function.</li> </ol>			Line-Initiate Transfer
<p><b>Complete Transfer</b></p> <p>Completes a supervised transfer started using the telephone or Desktop Integrator's Initiate Transfer function</p>			Line-Complete Transfer
<p><b>Cancel Transfer</b></p> <p>Cancels a transfer started using the telephone or Desktop Integrator's Initiate Transfer function</p>			Line-Cancel Transfer
<p><b>Repeat the Last Screen Pop</b></p> <p>Repeats the last transmission of data to your screen</p>			
<p><b>Initiate Conference Call</b></p> <p>Begins a supervised conference call</p> <ol style="list-style-type: none"> <li>1. In the <b>Destination</b> field, type the number of the party to add to the conference or choose a party from the directory.</li> <li>2. Choose the <b>Initiate Conference</b> function.</li> </ol>		 	Line-Initiate Conference

Task/ Description	Button	Keyboard shortcut	Menu Bar
<p><b>Complete Conference Call</b></p> <p>Completes a conference call started using the telephone or Desktop Integrator's Initiate Conference function</p>		<div style="border: 1px solid black; border-radius: 5px; padding: 2px; display: inline-block;">Control</div> <div style="border: 1px solid black; border-radius: 5px; padding: 2px; display: inline-block;">F6</div>	Line- Complete Conference
<p><b>Cancel Conference Call</b></p> <p>Cancels a conference call started using the telephone or Desktop Integrator's Initiate Conference function</p>		<div style="border: 1px solid black; border-radius: 5px; padding: 2px; display: inline-block;">Control</div> <div style="border: 1px solid black; border-radius: 5px; padding: 2px; display: inline-block;">F7</div>	Line-Cancel Conference
<p><b>Make a Line Active</b></p> <p>Designates a line to use to place and receive calls</p> <p><b>Note:</b> A bright green bar over a button indicates an active line.</p>			
<p><b>Dial</b></p> <p>Dials the number specified in the <b>Destination</b> field</p> <p><b>Note:</b> You cannot make outbound calls on an ACD line.</p>		<div style="border: 1px solid black; border-radius: 5px; padding: 2px; display: inline-block;">F2</div>	Line-Dial
<p><b>Make the ACD Line Ready</b></p> <p>Changes the status of the ACD line to "Ready"</p>		<div style="border: 1px solid black; border-radius: 5px; padding: 2px; display: inline-block;">Control</div> <div style="border: 1px solid black; border-radius: 5px; padding: 2px; display: inline-block;">R</div>	ACD-Ready

Task/ Description	Button	Keyboard shortcut	Menu Bar
<p><b>Make the ACD Line Not Ready</b></p> <p>Changes the status of the ACD line to "Not Ready"</p> <p><b>Note:</b> Clicking this button while a call is in progress may disconnect the caller. However, extensions in Desktop Integrator are available for Nortel Meridian 1 PBXs that offer the option of retaining the active call after clicking this button.</p>		 	ACD-Not Ready
<p><b>Login to the ACD Queue</b></p> <p>Logs you into the ACD Queue</p> <p><b>Note:</b> Nortel Meridian 2616 sets must be off hook to login.</p>		 	ACD-Login
<p><b>Logout of the ACD Queue</b></p> <p>Logs you out of the ACD Queue</p>		 	ACD-Logout

## Speed Dialing

The SpeedDial feature lets you place calls quickly by double-clicking entries in a list.

► **To SpeedDial numbers in your personal or shared directories:**

1. Choose **Integrator | SpeedDial** from the menu bar.  
A list of entries appears.

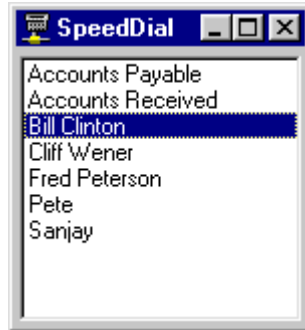


Figure 2: Sample Speed Dial Entries

2. Double-click the entry to dial.

Desktop Integrator places the call automatically.

