

MXIE 5.0 Quick User Guide

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MXIE is the software interface by which system users can access MX services and resources. This guide introduces the most frequently used MXIE operations. This document covers features and functionality in MXIE version 5.0. Previous versions of MXIE may not support all the features outlined in this document.

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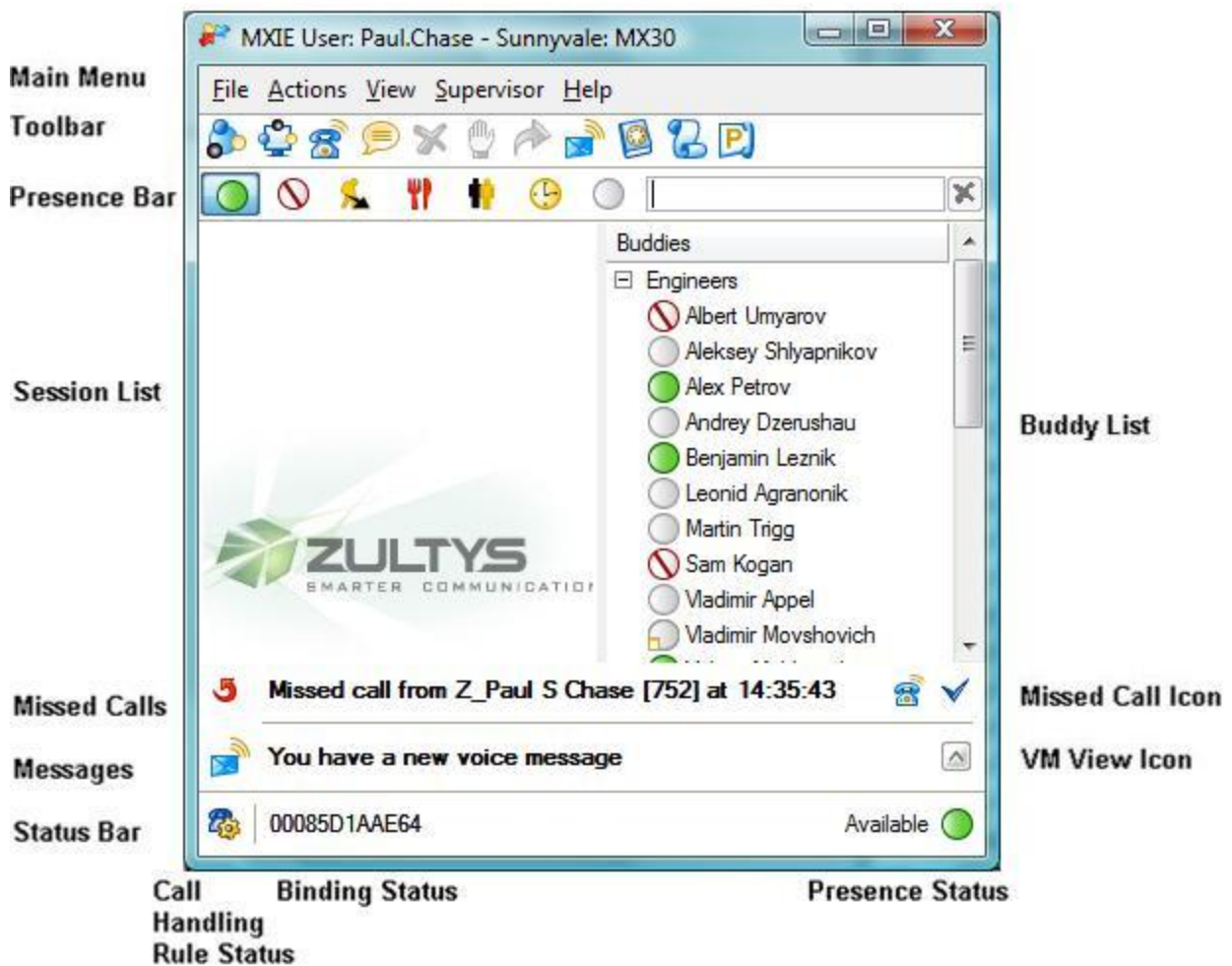
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2 Introduction

MXIE is the software interface by which system users can access MX services and resources. This guide introduces the most frequently used MXIE operations. It is assumed that the user is using version 5.0 of MXIE. Previous versions may not support all outlined features.

