Smart Operator®

Version 3.1

User Manual



To download the Smart Operator User Manual (this document), visit the following internet web site.

http://www.samsungelectronics.com

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Chapter 1 Introduction

Contents of this Guide

Chapter 1—Introduction

This chapter provides an introduction to the Smart Operator. The power of third party call control is reviewed.

Chapter 2—Installing Smart Operator

This chapter explains the process of installing the Smart Operator including the Samsung DCS TSP. System requirements are listed for the stand-alone configuration.

Chapter 3—Using Smart Operator

This chapter provides a complete overview of the Smart Operator and its various components. It also reviews how to set up and configure the Smart Operator for the DCS System. This is the real "user's guide" and we highly recommend you read this chapter in its entirety prior to "going live".

Chapter 4—Glossary & Technical Bulletins

This chapter includes a glossary of the terminology commonly used throughout this manual, FAQ's (Frequently Asked Questions), and troubleshooting.

Introduction to Smart Operator

The Smart Operator is a PC-based attendant console providing a graphical user interface (GUI) and real-time display of events as they occur in your telephone system. These events reflect changes in telephone system components such as trunks, extensions, voicemail, and auto attendant ports. For example, a ring event on either an extension or trunk will cause the Smart Operator application to respond by "popping" a message onto your PC's screen and "blinking" corresponding icon. Additionally, an extension event such as "off hook" will result in the associated icon being placed into a busy state (yellow). The user friendly GUI has been designed to deliver both performance and ease of use.

The Smart Operator interfaces via an available serial port on the DCS System. The serial cable can be up to 300′ between the two devices if the PC is equipped with a 16550 UART chip set. It is recommended that the cable be rated at Cat 5 to reduce interference.

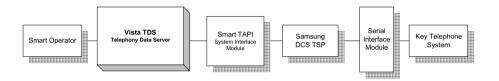
By utilizing the power and flexibility of third party call control inherent in the telephone system, the Smart Operator provides for advanced computer-based telephony applications. the Smart Operator is a suite of computer/ telephony applications and, as such, all extensions, trunks, and clients are considered "Devices". Throughout this document we will refer to these "Devices" often.

As you navigate through the process of answering and transferring calls, these events will continue to update the GUI and provide you with the real-time information needed to determine the most logical means of handling the call. The Smart Operator runs on an IBM-compatible machine equipped with an NT 4.0 operating system. This guide assumes the user has a working knowledge of this platform.

Smart Operator Architecture

The Smart Operator suite is based on client/server architecture. The "Server" itself consists of several software components running on Windows NT. These include the **VistaTDS** (Telephony Dynamic Data Server,) a System Interface Module (Smart TAPI) and several application DLL's.

Smart Operator Design Overview



These "Server" components reside on a networked Windows NT computer provided by the System Integrator or end-user. The Smart Operator "Server" PC is connected to your telephone system(s) or communications server via either a serial port or network interface.

The Smart Operator Suite is component-based with each component being totally independent of the other - providing for a very high degree of fault tolerance in installations.

Note

This package is the Smart Operator Stand-alone version, so all the components should reside on a single NT computer.

Features & Capabilities

Drag & Drop Call Processing - This feature allows the operator to simply drag a call onto the requested extension's icon to complete the transfer. See Drag and Drop call processing for additional information.

Real-Time Display of Calling Party Information - The Activity List displays every call that is ringing, holding or recalling to the operator. All information related to the calling party is displayed including Caller ID (number).

Real-Time Display of Extension's Status - With the Smart Operator, the attendant is capable of displaying the status of all system devices simultaneously. These devices can be displayed in a single BLF Group or as members of other groups created by the user to help identify extensions by department or branch. BLF groups are created by dragging members from the main "Active" group into newly created groups. These members are displayed as icons that provide the status of each extension. Additionally, the icon can display information related to the extension user such as:

- Do Not Disturb Message
- Forward Status (All Call Forward only)
- Total number of calls connected to and waiting for the extension
- The Telephone Number of the party they are speaking with

Keyboard/Mouse Call Processing - The application has been designed so that the user can use the keyboard, mouse or combination of both to process calls. If the operator answers the call by lifting the telephone handset, the application will allow for this, making it possible for the operator to go between the Smart Operator and the telephone if desired.

Call Processing Options – The Smart Operator provides various transfer options. Using the keyboard and/or mouse, the operator can perform the following:

- Supervised Transfer
- Blind Transfer(Send Call)
- Transfer to Voice Mail
- Transfer to offsite numbers
- Hold Call
- Retrieve Held Calls
- Park Call

On-Line Assistant - The Info Banner provides the user with valuable information to assist them in becoming familiar with the Smart Operator application.

A Warning About the Power of Call Control

Prior to running the Smart Operator, the system administrator and end users should fully understand how call control affects the host telephone system and the power this application will provide over processing telephone calls.

Call control means having the ability to control every step a call will take from the time it is first detected by the host telephone system until the caller hangs up. Unlike the past where a call followed a preset path, call control allows you to override or interrupt the preprogrammed algorithm and redirect the call based on real-time events.

The addition of call control to a telephone system enables the control of peripheral devices, such as paging, voice mail, and automated attendants in addition to trunks and extensions. Thus you can control every device associated with call processing.

Because of this control, the Smart Operator must be carefully installed and maintained to assure that its capabilities are not abused. If not, you may provide unintended control of certain devices to individuals.

Chapter 2 Installing Smart Operator

Computer System Requirements

Minimum computer system requirements exist for the Smart Operator (standalone version). Please verify that the computers you will be using for the Smart Operator meet the minimum requirements detailed below.

Smart Operator (Stand-alone) Configuration

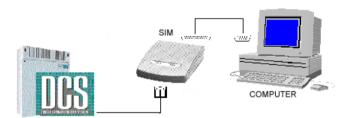
- IBM-compatible computer
- Intel 233Mhz or higher processor for first 250 devices*
- Windows NT 4.0 Workstation w/Service Pack 4
- 128 MB RAM (additional needed for over 300 devices)
- SVGA Accelerator Card
- 15" SVGA monitor w/True Color 24bit enabled (17" is recommended)
- 250 MB of available hard disk storage space
- Available serial port (Serial connection to telephone system)
- Available parallel port for the dongle(hardware key)
- PCI-based Network Interface Card
- TAPI 2.x for Windows NT
- * A dual Pentium processor is recommended for systems containing more than 300 devices.

Limitation

You cannot assign a DECT line as the Smart Operator's extension because of the functional difference between the DECT handset and the DCS handset.

Hardware Items Required

- For DCS / DCS400si / DCS | |:
 SIM (Serial Interface Module) with Telephone Line Cord and Serial Cable with a DB-25 male connector
- For DCS50si / Compact || :
 MISC Card and Serial Cable with a DB-9 male connector
- The other end connector of the serial cable should match the serial port connector on your PC
- A dongle(Hardware Key) provided with the Smart Operator software



Hardware Setup

For DCS / DCS400si / DCS II:

- 1. Connect the serial cable to the SIM and to a serial port on your computer.
- 2. Plug one end of the telephone line cord supplied with the SIM into the jack on the SIM.
- 3. Plug the other end of the telephone line cord into any jack on the DLI card of your DCS key telephone system.