**Note:** Read “The Personal Directory” on page 22 for help creating and maintaining a personal directory.

### Using the Directory Search Shortcut

As an alternative to choosing **Integrator | SpeedDial** from the menu bar, you can double-click the word **Destination** on Desktop Integrator’s interface and type the first few characters of the directory entry to dial.

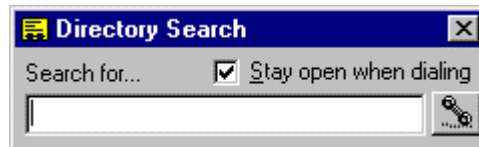


Figure 3: The Directory Search window

Desktop Integrator automatically searches your directory and displays the first match it finds in the message line at the bottom of the Desktop Integrator interface.



Click the Dial button or press Enter to begin dialing.

## Using Help

The Help menu offers fast access to instructions and troubleshooting tips.

- Choose **Help | Contents...** or **Help | Search for help on...** to open a comprehensive help file you can use to find answers to basic and advanced questions.
- Choose **Help | Keyboard** shortcuts for a quick reference guide to Desktop Integrator's buttons and keyboard shortcuts.
- Choose **Help | On the Web** to open your Web browser and travel to a **Home**, **General**, or **Technical Support** site.

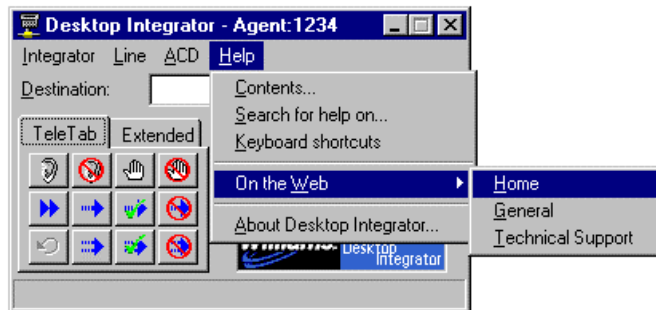


Figure 4: Choosing Help on the Web

**Note:** Your System Administrator must associate "Help on the Web" options with Web pages to use.

## Desktop Integrator's Extended Interface

Click the **Extended** tab to reveal any custom extensions added to extend Desktop Integrator's feature set. By changing settings in the TELIPAD.INI file, your System Administrator can add buttons to the Extended folder to launch special extensions and external applications.

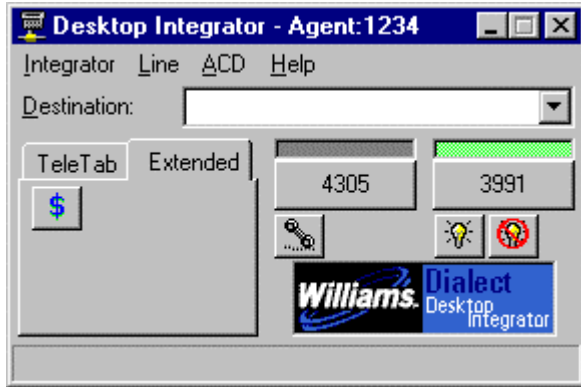


Figure 5: The Extended folder

## Charge Codes



If your System Administrator specified an “Access Code” in the [Charge Code] section of the TELIPAD.INI file, the **Extended** tab adds a **Charge Call** icon to this folder. You can use this icon for CDR (Call Detail Reporting).

Desktop Integrator creates a new CDR record on the PBX whenever you click the **Charge Call** icon. You can use CDR records for billing or other purposes.

Agents can assign charge codes to both inbound and outbound calls — even calls in progress. You can also configure Desktop Integrator to assign charge codes automatically. There is no limit to the number of charge codes you can associate with a given call.

## Custom User Buttons

By specifying values in the [UserButton-[1..4]] sections of the TELIPAD.INI file, your System Administrator can add custom buttons to Desktop Integrator's **Extended** folder. Desktop Integrator executes an operating system command or a script procedure when a user clicks one of these buttons.

## Changing Desktop Integrator Preferences

There are a variety of settings available for Desktop Integrator. Some can be changed only by a System Administrator; others can be accessed by choosing **Settings** from the Desktop Integrator menu.

Some settings take effect immediately after you click **OK** or **Apply**; others prompt you to restart Desktop Integrator. Click **OK** to save your changes and close the Settings window; click **Apply** to save your changes and keep the window open.