System Requirements: Windows 2000, 1 Gb memory (when using TAPI, Softphone and Outlook integration), 80 Mb on hard drive, sound card with microphone attached (quality headphones with the attached microphone is preferred, some laptop speakers can cause echo with built in microphone).



3 MXIE Window Components

The MXIE users' window is the primary window for accessing MX services. The following sections describe window components.

3.1 Toolbar

Each toolbar icon represents a communication method, session tool, or system utility. Press a toolbar icon to perform the associated function.

3.2 Presence Bar


The Presence bar provides a button for each presence state specified in the Toolbar Preferences panel (File | Preferences). The depressed button indicates your presence state. You can change your presence state by pressing a presence bar button.

3.3 Session List

The Session List is separated into role partitions containing the session blocks that represent your open communications sessions. You can perform session control functions through keyboard shortcuts, session control buttons, or drag and drop operations.



4 Keyboard Shortcuts




Available MXIE keyboard shortcuts.

| Keyboard Key | Action |
|---|---|
| A or a | Accept a chat invitation |
| D or d | Disconnect a chat session or voice call |
| H or h. | Place an active voice call on hold or retrieve a call on hold |
| P or p | Park an active call |
| R or r | Reject a chat invitation |
| T or t | Transfer (unattended) voice call |
| V or v | Send an incoming voice call to voice mail |
|  | Dials highlighted number from any application |

5 Session Control Buttons

Session control buttons, when enabled in the Calls Preferences panel, are located on the right side of each session block. MXIE provides the following session control buttons:

| Button | Action |
|---|---|
|  | Transfer: sends a voice call to another user. |
|  | Hold: places a voice call on hold |

| | |
|---|--|
|  | Disconnect: rejects a chat invitation, sends an incoming voice call to voice mail, or disconnects a session. |
|  | Answer: accepts a chat invitation |
|  | Retrieve: resumes a call previously placed on hold |

6 Buddy List

The Buddy List displays MX users with whom you are in regular contact. You can quickly initiate instant messages, chats, and voice calls with Buddy List members. The Buddy List displays the presence state for all buddies that permit others to view their presence and provides tools to send voice mail to your buddies. You can also organize your Buddy List into Buddy groups.

- To add a user to the buddy list, open the address book and display the contact list. Highlight the name of the person that you wish to add, press the right mouse button, and select Buddy. You cannot modify the buddy list for operator and agent roles.
- To add a buddy group to the list, point at the buddy list, click the right mouse button, and select Create a Group.
- To initiate communication sessions with buddy list members, point at a buddy and click the right mouse button.
- To perform Buddy Group operations, right click on your buddy list and select the desired operation. You can drag and drop buddy list members into any group. Users can belong to more than one buddy group.

7 Status Bar

The Status bar is located at the bottom of the MXIE user window. The left side of the status bar displays the call handling rule status and the binding status. The right side of the bar displays the presence status.


8 Instant Messages and Chats

Instant Messages and Chats are methods of exchanging text messages with other MXIE users.

9 Instant Messages

An instant message is a single text message.

9.1 To send an instant message:

- **Toolbar:** press the instant message icon  and type the recipient's extension or user name in the resulting dialog box
- **Main Menu:** select Actions | Instant Message and type the user name or extension of the recipient in the resulting dialog box
- **Buddy List:** double-click on the recipient's icon
- **Address Book or Buddy List:** right click the mouse over the recipient's name and select Send instant message
- **Address Book or Buddy List:** drag a buddy list icon or address book entry onto the instant message icon in the toolbar

When you receive an instant message, MXIE opens a message window. The message persists until you close the window.

10 Voice Calls

You can send and receive voice calls through any SIP device that supports voice communication.

11 Device Management

A managed device is listed in the MX device database and assigned an MX device ID.

An unmanaged device is a device that is connected to the MX but is not listed in the MX device database and is not assigned an MX device ID.

Unmanaged devices can perform voice calls using system resources if its address of record is configured as a registered contact.

A registered contact is either:

- a managed device that the MX administrator has assigned to your user account.
- an unmanaged device that has an address of record that is constructed with either your user name or extension and with the domain name of your MX system.