For DCS50si / Compact II:

1. Connect the serial cable to a serial port on your key telephone system and to a serial port on your computer.

For all systems:

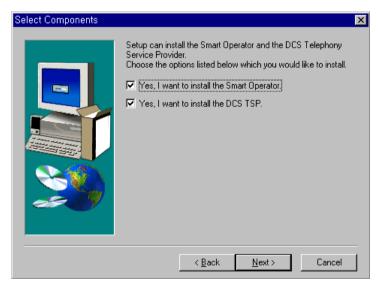
- 1. Note which serial port (referred to in the software as COM port) you have used, as this information will be required to set up the software correctly.
- 2. Plug the dongle into a parallel port.

Hardware setup is completed.

Installing Software

• Double click "E:\Smart Operator\Setup.exe", where E: is the CDROM drive.

Select the components you want to install. Click the Next button to continue Setup or the Cancel button to exit Setup.



If you mark both options, the Smart Operator will be installed and then, the DCS TSP installation will continue.

Installing Smart Operator

1. Click the Next button in the Welcome dialogue box to continue.



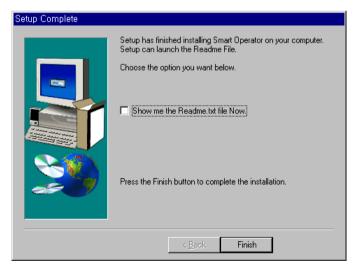
2. Choose the destination directory where the Smart Operator will be installed. The default directory is "C:\Program Files\Samsung Electronic\Smart Operator", where Operating System is installed at C: drive.





3. Enter the program folder name and click on Next.

4. Files are copied to your selected directory. The following dialog box appears.



Finish the Smart Operator setup by clicking on Finish.

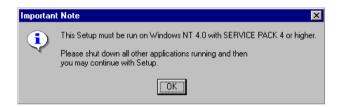
Installing Samsung DCS TSP

You must install the Samsung DCS TSP (Telephony Service Provider) for handling the events from/to Samsung DCS Key Telephone System. Its service name displayed at the **Control Panel->Services** window is **Samsung DCS Tapi Service**.

Follow the instructions in the Setup program. These instructions are described below.

Note

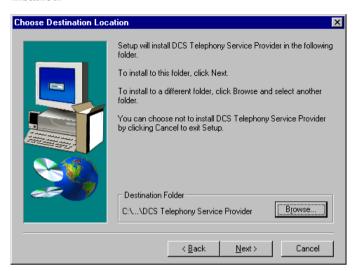
If you do not have Microsoft TAPI 2.1 Service installed on your NT system, you should install and start this service before installing the Smart Operator.



1. Click the Next button in the Welcome dialogue box to continue.



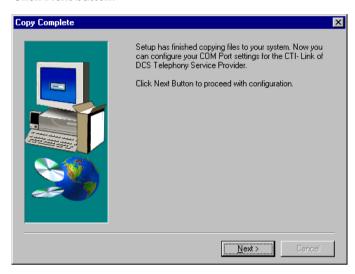
2. Choose the destination directory where the Samsung DCS TSP will be installed.



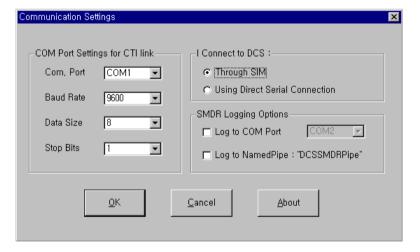
3. The following dialog box appears. Click Next after entering the program folder name.



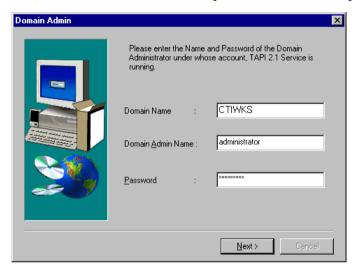
4. Files are copied to your selected directory. The following dialog box appears. Click Next button.



5. Set the COM port for your computer. Consult FAQ for the details.



6. If your computer system is a Primary Domain Controller, enter your PC's domain name, domain administrator name, and domain administrator's password. If not, enter the computer name of your PC into the Domain Name field, and its administrator name and password into the corresponding fields.



7. If you want to start the DCS TSP at server start up, click Yes. Otherwise click No.

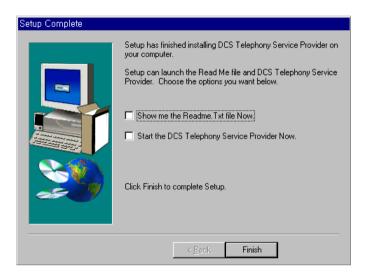


8. Mark your options and then, click on Finish.

Note

The dongle provided with the Smart Operator software must be connected to a parallel port of the computer before the DCS TSP is running. Verify that the parallel port is enabled. The DCS TSP queries the port at startup and at programmed intervals thereafter. If the DCS TSP does not detect the dongle's

programmed validation code, it repeatedly tries the DCS link initialization until it receives the valid response.



The Samsung DCS TSP setup is done.



Note

Restart your computer before using the Samsung DCS Tapi Service for the first time, to ensure the dongle driver's proper operation.

Chapter 3 Using Smart Operator

Getting Started

This chapter is the "User's Guide" section of this document. It may be useful to review the *Smart Operator Terminology*, prior to reading this chapter. Also, the VistaTDS and the Smart TAPI should have already been installed.

How to Launch Smart Operator

During the Smart Operator Installation, the Smart Notes application is added to your Startup Program folder. Thus, it is launched whenever you start your PC afterwards. This application should be running to ensure the proper operation of the SystemWide Note feature of the Smart Operator.

- Verify that the VistaTDS is installed and started as a Windows NT service.
 Once this service is installed and configured to start automatically, this step can be skipped.
- 2. Locate and double-click the Smart TAPI icon, then click the "Connect to DCS TSP" button.
- 3. Locate and double-click the Smart Operator icon.

For more details, refer to the following sections, **Installing VistaTDS Service**, **Configuring Smart TAPI**, and **Starting Smart Operator**.

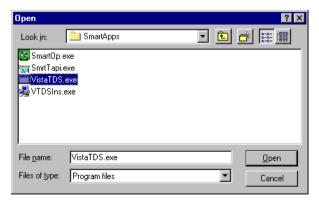
Installing VistaTDS Service

The VistaTDS Service must be installed on a PC running either Windows NT Server or Workstation. The VistaTDS Service is initially installed and started using VTDSIns.exe that will modify the Registry of the Windows Operating System and configure the service to be started each time the PC is shut down and re-started

Step 1...Locate and double click on the application VTDSIns.exe, or click on the **Start** button, select the Smart Operator's program folder and then click on "**VistaTDS Install**". This will launch the application's dialog as seen below:



Step 2...Click on the large button located in the top center of the dialog. Note...The button will display the default path and name of the VistaTDS Service file. This will display the "File Open" dialog.



Step 3...Using the "File Open" dialog, locate and double click on the file VistaTDS. This will close the dialog and re-display the application's dialog with the exact location of the VistaTDS Service now being displayed on the large button.

Note

All VistaTDS events can be saved to a file. This option is enabled by clicking on the button labeled "Turn Logging On". The file created will be saved in the same directory that the VistaTDS.exe file is located.