**Note:** You may not be able to change all of the preferences described in this section.

### General Settings

To access configuration settings, choose **Integrator | Settings** from the menu bar. A window containing five folders appears. Click the **General** tab to access the folder below.

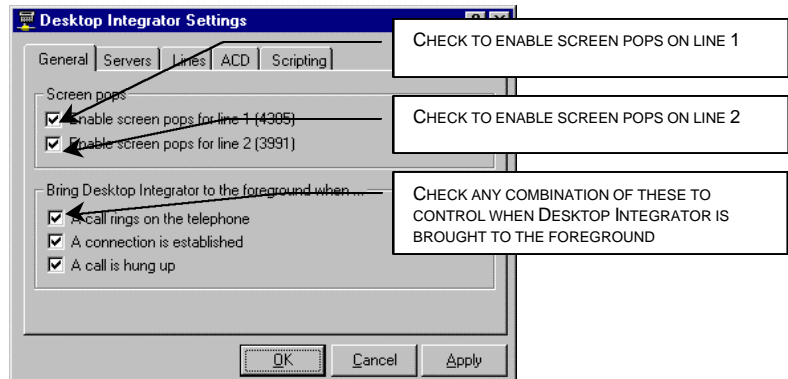


Figure 6: The General folder

### Screen Pops

Use these check boxes to authorize screen pops for individual lines. The number in parenthesis after each description corresponds to the line's DN.

### Bring Desktop Integrator to the foreground when...

Use the check boxes here to dictate when Desktop Integrator should display its Graphical User Interface.

### Server Settings

The following settings influence how Desktop Integrator interacts with special CT-Connect and optional Dialect Data Repository Server software.

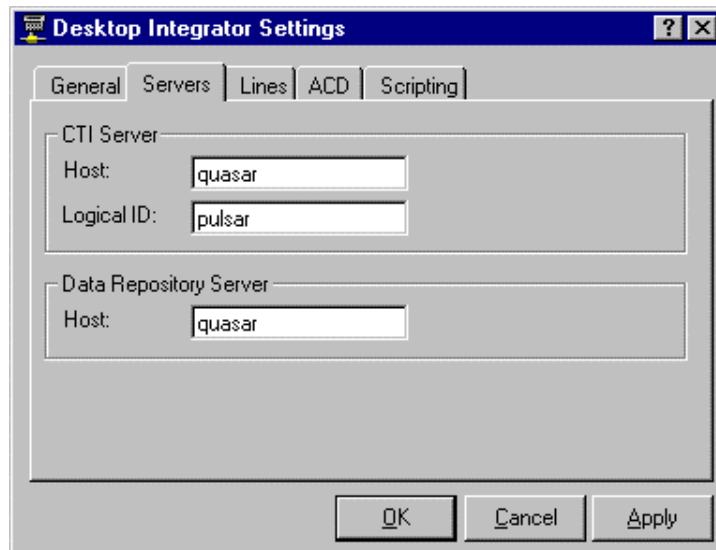


Figure 7: The Servers folder

## CTI Server

These settings define how Desktop Integrator interacts with the primary CT-Connect server. They correspond directly to parameters in the CT-Connect section of the TELIPAD.INI file.

**Host** (ServerName): The name of the host computer on which the CT-Connect Server software resides. Typically, this is a TCP/IP host name defined in DNS or in the HOSTS file of the user's operating system.

**Note:** This is a required setting.

**LogicalID:** The name of CT-Connect's logical link to PBX. This setting dictates which PBX your application will use through CT-Connect; it must match the name of the logical ID your System Administrator defined on the CT-Connect Server. Be sure to verify this setting especially in those circumstances where the same CT-Connect server connects to different PBXs.

**Note:** This is a required setting.

## Data Repository Server

**Host** (ServerName): The name of the host computer on which the Data Repository Server software resides.

Typically, the host is a TCP/IP host name defined in DNS or in the HOSTS file of the user's operating system.

## Line Settings

These settings define the operation of the line buttons on Desktop Integrator's Graphical User Interface.