Address of record examples with this construction include:

Charlie.Smith@company.com and 7879@company.com.

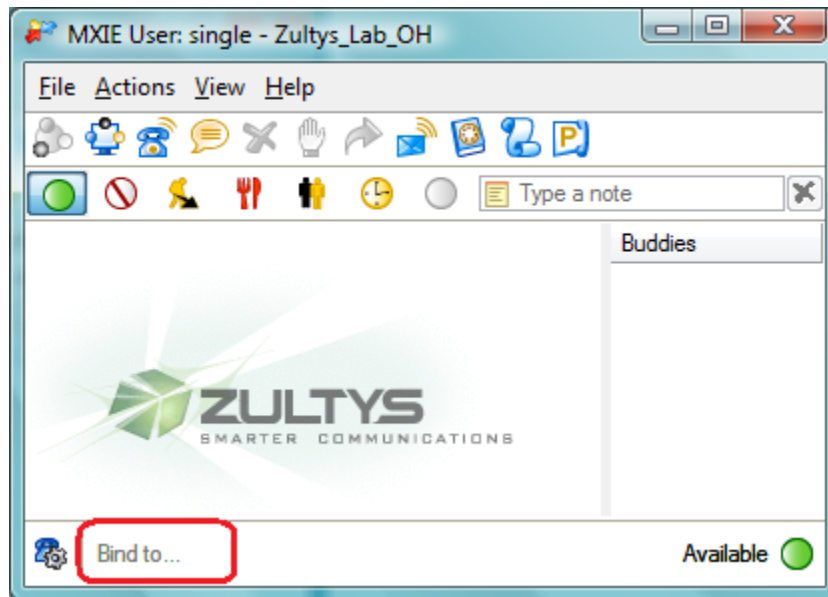
12 Binding a Phone

A MXIE instance can manipulate voice calls through a registered contact regardless of its binding status. A MXIE instance can initiate voice calls and handle multiple

voice calls only through SIP devices to which it is bound. MXIE instances can be bound to only one device at a time. The Bind a Phone window binds a MXIE instance to a SIP device.

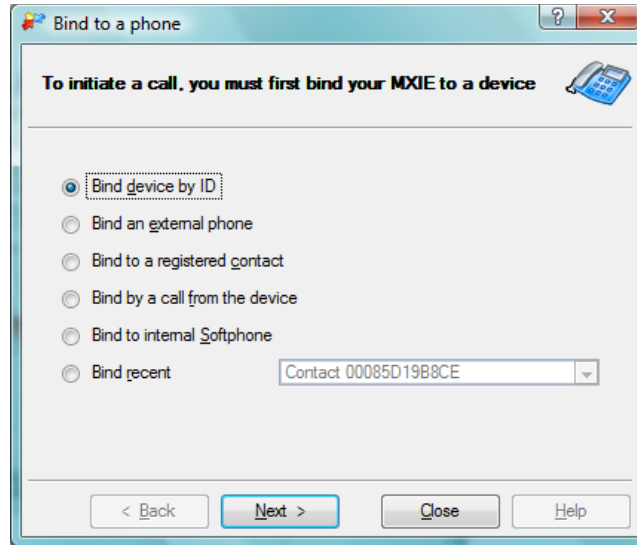
To access the Bind a Phone window:

- **Main Menu:** select File | Bind To
- **Status Bar:** press the binding status text



A MXIE instance can manipulate voice calls through a registered contact regardless of its binding status. A MXIE instance can initiate voice calls and handle multiple voice calls only through SIP devices to which it is bound. The Bind a Phone window binds your MXIE instance to a SIP device. To access this window, select File | Bind To from the main menu bar or select the binding status text in the Status Bar.

MXIE instances can be bound to only one device at a time. Binding a MXIE instance to a SIP device cancels any previous device binding to that instance.



12.1 Binding Status

The text in the top panel indicates the binding status of the MXIE instance and to which device, if any, the instance is bound. This panel refers to a SIP device as a device or as a contact, which are defined as follows:

- **Device:** This term indicates that the instance is bound to a managed device. You can bind to any managed device that has not been restricted by another user through a Device Access Policy preference assignment.
- **Contact:** This term indicates that the instance is bound to a registered contact. The Device Access Policy preferences window controls user access to your registered contacts.

