











The Client views

Click a button in the view bar on the left side of the Client window to go to a view.

General	
	Voice Messages view Hear, manage and archive your voice messages. To call back a message, right-click it and choose Place Call.
	Call Monitor view Place calls and handle incoming calls (transfer calls, create conference calls, monitor voice mail as it is being left).
	Contacts view Manage an online phone book of your telephone contacts.
	Extensions view View all TeleVantage extensions, their personal statuses, and who is on the phone now.
	Call Log view View a record of all your phone calls. Double-click a call to return the call.
Advanced	
	Greetings view Record your voice-mail greetings and change the active greeting.
	Routing Lists view Set up "follow me" call forwarding (calls ring a series of numbers to find you), and direct calls to workgroups or other extensions.
	Personal Statuses view Manage personal statuses that communicate your location and availability to your coworkers and control how your incoming calls are handled.
	Call Rules view Set up custom call handling for individual callers or for specific dates or times.
	Workgroups view Define groups of users and contacts. You can then send voice messages to the group, share your Client views with the group, and more. See <i>Using TeleVantage</i> for more information.

TeleVantage QuickStart Guide

TeleVantage 4.0

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Quick Reference

Use this page as a quick reference for the information you use most often.

My extension: _____

My password: _____

My Direct Dial number (if available):

Web Client URL: _____

Special access codes

Access Code	TeleVantage Feature	Default
	Access dial-by-name directory	411, *93
#	Log into account from internal dial tone	#
	Log into account from auto attendant	#
	Emergency	911

Access Code	Dialing Service	Default
	Dial an outside line	9

Welcome to TeleVantage

Your office phone is part of the award-winning TeleVantage phone system. This booklet provides an introduction to TeleVantage and a quick reference that will help you use the phone system and take advantage of its many time-saving features.

Where to find more detailed information

- *Using TeleVantage.* This manual provides complete information on all TeleVantage features. To view the online book version, click **Help** on the TeleVantage Client's menu bar. Your TeleVantage system administrator can also provide you with a printed copy or a PDF file that you can view or print using Adobe Acrobat Reader.
- **Online Help.** In any dialog box in the Client, click **Help** or press **F1** for an explanation of that dialog box. You can also access Help using the **Help** menu.

Accessing TeleVantage

You can access TeleVantage in the following ways:

- **The phone.** To use most of TeleVantage's features, the phone is all you need. Verbal menus guide you through handling calls and customizing your account.
- **The TeleVantage Client application.** The Client enables you to use the full power of the TeleVantage system. If you have the Client installed, you can run it by choosing **Start > Programs > Artisoft TeleVantage > TeleVantage Client**.
- **The TeleVantage Web Client.** If your office supports it, you can access a version of the Client over the Web. Ask your TeleVantage system administrator for the Web Client address.

Setup for new users

If you are a new TeleVantage user, you should perform the following tasks in your account as soon as you can:

- **Record a voice title.** A voice title is a brief recording of just your name that TeleVantage plays to callers under various circumstances (such as when they look you up in the dial-by-name directory).

Pick up the phone and press **#**. Follow the prompts to log in, and then press **6 2 1** to record your name. Press **#** immediately after saying your name to end recording.

- **Record a voice-mail greeting.** A voice-mail greeting is the message that callers hear when they reach your voice mail. Your account comes with a prerecorded greeting, but it is best to record one in your own voice.

Pick up the phone and press **#**. Follow the prompts to log in, and then press **4 4** to record the greeting. Press **#** to end recording.

- **Change your password.** Your first password is probably the same number as your extension, unless your TeleVantage system administrator told you otherwise. You should enter a new password that will be more secure.

Pick up the phone and press **#**. Follow the prompts to log in, and then press **6 3** to change your password.

Placing calls

TeleVantage enables you to place calls either manually using the phone or visually using the Client.

Placing calls with the phone

- **Calling another extension.** Pick up the phone and dial the extension.
- **Calling an external number.** Dial an access code (usually 9) and the number. Your TeleVantage system administrator can tell you the access codes to dial for various types of external calls.
- **Calling while on another call.** Press **Flash #**. Your caller is put on hold. When you hear the dial tone, dial the number. To switch between calls, press **Flash**.
- **Entering account codes.** See your TeleVantage system administrator about your office's account code system.