**Note:** You must define at least one line.

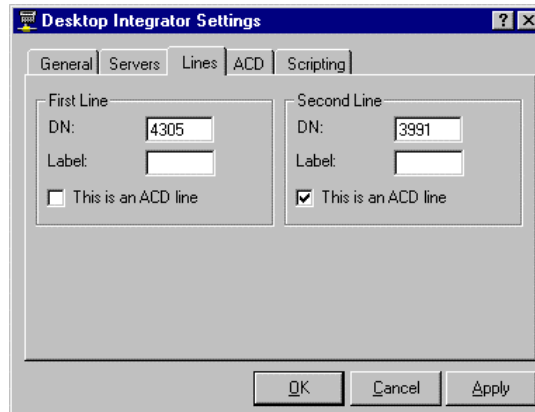


Figure 8: The Lines folder

### First Line

**DN:** The PBX directory number to monitor and assign to the first line button in Desktop Integrator's interface.

**Label:** The alphanumeric string to display on the first line button's face; Desktop Integrator uses the DN number if you do not specify a value.

**This is an ACD line:** Select this option to configure DN1 as an ACD line.

**Note:** Desktop Integrator allows only one DN to be configured for ACD operation.

### Second Line

**DN:** The PBX directory number to monitor and assign to the second line button in Desktop Integrator's interface.

**Label:** The alphanumeric string to display on the second line button's face; Desktop Integrator uses the DN number if you do not specify a value.

**This is an ACD line:** Select this option to configure DN2 as an ACD line.

**Note:** Desktop Integrator allows only one DN to be configured for ACD operation.

## ACD Settings

The settings here dictate how Desktop Integrator treats lines configured as ACD lines in the PBX.

Desktop Integrator ignores these settings if neither DN1 nor DN2 is configured as an ACD line.

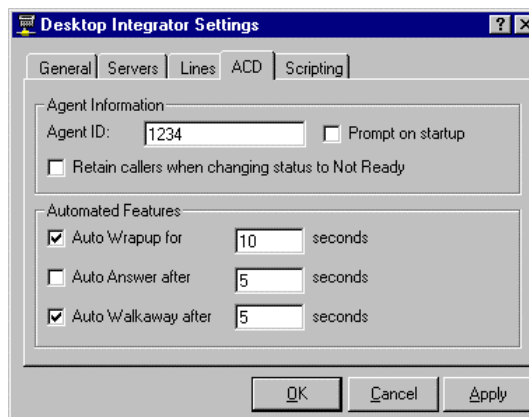


Figure 9: The ACD folder

### Agent Information

**AgentID:** The ID number used to login and logout of the ACD queue and to change to the “ready” and “not ready” states.

**Prompt on startup:** Specify “Yes” to prompt you for an ID number at startup. Desktop Integrator suggests the value of the AgentID parameter (if any) when it prompts you for an AgentID to use.

**Retain callers when changing status to Not Ready:** Select this option to let yourself choose the “not ready” state

during a call to direct the PBX to change your state to "Not Ready" as soon as your current call ends.

### Automated Features

**Auto Wrapup for:** Select this option to change your status to "Not Ready" automatically after a call is disconnected. Desktop Integrator returns you to the "Ready" state after any number of seconds you specify. Specify 0 seconds to disable the Auto Wrapup function.

The Auto Wrapup feature provides extra time for you to finish up work before becoming re-eligible to receive calls. Whenever Auto Wrapup is active, a graphic on the Desktop Integrator status bar displays the time left before the ACD returns your status to "Ready." This bar appears red while 100 to 50 percent of time remains, yellow while 50 to 25 percent remains, and green while 25 to 0 percent remains.