Step 4...Click the button labeled **Install Service**. This will display the "proceed with install" dialog. Click **Yes** button.



Step 5...If successful, the following dialog will be displayed. Click **Yes** button to start the service.

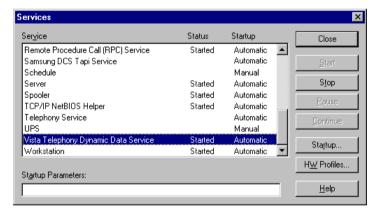


Step 6...The VistaTDS Service should now be running on the PC. The following dialog will be displayed to confirm this.



Verifying VistaTDS Status

To check if the VistaTDS Service is running, open the Services dialog located in the Control Panel. Verify that the service is set to automatic and that the service has been started.



Configuring Smart TAPI

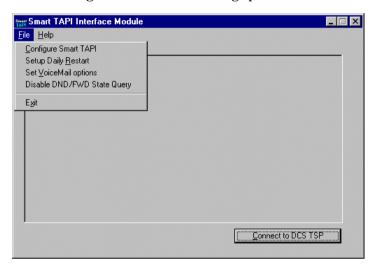
The Smart TAPI should be running while you use the Smart Operator because the Smart Operator connects to your telephone system via the Smart TAPI.

To launch the Smart TAPI, simply double click the icon or select the application from the Start menu.

Note

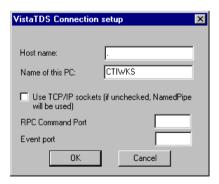
It is recommended that you launch the Smart TAPI at least one minute later booting your PC, not to disturb the DCS TSP initialization.

You can configure the Smart TAPI using options in "File" menu.



Configure Smart TAPI

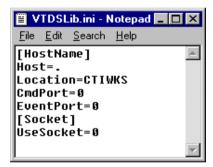
Select the **Configure Smart TAPI** option. The following dialog appears.



- **Host Name:** Identifies the PC that is running the VistaTDS. Place a single "." (dot) in this field to indicate the VistaTDS Service is located on the same PC on which the Smart Operator is installed (typical installation).
- Name of this PC: Enter the name used to identify this PC.
- Use TCP/IP: Named pipes are used for the stand-alone version of the Smart Operator. Leave this option unchecked.
- **RPC Command Port/Event Port:** These fields are effective only when TCP/IP option is checked. Leave these fields empty.

Note

The information collected from this dialog is stored in the **VTDSLib.ini** file. This file can be found in your Windows directory.



Setup Daily Restart

The Smart TAPI can be configured to automatically shutdown and restart once every twenty-four hours. This will allow the application to refresh various files and it should be configured to occur during a time that no activity will occur. Select the **Setup Daily Restart** option from "File" menu.

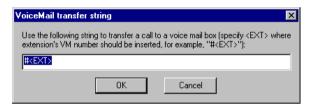


- 1. Click the check box to enable the option.
- 2. Enter the time (24 hour clock) that the restart should occur.
- 3. Click "OK" to save your changes and close the dialog.

Set VoiceMail Options

You can specify Voice Mail Transfer String with this option.

Select the **Set VoiceMail Options** option from "File" menu.



Enter your Voice Mail Transfer String in this dialog box. The contents of this string will depend on the particular voice mail system installed.

Examples

- "#<EXT>" is used for Samsung Cadence Voice Mail Card."#<EXT>" is set by default.
- "*<EXT>" is used for other Samsung Voice Mail Series.
- "," can be used for wait until connected. For example, "900, <EXT>" will dial "900" first and dial <EXT> after connection.
- "900" will dial 900.
- "<EXT>#" will dial <EXT> followed by "#".

Disable DND/FWD State Query

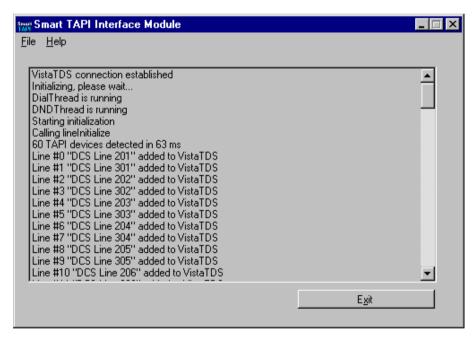
When the Smart TAPI makes connection to the DCS TSP, it examines each device's DND/FWD state. If you want to skip this, set the **Disable DND/FWD State Query** option from "File" menu.

Note

The Smart TAPI detects "All Call Forward" only.

Connect to DCS TSP

When the Smart TAPI starts, a connection is established between the Smart TAPI and the VistaTDS. To make a connection to the Samsung DCS TSP, click the "Connect to DCS TSP" button.



The devices connected to your telephony system are detected and added to the VistaTDS. DND/FWD state query is performed unless you set the **Disable DND/FWD State Query** option.

Starting Smart Operator

To start the Smart Operator application, using your mouse, click on the Start button located on the left side of the Task bar. Select Programs from the pop up menu, then click on the Smart Operator. If an icon for The Smart Operator was placed onto your desktop during installation, then double click the Smart Operator icon.



Note

Once the VistaTDS has been started, we do not recommend that you terminate the application or shut down the computer as this may result in the inability to process calls.

If you launch the application for the first time, you will be asked to establish the Connection with the VistaTDS, set User Information including My Extension and Username, and specify Caller ID Format.

You can change these settings using options in the Smart Operator's "File" menu later on.

After the Smart Operator enters the **READY** state, click the "Query System" button to request from the telephone system a list of all extensions currently configured and known to the VistaTDS.

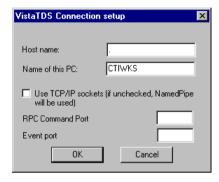
Note

The Smart Operator may sometimes be unable to display the call events that have occurred before the Smart Operator is launched.

Connecting to VistaTDS

If a connection to the VistaTDS has not been setup, the window above will be visible. A connection must be made to the VistaTDS prior to displaying any call activity.

Each field has exactly the same meaning as it has in the **Configure Smart TAPI** section.



Setting "User Information"

This dialog appears when you launch the Smart Operator for the first time. Enter the extension number for the Smart Operator and user name.



To reset My Ext, click on the device you want to change My Ext to in the BLF and click the right mouse button. Click on **Set as "My Extension"**. Refer **Busy Lamp Field/Set as "My Extension"** section for more detail.

Note

"My user name" is the user name for the Smart Message and is not used in the stand-alone environment. It is different from the telephone extension user name displayed on the BLF icon. If you want to change this telephone extension user name, use "Change Extension" option from the BLF popup menu.

Formatting Caller ID

Fill out the Caller ID Format field and length of the local phone numbers field as follows.



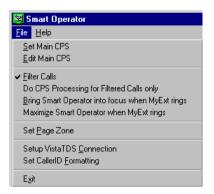
Caller ID Format:

- Use "?" to represent each digit.
- Put the area code-which is followed by local phone number- in parentheses.

For example, if you use a 3 digit area code followed by a 7 digit local phone number, enter (???)???-???? into the first field and 7 into the second field.

Customizing Smart Operator

To modify the Smart Operator options, click the "File" option on the menu bar. This will display the options/settings available as seen below.



Set Main CPS - This option makes it possible for the installer to select which Scenario will be used by the application. The user should never need to access this option and is encouraged to ignore this and the "**Edit Main CPS**" option.