Placing calls with the Client

Choose **File > New > Call**. In the Place Call To dialog box, do one of the following:

- **Call another extension.** Click **Extensions**, click the extension you want to call, and then click **OK**.
- **Call an external number.** From the **Call Using** drop-down list, select the access code and dialing service to use (usually 9 for the Phone Number dialing service). Your TeleVantage system administrator can tell you the access codes to select for various types of external calls. In **Name/Number**, enter the number to dial. Then click **OK** to place the call.

If you have not already picked up your phone, it rings to connect you to the call being placed.

You can also use the **Dial** field on the toolbar to place a call. Type an extension or complete phone number (with access code, usually 9) and press **Enter**. You can also type the name of a user or contact.

Answering calls

TeleVantage enables you to screen your calls before answering them, either verbally over the phone using call announcing or visually in the Client.

Answering with the phone

- **Answering your phone.** Pick up the phone.
- **Answering another ringing phone.** Pick up your phone. Press * **91 #**. If more than one phone is ringing, enter the extension that you want to answer before pressing **#**.

The “Call From” prompt

If you hear “Call from <name>” when you answer the phone, you have call announcing turned on. After the announcement, you can do the following:

- **Press 1.** Accept the call.
- **Press 2 or hang up.** Send the call to voice mail.
- **Press 3.** Send the call to voice mail and monitor the message as it is being left.

Turning off the “Call From” prompt

In the Client, choose **Tools > Options**. Click the Incoming Calls tab. Uncheck **Internal**, **External**, and **External Direct**. Click **OK**.

When you answer the phone now, you will be connected immediately with the caller.

Answering with the Client

Pick up the phone. Select the row of an incoming call in the Call Monitor and choose **Actions > Take Call**. If you are already on a call, that call is put on hold.

Related Options. Choose **Tools > Options**.

General tab

- Turn call waiting on or off.

Phone tab

- Customize the ring pattern for different types of calls.
- Use the Caller ID display on your phone.

Incoming Calls tab

- Customize Client behavior when you receive a call.

Transferring Calls

A *blind transfer* transfers the call without your announcing it first. The recipient answers the phone and speaks to the caller directly.

A *supervised transfer* puts the caller on hold and lets you speak to the recipient first. The recipient answers the phone and is speaking to you. If the recipient agrees to take the call, you can transfer it. Otherwise, the call stays with you.

Transferring with the phone

- **To perform a blind transfer.** Press **Flash 1**. Enter the extension. Hang up to complete the transfer.
- **To perform a supervised transfer.** Press **Flash 1**. Enter the extension. You are connected to the recipient, and the caller is put on hold.
 - To complete the transfer, hang up.
 - To cancel the transfer, press **Flash 1**. You are reconnected with the caller.

Transferring with the Client

In the Call Monitor view, click the call that you want to transfer. Choose **Actions > Transfer**. Select the recipient (if it is an extension or contact) or enter the phone number.

- **To perform a blind transfer.** Click **Blind**. Click **OK**.
- **To perform a supervised transfer.** Click **Supervised**. Click **OK**. The caller is put on hold, and your connection to the recipient appears as a second row for the call in the Call Monitor view. The Supervised Transfer dialog box opens.
 - To complete the transfer, click **Complete**.
 - To cancel the transfer, click **Cancel**.

Call Handling

See *Using TeleVantage* for many more call handling options.

Putting a call on hold

Using the phone

Press **Flash**. To return to the caller, press **Flash** again.

To put a caller on hold without hearing the telephone command prompts, press **Flash 7**.

Using the Client

Select the call in the Call Monitor view and click **Actions > Hold**.

Creating a conference call

Using the phone

Place the first call. Press **Flash #** to put the call on hold and place the second call. Repeat for subsequent calls.

When you have placed all calls, press **Flash 5** to conference them together.

Using the Client

Place the first call. Click the call in the Call Monitor view and click **Actions > Conference**. Using the Conference With dialog box, place the second call. When the call is answered, click **Complete** to add the party to the conference. Repeat to add other parties.

Related Options. Choose **Tools > Options**.

General tab

- By default, TeleVantage rings your phone if you leave a call on hold too long. Under "Ring back if I leave a call on hold or parked," you can turn off this feature or change the amount of time TeleVantage waits before ringback.