12.2 Bind Device by ID

This option binds your MXIE instance to an MX managed device. To bind MXIE to a managed device:

12.3 Bind to External Phone

ConnectAnywhere is a feature which allows users to Bind MXIE to any telephone number in the world. Once bound to a phone number, when the User / Agent initiates a call from MXIE, the MX system will firstly call the user at the bound phone number, when that call is answered MX will then initiate a call to the phone number that the User / Agent called from MXIE. Once connected all standard MXIE functions are available such as Hold and Transfer. For incoming calls, the MX system will initiate an outgoing call to the bound phone number and at the same time display the callers' details in MXIE, all standard call functions are available from MXIE. This feature allows users to make and receive calls as if they are in the office from any location in the world where they have access to a landline or mobile phone.

12.4 Bind Registered Contact

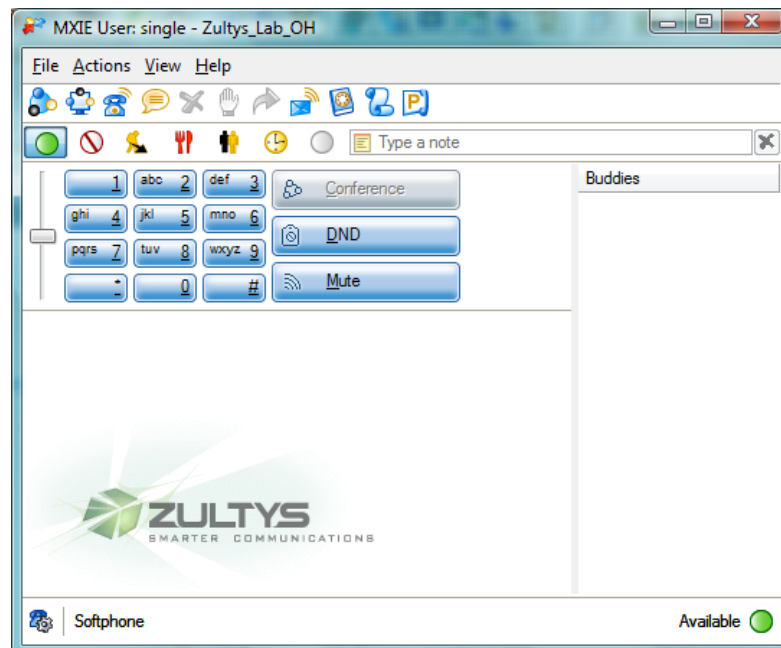
This option binds your MXIE instance to an MX registered contact. To bind MXIE to a registered contact:

12.5 Bind by a Call from the Device

This option binds your MXIE instance to an MX managed device that you designate by making a voice call. To bind MXIE to a device through a call:

12.6 Bind to Internal Softphone

This option binds your MXIE instance to the MXIE internal Softphone. You can bind only one instance to the Softphone. To bind MXIE to the Softphone, select this option and press the Next button.

**12.7 Bind Recent**

This option allows you to select from a menu of devices and registered contacts to which your MXIE was recently bound. This menu may include devices that are removed from the system or names that are no longer valid. To bind MXIE to a recently bound device:

12.8 Cancel a Bound Device


The following actions cancel a bound device:

- Select File | Cancel Bind from the main menu bar.

- Click on the binding status text on the left side of the Status Bar and select Cancel Bind from the drop down menu.
- Bind your MXIE instance to another device. This cancels the binding of the initial device.
- Physically remove the device from being registered with the MX.

