The Personal Agent Quick Reference provides a feature overview for the Personal Agent. The Personal Agent is a feature-rich on-line user interface for the MCP IP Telephony solution. Through the Personal Agent, you can enter your personal information, and configure services to your personal preferences. The browser-based format allows you to manage your preferences from any location with no software download. We recommend that you keep your Personal Agent open when following the steps described in this document. Screen captures shown in this document feature Internet Explorer as the default browser. However if you are using another browser your screen may look slightly different.

The Personal Agent Quick Reference does not contain specific configuration or information for a particular system. If you have questions regarding specific information about your system, please contact your next level of support.

Additional documentation
For more information, access the detailed Personal Agent User Guide available on CD, use the on product Help, or talk to your system administrator.

Contacting support
If you have questions or encounter any issues, contact your system administrator.
Getting Started

Getting Started

Quick Start landing page

Access to Personal Agent services and features:
- **Routes** – define how to screen and route incoming calls.
- **Preferences** – manage account and personal information.
- **Directory** – create, view, and manage personal and global address books.
- **Call Logs** – view and make calls from your inbox and outbox.
- **Click to Call** – establish a call between you and another person.
- **Multimedia Web Client** – optional client used for making calls.
- **Help** – access to online help.
- **Logout** – log out of the Personal Agent.

Quick Start landing page

1. Start your Web browser.
2. From your Web browser, enter the URL (provided by your service provider or system administrator) for the Personal Agent.
3. Click enter. The Personal Agent welcome page appears.
4. Enter your user name, domain name, and password.
5. Click **Login**.

Preferences

- **Personal**
  - Enter or change your contact information.
- **Password**
  - Change your password.
- **Picture**
  - Upload or update a picture.
- **My Times**
  - Predefine day and time ranges for your routes and rules.

- **i200x**
  - Manage your i2002/i2004 information.

- **Services**
  - View your service package details.
  - Modify your presence services information.
  - View and modify your Meet Me Conferencing settings.
Define how you want to manage your incoming calls by specifying the routing and filtering of your calls.

- Define and order routes for how your incoming calls are handled.
- Specify conditions as to how specific calls should be presented to you, and on what devices, in a simultaneous or sequential fashion.
- Define personalized time blocks to further define your routes so that you are always in reach.
- Send an Instant Message (IM) when processing a ring list.

The Route Wizard is a step-by-step process that you use to create a new route or modify an existing route. The Route Wizard starts from the List of routes page and from the New or Modify button. Using the Route Wizard you can:

- Define and order routes for how your incoming calls are handled.
- Specify conditions as to how specific calls should be presented to you, and on what devices, in a simultaneous or sequential fashion.
- Define personalized time blocks to further define your routes so that you are always in reach.
- Send an Instant Message (IM) when processing a ring list.

Step 1: Initiating Action

Specifies the main action or actions that initiates the processing of the route. In the current release, the only option that you can select is “When a call is received.”

Route Wizard step navigation buttons (Cancel, Back, Next, Finish) enable you to transition between the Route Wizard steps and the ability to cancel creation or modification of the route.
Step 2: Conditions

- Specifies the filtering of conditions respective to the call originator and the time of day that must apply before the Actions in Step 3 can take place.

**Step 2: Conditions**

(From THESE PEOPLE in my Personal Address Book).

Hyperlinks in Route details window enable quick navigation of Route Wizard.

- Checkbox to select desired conditions.
- Hyperlinks in Conditions window enable you to provide details of Condition criteria.

Select people from personal address book

<table>
<thead>
<tr>
<th>Select</th>
<th>Friend</th>
<th>Nickname</th>
<th>Last name</th>
<th>First name</th>
<th>Group</th>
</tr>
</thead>
<tbody>
<tr>
<td>☑</td>
<td>Brown</td>
<td>Maggie</td>
<td>Brown</td>
<td>Maggie</td>
<td>Not available</td>
</tr>
<tr>
<td>☑</td>
<td>Burns</td>
<td>Evelyn</td>
<td>Burns</td>
<td>Evelyn</td>
<td>Not available</td>
</tr>
<tr>
<td>☑</td>
<td>Burns</td>
<td>Teddy</td>
<td>Burns</td>
<td>Teddy</td>
<td>Not available</td>
</tr>
<tr>
<td>☑</td>
<td>Forbes</td>
<td>Marney</td>
<td>Forbes</td>
<td>Marney</td>
<td>Home</td>
</tr>
<tr>
<td>☑</td>
<td>Jones</td>
<td>Monika</td>
<td>Jones</td>
<td>Monika</td>
<td>Not available</td>
</tr>
</tbody>
</table>

- Checkboxes enable you to select a contact.
- Click Select all to select all contacts displayed.
- Click OK to accept the selected contact (or contacts), or Cancel, to quit this page.