Incoming Calls tab

- When a call is transferred to you, you can have TeleVantage announce the name of the person who is transferring the call in addition to the caller's name. Check "Announce Who Is Transferring."

Voice Messages

Managing voice mail is easy using the phone or Client.

Using the phone

To log in, dial # <extension> # <password> #.

- **To listen to your new voice messages.** Log in and press **1**. You can also press **2** to hear your saved messages.
- **To send a voice message.** Log in and press **3**. Record your message. When you are done, press **# 1**. Enter one or more extensions to which you want to send the message, followed by **#**.

Enter multiple extensions like this:

ext1 # ext2 # ext3 # #

Using the Client

In the Voice Messages view, double-click the message that you want to hear.

- **To save a message.** Drag the message to the Saved folder or to another folder of your own creation.
- **To create a new folder.** Right-click **Inbox** in the Folder List and choose **New Folder**.
- **To delete a message.** Click the message and press Delete. The message moves to the Deleted folder. To delete the message permanently, empty the Deleted folder by choosing **Tools > Empty Deleted Folder**.

To view the Folder List, choose **View > Folder List**.

Notes

- See the inside back cover for more voice message and greeting options using the phone.
- You have a limited amount of space in which to store voice messages (including Deleted ones). To see how much you have used, choose **Tools > Options**, click the Voice Message tab, and look at **Mailbox usage**.
- You can listen to voice messages over the phone or over your computer speakers. Choose **Tools > Audio Output** to switch between them.

Greetings

A greeting is the message callers hear when they reach your voice mail. TeleVantage lets you record and name multiple greetings for different occasions (for example, “Away from my desk,” “Weekend,” “On vacation”), and easily switch between them. The *active greeting* is the one currently being used.

Using the phone



To log in, press # <extension> # <password> #.

- **To hear your greeting.** Log in and press **4 1**.
- **To record a new greeting.** Log in and press **4 6**.
- **To change the active greeting.** Log in and press **4**. After a greeting plays, press **2** to advance to the next greeting. When you reach the greeting you want to make active, press **3**.

Using the Client

You can use personal statuses as an easy way to change your active greeting. See page 12.

You can also go to the Greetings view. The active greeting is marked by .

- **To hear a greeting.** Double-click the greeting.
- **To record a new greeting.** Choose **File > New > Greeting** and pick up your phone. In the Greeting dialog box, click . After the beep, begin speaking. When you are finished, click . Enter a **Name** and the **Contents** of the greeting. Click **OK**.
- **To change the active greeting.** Click the greeting that you want to make active. Click **Actions > Set as Default and Active**.

Related Options. Choose **Tools > Options**.

Voice Message tab

- Set the maximum length for a single voice message.
- Automatically empty the Deleted folder to save space.

Notification tab

- Receive an e-mail or a page whenever you receive a new voice message.

Personal Status

Personal statuses such as Available, In a Meeting, or On Vacation, displays your location and availability to your coworkers. You can see other users' personal statuses and they can see yours, making it easy to tell at a glance whether someone is available to take a call.

Personal status also can determine how your incoming calls are handled. You can use personal status as a quick way to send calls directly to voice mail, play a specific voice mail greeting, or forward your calls.

Changing your personal status

Your current personal status is always visible on the Client status bar.

To change your personal status, do either of the following:

- In the Client, click  and choose another personal status.
- Using the phone, log in and press **6 1**.

Predefined statuses

The following statuses are predefined in TeleVantage:

- **Available.** Indicates that you are at your desk and ready to receive calls.
- **Do Not Disturb.** Sends your incoming calls directly to voice mail without ringing your phone.
- **In a Meeting / Out of the Office / On Vacation.** Same as DND, and tells people where you are.

To edit how any of these personal statuses handle incoming calls, double-click the personal status in the Client's Personal Statuses view.

Custom personal statuses

You can create custom personal statuses, for example, a status called "Working From Home" that forwards calls to your home phone.

To create a custom personal status, choose **File > New > Personal Status**.

Forwarding Calls

TeleVantage lets you forward your calls to another extension or to an external phone number so that you can receive your calls whether you are down the hall, at home, or on the road.

Forwarding with the phone

To log in, press # <extension> # <password> #.

- **To forward your calls to another extension.**

Log in and press **5 2**. Enter the extension.

From another extension, you can log in and press **5 1**.


- **To forward your calls to an external number.**

Log in and press **5 3**. Enter the phone number as you would dial it, including the access code (usually 9).