Edit Main CPS - This will provide access to the application's Scenario Builder. Do not modify this form unless instructed to do so by a trained technician.

Note

Above two features related to the CPS do not work in this version of the Smart Operator (Smart Operator 3.1). They will be implemented in the future releases.

Filter Calls - By default, the Smart Operator is shipped with the **Filter Calls** option enabled. For those organizations that would like to see all call activities simply disable the filter by clicking "File" then **Filter Calls** from the main menu.

Do CPS Processing for Filtered Calls only - *This option should be enabled along with Filter Calls*. With this option enabled, only those calls that are for "My Ext." are monitored by the CPS (Call Processing Scenario). This option has no meaning in the stand-alone Smart Operator. It works when the Smart ACD module is installed together with the Smart Operator.

Bring Smart Operator into focus when MyExt rings - This option will bring the Smart Operator application into the foreground when a new call rings

your extension. If not selected, the active application will lose focus while the call is waiting to be answered by the user.

Maximize Smart Operator when MyExt rings - This option will maximize the Smart Operator application and bring it into the foreground when a new call rings your extension.

Set Page Zone – By default, Page Zone is set 0. You can change the default page zone with this option.

Setup VistaTDS connection - This option has been provided to allow the installer and user the ability to change the identity of the computer that is running the VistaTDS. You should never need to modify this setting unless the name of the Smart Operator Server has changed.

Set CallerID Formatting - This option has been provided to allow the installer and user the ability to change the caller ID format. Refer to the **Starting Smart Operator/Formatting Caller ID** section.

Help Contents

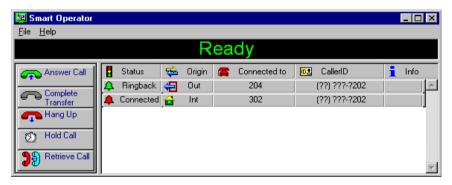
The Help Contents option will launch the Smart Operator on-line **User's Manual**.



Activity List

The Activity List displays the calls that are active (ringing, holding, and connected) at the Console's associated extension. When a call is presented (rings) to your telephone, the Smart Operator application will respond by displaying a message in the "InfoBanner" and popping the call into your Activity List. Any information that is related to the call such as caller ID or caller name will also be displayed.

To View the calls in the Activity list press the ↑ arrow key.



To select calls press the ↓ arrow key. You must select a call in order to process it, i.e. Answer, Transfer, Place on Hold, etc.



InfoBanner

The information banner is located at the top of the Smart Operator. It provides "live" help for the Operator. It will show you what to do when you have an incoming call.

Press "Enter" to answer this call

It provides help when doing a Supervised Transfer

"F4" to Release call, "F2" to Cancel

It tells you when you have another call coming in

You have another call waiting

These are just some examples of the information the Banner will provide.

Hiding the InfoBanner

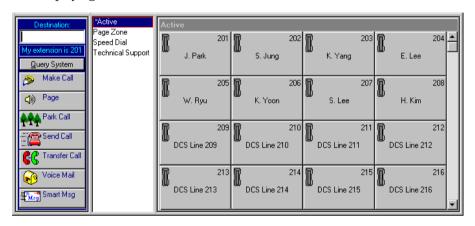
If you do not wish to view the InfoBanner, you can use your mouse to hide it. To do so,

- **Step 1...**Click the lower portion of the InfoBanner
- **Step 2...**While holding the button down, drag the bottom of the InfoBanner up towards the menu bar until the InfoBanner is no longer visible.



Busy Lamp Field (BLF)

The Busy Lamp Field is a very powerful application. For organizations with multiple locations, the BLF can display the status of users in remote offices. The BLF provides users of the Smart Operator with a customable busy lamp field displaying the current state of those extensions the user wishes to monitor.



Each member (icon) of the BLF can be sized as needed to display the information it contains or to fit a large number of BLF icons onto a single PC screen.

The BLF icon will display a small handset in the upper left corner. Based on the status of the icon's extension, the telephone will change color (red, yellow, green). The name associated with the icon is also displayed as is the status of DND and All Call FWD.

You can add BLF Groups, add members to these groups, drag and drop members from one group onto another, or delete a select number of members from a group.

Creating BLF Groups

Step 1...Be sure your mouse cursor is positioned over the BLF Group list box.

Step 2...With your cursor over the BLF list box, click the right mouse to display the "pop up" menu.



Step 3...Click on the **New BLF** option. This will display a new BLF Group dialog. Simply type in a name for this new BLF Group.



Step 4...Click on OK to save the new group.

Note

To add devices not belonging to any other group to your newly created BLF Group, see Adding Devices.

Note

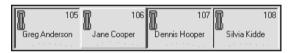
The new BLF group will not be saved unless at least one device is added to the group.

Adding Existing Devices to A BLF Group

If you wish to add devices to a BLF group and these devices belong to another group such as the "Active" (Query System). You can do the following:

Step 1...Hold down the **Ctrl** key.

Step 2...Click each extension icon you wish copied to the BLF group. You will notice that each icon clicked remains in the depressed state.



Step 3...Release the **Ctrl** key.

Step 4...Click any of the icons selected and while holding down the mouse button drag them onto the new BLF group. As you drag you will see 3 phones.



Step 5...Place the 3 phones over the group you want to add the new BLF cells

Step 6...Once they are over the BLF group release the mouse button.

Step 7...Click on the new BLF group that you have just add the BLF cells to, and size the cells as needed.

Note

Each BLF group will save how the icon has been sized.

Destroying BLF Groups

Step 1...Click on the BLF Group you wish to delete in the BLF Group list box.

Step 2...With your cursor over the selected BLF Group entry, click the right mouse to display the "pop up" menu.



Step 3...Select **Delete** option from the "pop-up" menu.

Step 4...Click on OK to confirm.



Set as "My Extension"

You can reset the extension of the Smart Operator with this option.

Note

You cannot assign a DECT line as the Smart Operator's extension because of the functional difference between the DECT handset and the DCS handset.

Step 1...Click on the BLF icon (Device) whose extension you wish to set as the Smart Operator's extension. This will cause the device to be maximized within the BLF group.

Step 2... With your cursor over the maximized device, click the right mouse button.



Step 3...Select the **Set as "My Extension"** option from the pop-up menu.

Step 4...You'll be asked if you wish to make that your new extension. Click on **OK**.



Step 5...The following dialog appears. You can enter another extension in this dialog. That number will then be the new extension. My user name has no relevance in the stand alone environment, as mentioned in the **Getting Started/Starting Smart Operator** Section.



Step 6...If you click **OK**, the Smart Operator gets new extension.



Adding Devices

- **Step 1...**Be sure to click the BLF Group you wish to modify.
- **Step 2...** With your cursor over the BLF Group list field, click the right mouse button.
- **Step 3...**Select the **New Extension** option from the "pop-up" menu.



Step 4...The following dialog will appear.



Extension #: Enter the extension number you wish to assign to this device.

Caption: Enter the caption to be displayed in the BLF field. This should be the person's name, the speed dial location or the name of the feature being added.

Dialable Address: Enter the number to be dialed to access the extension, feature, or telephone number.

Note

If the dialable address is an outgoing number be sure to include the outgoing access number.