13 Making and receiving calls

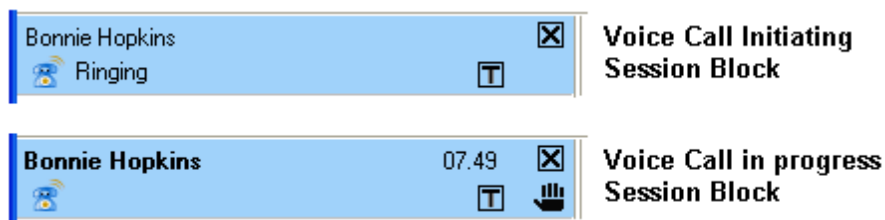
13.1 To place a voice call from a bound device through MXIE:

- **Main Menu:** select Actions | Voice Call, enter the contact information in the entry box, and press the Call button
- **Toolbar:** press the Voice Call icon , enter the contact information in the entry box, and press the Call button
- **Buddy List:** drag and drop a contact into the session list or the toolbar voice call icon
- **Address Book or Buddy List:** right click the mouse over a contact and select Make a Call
- **Address Book:** drag and drop a contact into the session list or the toolbar voice call icon
- **Call Log:** right click mouse over a record and select Call Back from the menu

13.2 To initiate a conference call from a bound device through MXIE:

- **Toolbar:** press the Conference icon 
- **Main Menu:** select Actions | Conference
- **Buddy List:** Drag a Buddy Group into the Session List or onto the Conference icon in the toolbar

After you initiate the call, the MXIE window displays a session block that represents the call. Below are session blocks at the various stages of a voice call: the top block was displayed after dialing the contact and before the call is answered; the bottom block was displayed during the phone conversation.



13.3 Receiving a Voice Call

You can receive a voice call through:

- a managed device bound to your MXIE instance

- a managed device assigned to your user account
- a registered contact

When a caller dials your contact information, all devices that fit these descriptions are alerted and MXIE displays a session block that lists the incoming contact information or the name of the caller.

13.4 To answer a call:

Take one of your ringing devices off hook; the remaining devices become inactive. The session block displays the name or number of the caller, the elapsed time, and (if enabled) session control buttons.

13.5 To reject a call:

- **Session List:** click the right mouse button over the ringing session block and select Disconnect
- **Keyboard:** type 'D' or 'd'

13.6 To send a call directly to voice mail:

- **Session List:** click the right mouse button over the ringing session block and select Send to Voice Mail
- **Session List:** if visible, press the disconnect button in the ringing session block
- **Keyboard:** type 'V' or 'v'

During the Call MXIE can perform control functions on calls that arrive on any device that you can access regardless of its binding status. You can perform the following operations during an active call.

13.7 Hold

After placing a call on hold, you must retrieve the call from the same phone to resume the conversation. You can also pick the call up from hold by dialing the extension number + * (Example: if the call is held on extension 5030 to pick it up dial 5030*).

To place a conversation on hold:

- **Session List:** press the Hold session control button
- **Session List:** right click the mouse over the session block and select Hold.
- **Toolbar:** press the Hold icon
- **Keyboard:** type 'H' or 'h'

13.7.1 Device Access Policy = Manage by MXIE

The phone is silent. Although the phone is off hook, it does not provide you with a dial tone nor automatically reserve a call appearance.

When using MXIE to place a call on hold, do not perform any operations from the phone before retrieving the call. Pressing phone buttons during this time (such as a new call appearance button) disconnects the first call. To retrieve a conversation that is on hold from MXIE:

- **Session List:** right click the mouse over the session block and select Retrieve
- **Session List:** if visible, press the retrieve session control button
- **Toolbar:** press the Hold icon
- **Keyboard:** type 'H' or 'h'

13.7.2 Device Access Policy = Manage by Device

The phone is silent. Although the phone is off hook, it does not provide you with a dial tone nor automatically reserve a call appearance.

You may press another call appearance to make a new call, without disconnecting the call on hold.

13.8Blind Transfer

When performing a Blind Transfer, you do not speak with the party to whom you are transferring the call.

13.9To perform a blind transfer:

- **Session List:** right-click while pointing in the session block
- **Session List:** drag and drop the session block to the address book or buddy list contact that is to receive the transferred call
- **Session List:** press the Transfer session control button
- **Keyboard:** type 'T' or 't'
- **Toolbar:** press the Transfer icon

13.10Attended Transfer

In an attended transfer, you speak to the party to whom you are transferring the call prior to the transfer.