From an external phone that supplies caller ID, you can call your office, log in, and press **5 1**.

- **To turn off call forwarding.** Log in and press **5 4**.

Forwarding with the Client

- **To forward your calls.** Choose **Tools > Call Forwarding**. Check **Forward Calls**. If you are forwarding to an external number, select the access code to use (usually 9) from the **Call Using** drop-down list. Click **OK**.
- **To turn off call forwarding.** Choose **Tools > Call Forwarding**, or click  on the status bar. Uncheck **Forward calls**.

You can also use personal statuses as an easy way to forward your calls. See page 12.

Contacts

The Contacts view in the Client functions as an online phone book in which you can store your telephone contacts. After you enter contacts into TeleVantage, you can do the following:

- Place a call to a contact with a click of the mouse.
- Teach TeleVantage to recognize contacts when they call. Their names appear in the Call Monitor view when your phone rings, so that you can see who is calling. You can also play custom greetings for individual contacts or route their calls differently than other calls, using call rules.

Entering a contact

In the Client, go to the Contacts view. Click **File > New > Contact**. In the Contact dialog box, enter the contact's information (click **Help** for assistance) and click **OK**.

Contact voice titles

A contact can have a voice title, which is a short recording you make of the contact's name. If you use call announcing, TeleVantage announces calls from a contact by saying "Call from <voice title>."

Placing a call to a contact

Pick up your phone and click **File > New > Call**. In the Place Call To dialog box, click **Contacts**. Select the contact to call. Select the contact's phone number to dial in the drop-down list below the contacts list. Click **OK**.

Related Options. Choose **Tools > Options**.

View tab

- You can customize the Contacts view so that double-clicking a contact places a call to the contact's default phone number. Doing this makes it faster for you to call a contact from the Client.

Caller Recognition

TeleVantage recognizes contacts when they call by their caller ID numbers (or PIN numbers; see below). Each contact has a list of phone numbers that TeleVantage uses to identify that contact. To view the list, double-click the contact in the Contacts view and click the Caller Identification tab.

Adding a phone number for contact recognition

Use either of the following methods to add a phone number to a contact's Caller Identification tab:

- Enter it as one of the contact's phone numbers and check **Use phone number as caller identification for this contact**.
- When the contact calls, associate the caller ID number of the call with the contact. Select either the active call in the Call Monitor, the record of the call in the Call Log, or the voice message from the Inbox of the Voice Messages view. Choose **Actions > Associate**. In the Associate dialog box, select the contact. Select whether to use the caller ID name or number for contact recognition. Click **OK**.

TeleVantage will then recognize the contact on subsequent calls from that phone number.

Contact PINs

Contact PINs enable TeleVantage to recognize contacts when they call from any phone, even a phone without caller ID. A contact PIN is a unique number that you give to the contact to add to your extension. For example, if your extension is 115, and you assign Tom Smith a contact PIN of 77, you would tell Tom Smith that your extension is 11577. When a call arrives for extension 11577, TeleVantage knows it is Tom Smith calling for you.

To assign a contact PIN to a contact, double-click the contact, click the Caller Identification tab, and enter the PIN number.

Routing Lists

A routing list tells TeleVantage how to route calls to you. All incoming calls are handled by a routing list. By default, you have a routing list that rings one phone—your desk phone, known as *Where I Am*—and if there is no answer, sends the call to your voice mail. (When you use call forwarding, the *Where I Am* phone number changes to the forwarding number, but the routing list remains otherwise the same.)

You can create custom routing lists that ring any number of phones in sequence to find you, and that send callers to somewhere other than voice mail if you do not answer. You can create different routing lists for different situations and easily switch between them. The *active routing list* is the one that is currently used.


Example routing lists

- If you work in your office and in the conference room down the hall, a routing list can ring your office phone first, and then if you do not answer, ring the conference room phone. If you still do not answer, it sends the call to voice mail.
- When you go on vacation, you might forward your calls to a co-worker. You could also switch to a routing list that, if your co-worker does not answer, sends calls to his voice mail instead of yours.
- With call rules, you can create routing lists for specific callers. You can have important callers follow a routing list that tries you at your desk and then at your mobile phone. See Call Rules on the facing page.