The Add New Devices allows you to setup a BLF Group that contains speed dial numbers such as cellular phones, pagers etc. When you need to transfer the caller to a person's cellular phone, simply drag the call onto their speed dial number. This feature also allows you to set up a BLF icon with system feature codes and non-associated voicemail boxes.

Modifying Devices

To modify the contents of a BLF icon:

- **Step 1...**Click the BLF Group that contains the device you wish to modify.
- **Step 2...**With your mouse click on the device.
- **Step 3...** With your cursor over the maximized device, click the right mouse button. Select the **Change Extension** option from the "pop-up" menu.



Step 4...The following dialog appears.



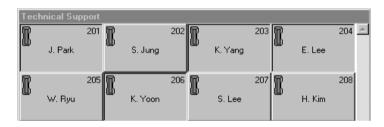
Extension #: This field contains the extension address and cannot be modified.

Caption: Modify the caption as desired.

Dialable Address: Enter the number to be dialed to access the extension, feature, or telephone number.

Deleting Devices

To delete a BLF icon or any number of devices perform the following: **Step 1...** While holding the **Ctrl** key, click on each of the extensions to be deleted.



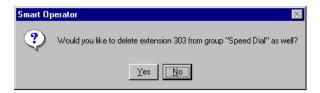
Step 2...Click the right mouse button to display the "pop-up" menu.



Step 3...Select the **Delete Extension** option.

Note

If the selected device(s) is also a member of another BLF Group, you will be prompted to remove the device from these groups as well.



Sorting BLF Devices

The BLF devices can be sorted by Caption or Number. To set how these devices are to be displayed in the BLF Group perform the following:

Step 1...Place your cursor over any device in the BLF Group.

Step 2...Click the right mouse button to display the "pop-up" menu.



Step 3...Select the **Sort by Name** option.

Note

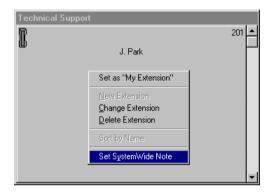
Sorting devices can be done on-the-fly. Your selected sort option will affect all BLF Groups.

Set SystemWide Note

Follow these procedures to create a system-wide message.

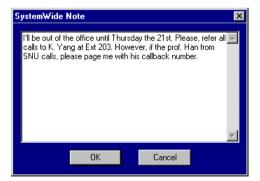
Step 1...Click on the BLF cell of the person for whom you are creating the message. This will bring it into focus by expanding the BLF cell to the size of the BLF window.

Step 2...Right mouse click over the selected BLF icon to display the pop-up menu.

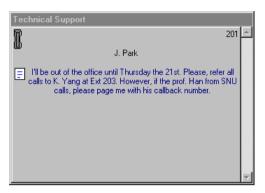


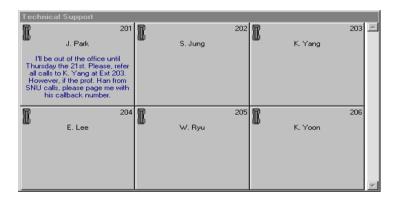
Step 3...Select the **Set SystemWide Note** option to display the Smart Notes dialog window.

Step 4...Enter the message you want displayed in the selected BLF icon. Maximum 256 characters are available.



Step 5...When done, click the "OK" button to set the message.





Tip...If you wish to modify the message, simply repeat the procedures used to create the message.

Note

The Smart Notes application MUST be running if you are using the System-wide Note feature. If the Smart Notes is NOT running and the VistaTDS is shut down, any notes that are stored in a BLF cell will be deleted.

Starting Smart Notes

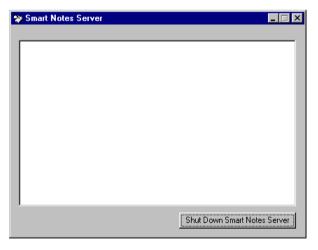


The Smart Notes application acts as a database table for storing system-wide notes available on the Smart Operator and protects them from being deleted from the TDS.

The Smart Notes is launched from the Startup Program folder whenever you boot your PC where the Smart Operator installed. If you want launch it manually, follow the steps below.

Step 1... To launch the Smart Notes, simply double click the **SmartNte.exe** icon or select the application from the Start menu.

Step 2... The VistaTDS Setup dialog will appear so that you can identify the location of the VistaTDS server. After completing the VistaTDS setup dialog, the Smart Notes window will appear as seen here.



Processing Calls

Call Processing Buttons

Incoming Call Processing Buttons

The Smart Operator contains two sets of call processing buttons. The upper most set is provided to handle incoming calls from trunks and other extensions. Most of the functions are mapped so that certain keys on the keyboard will simulate the clicking of the feature button. See Processing Calls for step-by-step instructions on processing all calls.



Answer Call



Click this button to answer a call

Complete Transfer



Click this button to complete a supervised transfer

Hang-Up



Click this button to disconnect the selected call in the Activity List

Hold Call



Places the selected call on hold.

Retrieve Call



• Click this button to Retrieve the selected call that is holding

Extension Call Processing Buttons

The buttons that are located next to the BLF are used for processing calls for a selected extension.



Destination



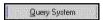
Use your keyboard's keypad to enter the extension or telephone number of the person you are calling or transferring a call to.

My Extension



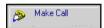
This field displays the associated device for the Smart Operator. You can modify this information as outlined in the **Busy Lamp Field/Set as "My Extension"** section.

Query System



This feature is used to request from the telephone system a list of all extensions currently configured and known to the VistaTDS. The Query System button is located above the extension call processing buttons. Clicking this button will display a dialog alerting you that the action you have requested may take several minutes.

Make Call



 Enter the extension or telephone numbers you wish to call in the Destination Field.

Page



Click this button to make an intercom Page

Park Call



Click this button to transfer a caller to hold at the selected extension.

Send Call



Click this button to a transfer a caller to the extension selected.

Transfer Call



• Click this button to Supervise a Transfer

Voice Mail



• Click this button to send the call to the designated voicemail

Smart Message



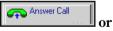
• Desktop-to-desktop Instant Messaging. This feature is not supported in this version of the Smart Operator application.

Processing Calls

Answering a Call

Step 1... Select the Call to be answered

Step 2...Click on the Call Processing Button



- Press "Enter" or
- Press F12

Answering Multiple Calls

While using the Smart Operator, you may encounter the need to simultaneously process multiple calls that are ringing at your telephone. The Smart Operator has been designed to assist you in doing this. For example, while connected to the first caller, a second call rings in. Your telephone will provide an audible indication of this new call by making a short "Ring".

Additionally, your Operator's "**Banner**" will notify you of another call as seen below:

You have another call waiting

To place your first call on hold and pick-up the second call perform the following tasks:

Step 1...While connected to the first call, inform the caller of the need to place them on hold.

Step 2...Then, press the "**Insert**" button (the first caller is placed on hold and you are **immediately** connected to the Ringing call).

Step 3...Once connected to the second call, Repeat Steps 1 and 2 or

- place the call on hold (**F9**) or
- transfer the call to the requested extension.

To return to the first call that is on hold:

Step 1...Press your down arrow ↓ key to select the call from the Activity List.

Step 2...Press **F7** or the "Enter" key.