Provides ability to narrow scope of Personal Address Book contacts that are displayed for selection.
Step 2: Conditions (From THESE PEOPLE in the Global Address Book).

Enter search criteria to display candidate users for selection.

Checkboxes enable you to select a user.

Click **Select all** to select all users displayed.

Click **OK** to accept the selected user (or users), or **Cancel**, to quit this page.

Step 2: Conditions (From THESE GROUPS in Directory).

Checkboxes enable you to select a group or click **Select all** to select all groups displayed.

Click **OK** to accept the selected group (or groups), or **Cancel**, to quit this page.

Step 2: Conditions (Call From THESE TELEPHONE NUMBERS).

Enter a list of phone numbers or SIP address(es), one per line. Press Enter to move to next line.

Enter telephone number(s) below. Place one number per line.

Click **OK** to accept the selected group (or groups), or **Cancel**, to quit this page.
Step 2: Conditions (Received in SPECIFIC DAY/TIME RANGES).

Checkboxes to select desired My Time Day/Time ranges for conditions.

Step 3: Actions

- Specifies what action, or actions, are performed when a call is received. Actions are defined with respect to the services, such as Advanced Screening, enabled in your service package. Voicemail actions are only enabled when you are subscribed to the Voicemail service.

Actions are mutually exclusive (via option button).

Hyperlinks in conditions enable you to provide Ordered List details or specify Rejection Messages.
Step 3: Actions

(Ring THESE NUMBERS) in my list.

- **Checkboxes to select the desired actions for the ordered list.**
- **Drop down menu to choose how many times to ring the specified numbers.** The specified numbers will ring at the same time.
- **Used to specify numbers that will ring (simultaneously) at the same time when routing a call to this ordered list.**
- **Instant Message sent when processing Ordered List.**

Web page pushed when processing Ordered List.

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**Step 4: Exceptions**

- Exceptions to the filtering conditions defined in Step 2. The method for specifying Exceptions is consistent with the method for specifying Conditions.

- **Option button for selecting desired rejection message.**
- **Buttons to create, modify, and delete rejection messages.**
- **Checkboxes to select desired criteria.**
- **Hyperlinks in Exceptions window enable you to provide details of Exception criteria.**
**Step 5: Finish**

Provide the name of the Route (this must be uniquely named).

Specify whether the route should be actively used to handle calls.

**Directory**

- Maintain Personal Address Book of contacts and groups of contacts.
- Provides enhanced Global Address Book search and sort capabilities.
- Provides Click to Call capability from Personal Address book and Global Address Book.
- Provides ability to determine Presence of contact in Personal Address Book or subscriber listed in the Global Address Book.

**Personal Address Book – List View**

Use to select address book display view.

Click hyperlink to see details of the address book contact; edit contact from the details page.

Checkbox to select contacts to delete.

Click View all to expand list to display all contacts in personal address book.

Use column headers to sort address book (ascending and descending).

Click hyperlink to initiate a call to the address book contact through the Click to Call page.

Click icons to add, delete, contacts and contact groups.
Personal Address Book – Card View

User's Picture ID. The dark silhouette is displayed when no picture of the contact is available.

Checkbox to select contacts to add, delete or group in Personal address book.

Use hyperlinks to see details of address book entry. You can choose to edit the contact from the details page.

Global Address Book - List View

Use the dropdown menus along with the search button to narrow address book displayed list.

Use hyperlink to see details of the user.

Use New, Delete and Groups to add or edit 'Selected' users to your Personal Address book.

Use hyperlinks to initiate call to a user through the Click to Call feature.
Click to Call

- Initiates calls to contacts in your personal address book as well as to the global address book.
- Establishes a call to the originating device, then refers the originating device to the specified phone number or SIP Address to complete the call to the terminating device. The originating device must answer the call.
- To access, click the Click to Call icon, or click the Call hyperlink in the Call column (List view) or the phone number or SIP address hyperlink (Card view) for the contact global address book.

Use SIP Address and Phone field hyperlink to initiate a call to a user through the Click to Call feature.

Select the device that you wish to use to originate the call. Call could originate from SIP Client, or PSTN number.

SIP Address or phone number for the who you want to call.