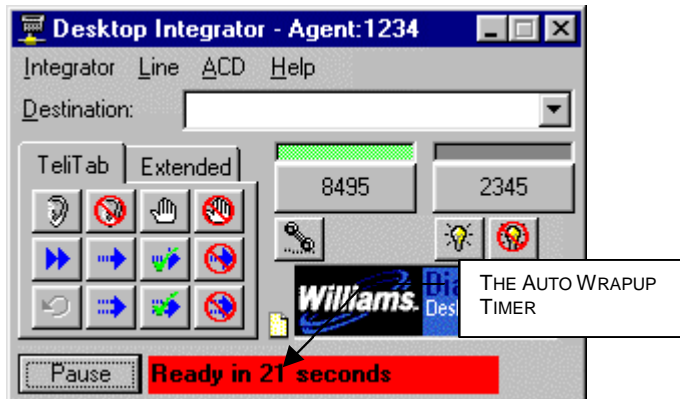


Figure 10: The Auto Wrapup timer

To pause the Auto Wrapup timer, click the **Pause** button; click the same button (relabelled **Resume**) to restart it. To cancel the Auto Wrapup delay, click the **Ready** button on Desktop Integrator's interface or the equivalent button on your ACD telephone set.

**Note:** Auto Wrapup is only available for use with ACD telephone sets.

**Auto Answer after:** Select this option to answer calls automatically after any number of seconds you specify. Specify 0 seconds to disable the Auto Answer function.

Auto Answer mimics call forcing. When Auto Answer is active, incoming calls on the ACD line are answered (i.e., lines are taken off hook) automatically after a specified number of seconds. Auto Answer provides you with time to absorb on-screen information before answering the telephone.

**Note:** Auto Answer is only available for use with ACD telephone sets and cannot be used concurrently with Auto Walkaway.

**Auto Walkaway after:** Select this option to return unanswered calls to the ACD automatically (and change the ACD line's state to "Not Ready") after any number of seconds you specify. Specify 0 seconds to disable the Auto Walkaway function.

When Auto Walkaway is enabled, unanswered calls are returned to the ACD queue after a specified number of seconds. The ACD line is put into the "Not Ready" state, sending the caller back to the queue. To return to the "Ready" state, click the **Ready** button on Desktop Integrator's interface or the equivalent button on your ACD telephone set.

**Note:** Auto Walkaway is only available on ACD telephone sets and cannot be used concurrently with Auto Answer.

## Scripting Settings

The settings here define how Desktop Integrator uses optional scripts.

Desktop Integrator includes a powerful scripting engine that supports the popular VBScript language. Scripting lets you automate tasks, interface with external applications, ActiveX servers, etc.



The script icon, shown here, appears on Desktop Integrator's interface when a script exists in memory. Desktop Integrator draws an "X" through this icon when the script in memory is inactive. Desktop Integrator offers you the option of deactivating a script if it encounters errors while loading. A question mark appears if you load a script with known errors.

Right-click the icon to view the last script error message or quickly deactivate, edit, or reload your scripts.

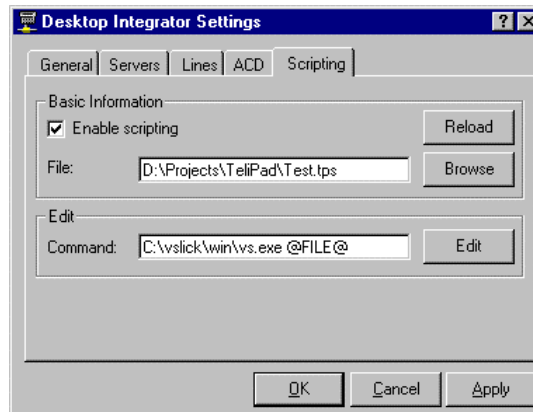


Figure 11: The Scripting folder

### Basic Information

**Enable Scripting:** Select this option to process a script according to the other parameters in this folder.

**File:** The path and file name of the script to use.

**Reload:** Click **Reload** to replace Desktop Integrator's current script with the script specified in the **File** field.