Creating a routing list

In the Client, go to the Routing Lists view. Click **File > New > Routing List**. Click **Help** or see *Using TeleVantage* for instructions on creating the routing list.

Changing the active routing list

In the Client, go to the Routing Lists view. Select the routing list that you want to make active and choose **Actions > Set as Default and Active**. The active routing list is marked by .

Call Rules

Call rules enable you to handle certain incoming calls differently than others. For example, you can have callers after business hours go directly to voice mail without ringing your phone and hear a voice mail greeting that says you are gone for the day. You can also have calls from your boss (or a group of important callers) use a routing list that tries your desk phone and mobile phone.

Creating a call rule

In the Client, go to the Call Rules view and choose **File > New > Call Rule**.

Ways to distinguish incoming calls

You can choose which incoming calls activate a call rule by using any or all of the following as criteria:

- **Identified callers.** The rule can be activated for an individual user, a contact, or a workgroup. If you choose a workgroup, calls from any member of the workgroup activate the rule. The rule can also be activated for unidentified callers.
- **Type of caller.** The rule can be activated for internal callers or external callers.
- **Date and time of calls.** The rule can be activated if the call occurs on certain dates or during certain times of the day. Uncheck all “caller” options to have a time condition apply to all callers.

Ways to change how the call is handled

You can have a call rule handle a call in any or all of the following ways:

- **Greeting.** You can choose the greeting that plays.
- **Routing list.** You can choose the routing list that the call follows.
- **Taking calls.** You can specify whether the call rings your phone or is sent directly to voice mail.
- **Personal status.** You can select a personal status and have the call handled as if that personal status were in effect. Note that the call rule’s settings for greeting, routing list, and taking calls override the personal status’ settings.

Hands-free Answering

TeleVantage includes a hands-free answering feature that enables you to answer calls without picking up and holding a receiver. Hands-free answering enables you to work with a headset telephone or a pager connected to an overhead speaker.

Answering calls with hands-free answering

With hands-free answering, the phone is considered to be off-hook, but you do not hear a dial tone. To place a call, press **Flash** to get a dial tone. Incoming calls do not ring your phone, but are signaled by a beep. To answer an incoming call, you do not need to pick up the receiver. After you hear the beep, you are connected with the caller and can start talking (unless you have announce caller on—see page 7).

With hands-free answering, you can use the Client and telephone commands exactly as you normally would to transfer calls, create conference calls, and so on.

Enabling hands-free answering

To enable hands-free answering, choose **Tools > Options** and click the Phone tab. Check **Enable hands-free answering**.

Uncheck **Enable hands-free answering** to return to normal telephone behavior.

You can also pick up the phone and press ***10** to toggle hands-free answering on and off for that phone.

Telephone Commands

Call Handling

Put caller on hold	Flash (or ** at remote phone)
Return to caller	Flash again, or 4
Transfer	Flash 1 <ext.> hang up <i>or talk before hanging up</i>
Send to Voice Mail	Flash 2 <ext.>
Disconnect	Flash 3
Park	Flash 6 to park (note orbit number)
Unpark	*9 2 <orbit number> to pick up
Silent hold	Flash 7
Voice mail menu	Flash 9
Start another call	Flash #
Create conference call	1. Dial the first party 2. Flash # , Dial the second party <i>Repeat for other parties, and then...</i> 3. Flash 5 to conference all calls
Enter account code	*11
Answer another ringing phone	*91 (or *99 for within your workgroup)

Voice Mail/Account Menu

To log in, pick up the phone and press #

1	Play voice messages (Inbox folder)			
2	Play voice messages (Saved folder)			
	1 Replay	2 Next msg	3 Delete	41 Reply
	42 Forward	43 Call back	5 Previous msg	6 Save
	7 Rew	8 Undelete	9 FF	
3	Send voice message			
	1 Send	2 Review	3 Re-record	4 Append
	5 Urgent	6 Private	* Cancel	
4	Manage greetings			
	1 Replay	2 Next	3 Make active	4 Rerecord
	5 Revert	6 New	7 Delete	
5	Call forwarding			
	1 To this number	2 To internal number	3 To external number	
	4 No forwarding	5 Hear forwarding	6 Toggle rules	
6	Account preferences			
	1 Personal status	2 Voice title	3 Password	
7	Hang up (<i>remote login only</i>)			
9	Manage calls on hold			
#	Dial tone to start another call			