You can use your up arrow \(\text{tey to view} \) all calls that are connected/ringing/holding in your Activity List.

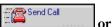
User Tip...If you have more than two calls on hold, you can select which call to retrieve by using your mouse. Using your mouse, click on the call to bring it into focus and then press "Enter" or F12.

Blind Transfer/Send Call

Step 1...Enter the extension or telephone number in the Destination Field or

• Click on the BLF icon you wish to transfer the call to

Step 2...Click on the Call Processing Button



- Press F11 or
- Press the "Star" key on the Numeric Keypad



or

Drag and Drop:

Step 1...While connected to the caller, click anywhere on the **Selected** call and hold down the mouse button

Step 2... "Drag" the call to the appropriate BLF device

Step 3...Release the mouse button

Supervised Transfer

Step 1...Enter the extension or telephone number in the Destination Field or

• Click on the BLF icon you wish to transfer the call to

Step 2...Click on the Call Processing Button



- Press F10 or
- Press the "Plus" key on the Numeric Keypad



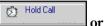
Step 3...If the call is accepted, Press **F4** to release the call

Step 4... If there was no answer or the call is **not** accepted, Press **F2** to cancel and F7 to Retrieve the call.

Place a call on HOLD

Step 1...While connected to a call

Step 2...Click on the Call Processing Button



- Press F9 or
- Press the "Minus" key on the Numeric Keypad



Retrieve a call On-Hold

Step 1...Select call to retrieve

Step 2...Click on the Call Processing Button



Press F7

Park a Call

Step 1...Enter extension in the Destination Field or

Click on the BLF icon

Step 2...Click on the Call Processing Button



Press F6

This option is best used when you need to place a caller at a person's extension and then page the user to pick up the holding call.

Make a Call

Step 1...Enter extension or telephone number in the Destination Field **or**

Click on the BLF icon programmed with the appropriate number

Step 2...Click on the Call Processing Button



Note

Press F5

If placing an outgoing call, be sure to include the outside trunk access number.

Page

Page to Default Page Zone

Step 1...Click on the Call Processing Button



- Press F3 or
- Press the "Division" key on the Numeric Keypad



Note

You can change the default page zone **use Set Page Zone** option form the "File" menu. See **Getting Started/Smart Operator Settings.**

Page to a Page Zone other than the Default Zone

With Destination Field

Step 1...Enter page zone number into the Destination Field.

Step 2...Click on the Call Processing Button, press **F3**, or press the "Division" key.

With BLF Group

You can create a BLF Group with the different Paging Zones. If you have created BLF icons with the different zones use the following steps.

Step 1... Select the Paging BLF Group

Step 2...Click on the BLF icon with the zone that you want

Step 3...Click on the Call Processing Button, press F3, or press the "Division" key

Note

During idle state, the user must lift the handset before performing the page.

Disconnect/Hang-up

Step 1...Select call

Step 2...Click on the Call Processing Button



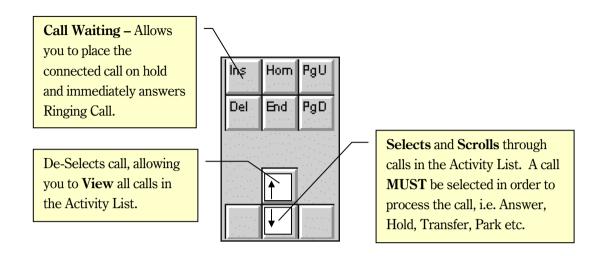
Press F2

Note

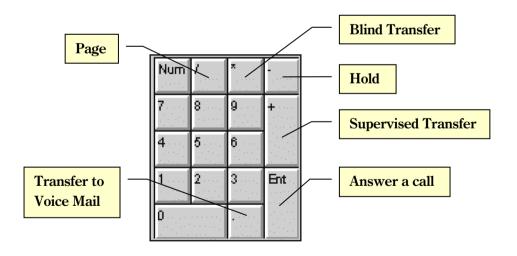
If the call (whether it is on hold, offering, connected etc.) Is in the *selected* state and you press *F2*, or you click on the call processing button, the call will be disconnected!

Key Legends

KEY	FUNCTION	
Enter	Answers a Call	
Numeric Keypad	Emulates telephone keypad	
Ctrl-N	Launches Smart Message	
Ctrl-C	Clears the selected call from the Activity List	
F1	Displays the Help File	
F2	Disconnects Call (Hang-up)	
F3	Page	
F4	Completes a Supervised Transfer	
F5	Make a Call	
F6	Park Call	
F7	Retrieve Held Call	
F8	Transfer Call to Voice Mail	
F9	Hold the Connected Call	
F10	Initiate a Supervised Transfer	
F11	Initiate a Blind Transfer	
F12	Answers a Call	



You can also use the Numeric Keypad to process calls. The following are the numeric keys and its associated function.



As you can see there are still some functions that will require the use of the "F" Keys, i.e. F2 to hang up, F4 to release a call, F7 to retrieve a call etc.

	Status
Color	
G rey	Indicates a device is idle.
Red	Indicates an active call at the specified device
Bhie	Call on Hold.
Green	New Call Ringing at a specific extension
Yellow	Device is off-hook.

Chapter 4 Glossary & Technical Bulletins

Smart Operator Terminology

Activity List—Portion of the main screen displaying the status of trunks, extensions and nodes.

BLF—Busy Lamp Field.

CPS(Call Processing Scenario)—An algorithm consisting of multiple "Events" which is capable of processing calls as specified by each Event.

Centrex—Business telephone service provided by the telephone company.

Console—A device used to receive and process calls.

CT—Computer Telephony. A telephone - PC interface providing information and call processing options to the end-user.

Devices—A device can be either an extension or trunk circuit. Each T1 span counts as 24 devices and each E1 span is 30. Phantom extensions, ACD groups, Paths and Workgroups are considered devices as well.

Domain—A domain is a logical grouping of network servers and computers that share information on users and security.

Dongle—A dongle is a mechanism for ensuring that only authorized users can copy or use specific software applications. Common mechanisms include a

hardware key that plugs into a parallel or serial port on a computer and that a software application accesses for verification before continuing to run; special key diskettes accessed in a similar manner; and registration numbers that are loaded into some form of ROM (read-only memory) at the factory or during system setup.

The dongle must always be connected to an I/O port of the computer while the program is running. Programs that use a dongle query the port at startup and at programmed intervals thereafter, and terminate if it does not respond with the dongle's programmed validation code.

If more than one application requires a dongle, multiple dongles can be daisychained together from the same port.

Extension—Telephone device that provides voice connectivity to other telephones.

Function Key—Buttons located on the top of the keyboard labeled F1 through F12.

GUI—Graphical User Interface

IM—Instant Message.

Named Pipe—A one-way or two-way pipe used for communications between a server process and one or more client processes. A server process specifies a name when it creates one or more instances of a named pipe. Each instance of the pipe can be connected to a client process that uses the pipe name to open a handle to the other end of the pipe.

Service—An executable object that is installed in a registry database maintained by the Service Control Manager. The executable file associated with a service can be started at boot time by a boot program or by the system, or it can be started on demand.

SMDR—Station Message Detail Recording

Socket—Software connection made between applications allowing communication between them while running on the same PC or on separate PCs over a network.