Browse

**Browse:** Click **Browse** to peruse your directory structure for the script file to use.

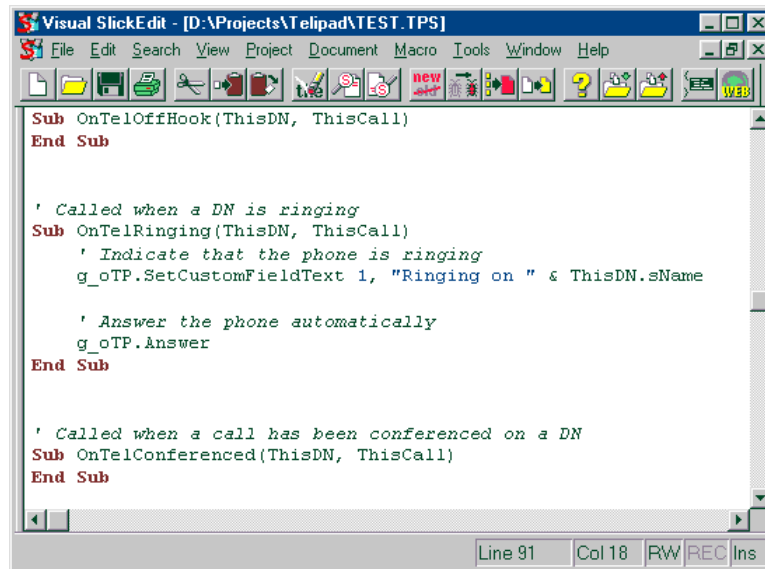
## Edit

**Command:** The command to execute when you choose to edit the script, either from this folder or from Desktop Integrator's Graphical User Interface.

**Note:** The editor you choose must support long pathnames that contain spaces. Some editors also require users to enclose file names in quotation marks.

Edit

**Edit:** Click **Edit** to execute the command in the **Command** field and initiate an editing session like the sample session illustrated below.



```

Visual SlickEdit - [D:\Projects\Telipad\TEST.TPS]
File Edit Search View Project Document Macro Tools Window Help
Sub OnTelOffHook(ThisDN, ThisCall)
End Sub

' Called when a DN is ringing
Sub OnTelRinging(ThisDN, ThisCall)
' Indicate that the phone is ringing
g_oTP.SetCustomFieldText 1, "Ringing on " & ThisDN.sName

' Answer the phone automatically
g_oTP.Answer
End Sub

' Called when a call has been conferenced on a DN
Sub OnTelConferenced(ThisDN, ThisCall)
End Sub
Line 91 Col 18 RW REC Ins

```

Figure 12: Sample editing session

## The Personal Directory

---

A directory is a list of names, telephone numbers, and optional charge codes. Each directory can contain hundreds of entries.

Your personal directory consists of any entries you create plus any “shared” entries created by your System Administrator. Desktop Integrator can automatically merge up to 99 shared directories with each personal directory.

*Use Desktop Integrator's directory drop down list to “speed dial” frequently called numbers.*

The directory field's drop down list contains all of your directory entries. By picking numbers in this list and clicking **Dial**, you can place calls more quickly.

Choose **Integrator | Directory** from the menu bar to access your personal directory.



Figure 13: Sample directory entries

### ► To Add to Your Personal Directory

1. Click **New** to clear the **Name**, **Number**, and optional **Charge** Code fields.

**Note:** The Charge Code field appears only if your System Administrator enabled call charging by specifying an "Access Code" in the [Charge Code] section of the TELIPAD.INI file.

Add

2. Enter the name and number of the person to add in **Name**, **Number**, and optional **Charge Code** fields and click **Add**.

► **To Change an Entry in Your Personal Directory**

1. Highlight the name of the entry you want to change.
2. Make changes as appropriate.
3. Click **Update**.

Update

► **To Remove an Entry from Your Personal Directory**

1. Highlight the name of the entry you want to remove.
2. Click **Delete**.

Delete

**Note:** If you are required to dial prefixes such as "9" or "91" before certain telephone numbers, be sure to include these prefixes in your directory entries or ask your System Administrator to configure Desktop Integrator to dial these prefixes automatically.

**Note:** The charge code is an optional item of information that Desktop Integrator can use to charge outbound calls. Your System Administrator can tell you if call charging is enabled and what charge codes to use.

**Note:** You can modify only personal directory entries. You cannot modify shared directory entries entered by your System Administrator. Shared entries are identified by the abbreviation "shr."

## Shared Directories

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A directory is a list of names, telephone numbers, and optional charge codes. Each directory can contain hundreds of entries.

Maintained by your System Administrator, shared directories contain entries to merge with personal directories. Desktop Integrator can merge up to 99 shared directories with each personal directory automatically. In personal directories, shared entries are identified by the abbreviation "shr."