TCP/IP—Many network software vendors support Windows Sockets under network protocols including Transmission Control Protocol/Internet Protocol (TCP/IP), Xerox® Network System (XNS), Digital Equipment Corporation's DECNet ™ protocol, Novell® Corporation's Internet Packet Exchange/Sequenced Packed Exchange (IPX/SPX), and others. Although the present Windows Sockets specification defines the sockets abstraction for TCP/IP, any network protocol can comply with Windows Sockets by supplying its own version of the dynamic link library (DLL) that implements Windows Sockets. Examples of commercial applications written with Windows Sockets include X Window servers, terminal emulators, and electronic mail systems.

Trunk—Telephone line provided by the bell operating company.

TSP—Telephony Service Providers are the components that provide hardware- for service-specific functionality. When an application requests that a telephony device perform an action, TAPI service figures out which TSP services that device and makes a call to it. It is then up to the TSP to get the job done.

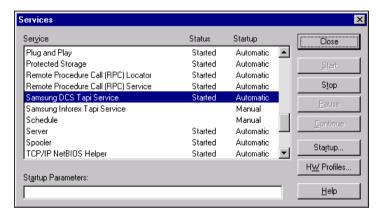
VistaTDS— Vista Telephony Data Service.

FAQ's

How can I change my COM port setting for the DCS TPS?

Step 1... Stop all TAPI applications that use the Samsung DCS Tapi Service.

Step 2... Open the Control Panel and double-click the "Services" icon.



See if the "Samsung DCS Tapi Service" is started or not. If this service has not been started, it takes some time at Step 3.

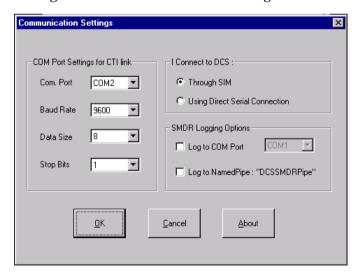
Step 3... Open Control Panel and double-click the "Telephony" icon.

Note

It may take some time to open "Telephony". This delay is caused form initializing the DCS TSP.



Select "Samsung DCS TSP for 3rd Party Call Control" and click on the "Configure..." button. Communication Settings window will be open.



The DCS TSP supports three options for running it.

1. COM Port Settings for CTI link

* The Default Port: COM 1

2. I Connect to DCS

• Through SIM: DCS/DCS400si/DCS||

• Using Direct Serial Connection: DCS50si/Compact ||

* The Default Connection Type: Through SIM

3. SMDR Logging Options

The DCS TSP can display the DCS system's SMDR Data in three ways.

- To DCS TSP Protocol Monitor This Program is installed with the DCS TSP together. Locate and double click "PMonitor.exe", or open "DCS Telephony Service Provider" program folder and click "DCS-CTI Link Monitor" form the Start button, to run this program. This is the default option.
- Log To COM Port If you select this option, the DCS TSP send the SMDR data from Switch to the specified Port. You can use SMDR data for your own purpose with this option.

Note

You cannot use the same port for the CTI Link Port and SMDR Output Port. If so, you will receive the warning message and your action will be ignored.

 Log To NamedPipe: "DCSSMDRPipe" - Using a Pipe, SMDR data can be printed. You can see this data with "SMDRLOgTester.exe" installed together with the DCS TSP. After changing the Options you want to change, Click OK Button.



Click OK to continue.

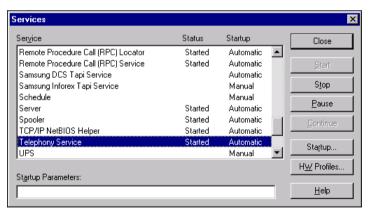
Step 4... Close the "Dialing Properties" window above.

Note

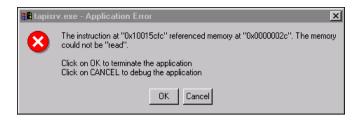
If you restart your PC now, the rest of COM port setting procedures (step5~step7) will be performed automatically. Before restarting, do not forget to change the serial cable connection to your PC to the new port.

Step 5... Open the control panel and double-click the "Services" icon. Verify that the "Samsung DCS Tapi Service" is stopped.

After stopping the DCS TSP, stop the "Telephony Service", too.



If the following error occurs during this step, ignore it.



Step 6... Change the serial cable connection to your PC to the new port.

Step 7... Open control panel->Services. Start the "Samsung DCS Tapi Service". The "Telephony Service" will be started automatically.

Note

It takes some time for the DCS TSP to initialize the link between the DCS System and the Telephony Service (Device Download Procedure). If there are many services in the DCS System, it will take at least $1\sim2$ minutes.

COM port setting is done. Now you can run the Smart Operator application.

Note

If you encounter any problems you cannot solve while changing the Telephony Configuration, restart your PC.

Check Points for CTI Link

- 1. Is the Dongle (hardware key) provided with the software, plugged into your PC's enabled parallel port?
 - If the Dongle is unplugged or mismatched, the "Samsung DCS Tapi Service" is unable to initialize.
 - If the parallel port where the dongle plugged is not enabled, the dongle driver can not run.

- 2. Do you connect the serial cable to the appropriate COM port?
- 3. Is the CTI Link type proper to your DCS system (SIM or Direct Serial Connection)?
- 4. Do you configure COM port parameter properly?
 - The default Baud Rate is 9600. Do not change this default value.
- 5. Check the configuration and parameters of DCS system's I/O settings. For CTI Link, the following type is supported at MMC 804.
 - CTI, CTI/SMDR, CTI/UCD, CTI/SMDR/UCD

MMC 804 System I/O Parameter

Parameter Options					
Dial 0	Service	Type of Service			
Dial 1	Baud Rate	Speed			
Dial 2	Char Length	Character Length			
Dial 3	Parity	Parity Bit			
Dial 4	Retry Count	Number of Retries			
Dial 5	Stop Bit	Stop Bit			
Dial 6	Wait Time	Message Wait Time			
Dial 7	SIM Pair	Station Number Connected to SIM			
Service Type					
Dial 0	CTI	CTI			
Dial 1	CTI/SMDR	CTI and SMDR			
Dial 2	CTI/UCD REPT	CTI			
		UCD Report on request by the Supervisor			
Dial 3	CTI/SMDR/UCD	CTI			
		Both SMDR and UCD Report will be generated			
Speed					
Dial 0	1200 bps				
Dial 1	2400 bps				
Dial 2	4800 bps				
Dial 3	9600 bps	Default			
Dial 4	19200 bps				

Dial 7	7 bits	
Dial 8	8 bits	Default
Parity		
Dial 0	None	Default
Dial 1	Odd	
Dial 2	Even	
Stop Bi	t	
Dial 1	1 bit	Default
Dial 2	2 bit	

Can I operate RAS(Remote Access Server) service together with DCS TSP?

Yes! as long as you follow the COM port setting guidelines below.

This is a typical COM port configuration.

COM Port No.	Address	IRQ	
COM1	3F8h	4	Serial Port 1
COM2	2F8h	3	Serial Port 2
COM3	3F8h	4	Serial Port 1
COM4	2F8h	3	Serial Port 2

If you want to run RAS service and the DCS TSP on the same PC, you must use the same serial port for both services. For example, if you install your modem at COM3 for RAS service, you should assign COM1 for the DCS TSP and vice versa.

If you assign different serial ports for RAS service and the DCS TSP, such as COM1 for a modem and COM2 for the DCS TSP, only one of those services will work.

Can I use the PCDPM Module to connect the DCS with Smart Operator?

No! The PCDPM will only support speeds up to 4800 baud. This has been found unacceptable due to the volume of data sent between the two systems. The Smart Operator needs a minimum of 9600 baud. Additionally, the PCDPM causes delays in processing call data.

Can I use a serial port located on the OPC card?

No! The port does not receive a guaranteed time from the processor to meet the demands placed on it by the Smart Operator application. The results of using the OPC will be unpredictable and not supported.

How do I uninstall Smart Operator application?

- 1. Terminate the Smart Operator if it is running.
- 2. Exit the Smart TAPI.
- Open Control Panel->Services. Stop the "Vista Telephony Dynamic Data Service". Then, click the "Startup" button in the Services dialog and mark "Disabled".
- 4. Open the Smart Operator program folder and click on "Uninstall Smart Operator".

Can Smart Operator application be used to enhance the DCS systems features?

Yes! The Smart Operator can be installed in the equipment room with the DCS system and provide unlimited routing options to calls received by the DCS. For example, you can setup a Scenario to monitor caller ID, ANI, or DNIS and route the call to specific hunt groups or ACD queues.

Can Smart Operator forward-unanswered calls to another device?

Yes! The Smart Operator can be configured to forward-unanswered calls to another extension device, an application extension or auto attendant greeting.

Troubleshooting

I have repainting problem!

Repainting problems may occur when you maximize the Smart Operator, and run other programs on the foreground.

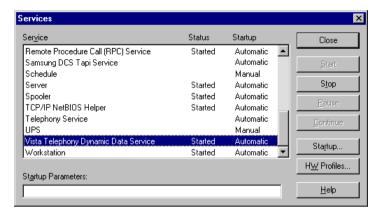
To prevent this problem, open **control panel**, click on the **Display** icon. Select **Plus!** tab and clear the "**Show window contents while dragging**" check box as shown below.



I can not connect to VistaTDS!

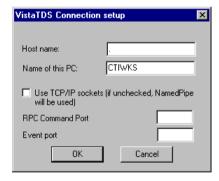
Verify that you have properly installed the VistaTDS according to its installation guidelines. A key point to remember is that the VistaTDS must run as a service on NT only.

Open the control panel and click on Services icon. Verify that the VistaTDS is started as shown here.



If the VistaTDS seems to be OK, check your TDS connection setup.

Place "." in the host name field, enter the name of your machine into Name or this PC field, and leave the check box unchecked.



Note

RPC Command Port and Event Port are not effective in the stand-alone configuration. These fields can have any value including blanks.

Open the **VTDSLib.ini** file located in the Windows directory and verify the information is correct.

I can not make connection between Smart TAPI and DCS TSP!

It takes several minutes for the Smart TAPI to connect to the DCS TSP for the first time. Be patient and wait for a while.

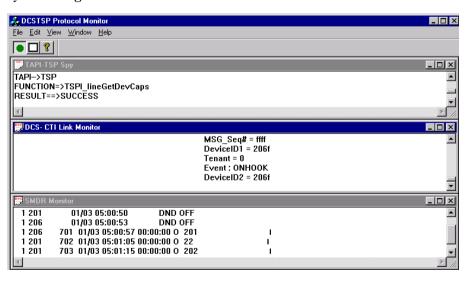
Note

When the Smart TAPI tries to connect the DCS TSP, it starts the Telephony Service and the Samsung DCS Tapi Service automatically if they have not been started. You need not worry about starting those services.

It is recommended that you launch the Smart TAPI at least one minute later booting your PC, to do not disturb the DCS TSP initialization.

Monitoring Telephony Messages

You can monitor the messages between the DCS system and the computer system using Pmonitor.exe installed with the DCS TSP.



The first sub window shows function call messages between the "Telephony Service" and the "Samsung DCS Tapi Service".

The second one shows event messages between the "Samsung DCS Tapi Service" and the DCS system.

The last one displays SMDR Messages.

When you start the PMonitor for the first time, you will be requested to enter the name of the server on which the "Telephony Service" runs.



Enter your PC name here.

I cannot disconnect Samsung DCS TSP from the serial port!

You may want to use the serial port assigned to the Samsung DCS TSP for other peripherals. If you simply plug out the serial cable from the PC and assign the serial port for some other peripheral, it will not work because the DCS TSP still running on that serial port.

How to disconnect the DCS TSP from the serial port:

- 1. Open Control Panel->Services. Stop the "Samsung DCS Tapi Service".
- 2-1. Click Startup in the Services dialog. Mark Disabled. Or,
- 2-2. Open Control Panel->Telephony->Telephony Drivers. Remove the "Samsung DCS TSP for 3rd party call control".

To restore the serial port connection to the DCS TSP:

- 1. Stop the service using the serial port if any.
- 2-1. Open Control Panel->Services->Startup. Mark Automatic or Manual. Or,
- 2-2. Open Control Panel->Telephony->Telephony Drivers. Add the "Samsung DCS TSP for 3rd party call control".
- 3. Open Control Panel->Services. Start the "Samsung DCS Tapi Service".

I added new DCS cards while running Smart Operator!

You should exit the Smart TAPI and restart it to initialize the Smart TAPI with your newly inserted cards. Then click on **Query System** at the Smart Operator to detect new extensions if any.

Smart Operator is inoperable!

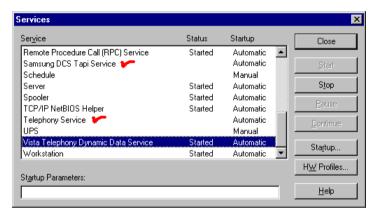
At first, check the cabling.

- 1. If the Dongle(hardware key) is unplugged, plug it in.
- 2. Check the serial cable between the serial interface module and the serial port on your PC. If either connector at each end of the serial cable is unplugged, unplug both connectors and also unplug the telephony line cord from the serial interface module. Wait about 10 seconds. Then, plug the connectors and the telephony line appropriately.
- 3. If the telephony line cord between the serial interface module and your DCS System is unplugged, plug it in.

Then, follow steps below.

Step 1...Restart your the Smart TAPI and the Smart Operator.

Step 2...If step 1 doesn't work, open the control panel and click on the "Services" icon. Stop the "Samsung DCS Tapi Service" and the "Telephony Service".



Restart those services. Do Step 1 again.

Step 3...If Step2 doesn't work either, restart your PC.

I can not display Caller ID correctly!

Check your caller ID format. See the **Starting Smart Operator/Formatting Caller ID** section in chapter3. If the length of an incoming caller ID is shorter than that of the format, the unknown fields are filled with "?"s.

I can not save New BLF Group!

A new BLF Group will be saved only if it has more than one device. Be sure to add devices to a new group.

Tip...Every time you make a new BLF Group, click on its new BLF Group entry in the BLF Group list box to confirm the creation.

See the **Creating BLF Groups** section in chapter3 for more information.

I can not save $SystemWide\ Notes$

Make sure that the Smart Notes application is running.

The Smart Notes application acts as a database table for storing system-wide notes available on the Smart Operator and protects them from being deleted from the TDS.

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