13.11To perform an attended transfer:

13.11.1 Device Access Policy = Manage by MXIE

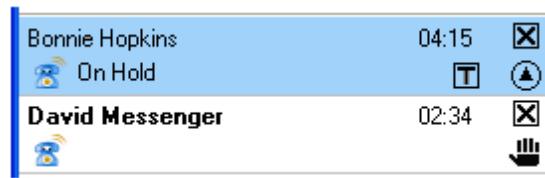
1. Call the first party.
2. Place the first party on hold by pressing the hold button on MXIE. Do Not Use controls on the phone to place the call on hold!
3. Call the second party.
4. To transfer the call:
 - **Session List:** right click mouse while pointing at the session block and select Transfer to <recipient's user name>
 - **Session List:** press the Transfer session control button

- **Session List:** drag and drop the session control block to the recipient's address book or buddy list contact

13.11.2 **Device Access Policy = Manage by Device**


1. Call the first party.
2. Place the first party on hold by pressing the hold button on MXIE or the Device.
3. Call the second party.
4. To transfer the call:
 - **Session List:** right click mouse while pointing at the session block and select Transfer to <recipient's user name>
 - **Session List:** press the Transfer session control button
 - **Session List:** drag and drop the session control block to the recipient's address book or buddy list contact

In figure below Bonnie Hopkins is on hold while David Messenger was called. Pressing the Transfer icon (T) transfers Bonnie Hopkins to David Messenger.






13.12Park

The Park function maintains the state of a call but suspends the conversation. To park a call:

- **Session List:** click the right mouse button over the session block and select Park
- **Session List:** drag and drop the session block into the Park Pickup icon  in the toolbar
- **Keyboard:** type 'P' or 'p'

When you park a call, the MX issues a two-digit call code and a multi-digit phone number for retrieving the call.

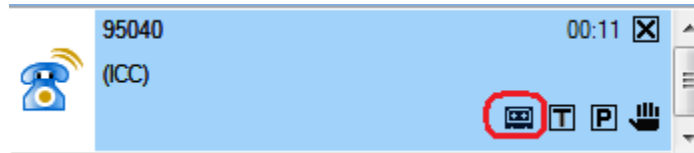
13.13To Pickup a Parked Call:

- **Toolbar:** press the Pickup icon , enter the two-digit call code in the entry box, then press the Pickup button 
- **Toolbar:** press the Voice Call icon . Enter the multi-digit phone number in the entry box and press the Call button

- **Main Menu:** select Actions | Voice Call, enter the multi-digit phone number in the entry box, and press the Call button


13.14 Call Recording

Call Recording is available to ICC agents or authorized users on a system with an active call recording license. MXIE roles that are permitted to record calls display a red recording icon on the right side of all voice call session blocks, as shown below.




To record a call, press the recording icon. While recording a call, the session block extends and displays recording control icon. A popup will state that your are recording, and the recording will be processed at the end of the call. If you do not want to see this message again, click on the "Do not show this message in the future".



To stop recording, press the recording button  in the recording block. If you resume recording after stopping, everything recorded prior to pressing the stop button is deleted.

14 Terminating the Connection


14.1 To terminate a voice call:

- **Session List:** click the right mouse button over the session block and select Disconnect
- **Session List:** press the Disconnect button in the session block
- **Toolbar:** press the Disconnect icon 
- **SIP Device:** place the device on hook

15 Call Handling Rules

Call handling rules manage incoming calls that you do not answer.

15.1 To view and edit your call handling rules:

- **Main Menu:** select File | Preferences | Call Handling
- **Status Bar:** press the Call Handling Rule Status icon 

16 Presence

Presence allows you to verify the availability of system users. The buddy list displays the presence of selected system users. The address book displays the presence icons for all system users.

16.1 Presence States

Each user is assigned a presence state based on online status and communication availability. Users logged into MXIE as an operator or an ACD agent are assigned an additional presence state for that role. Presence states are represented by icons. Select the icon style that MXIE uses to display your presence from the Toolbar Preferences panel.

16.1.1 User presence states include

- Available
- Not Available
- Busy
- At Lunch
- In a Meeting
- Be Right Back
- Appear Offline
- On the Phone

16.1.2 Operator presence states include

- Available
- Not Available
- On the Phone
- Logged Off

16.1.3 ACD and hunt group agent presence states include

- Available
- Not Available
- Active, Wrap Up
- Logged Off

16.2 Presence Rules

Presence rules define the automatic transitions between presence states.

16.3 Users

These conditions trigger transitions between user presence states:

- **Available to Not Available** triggers if the user's computer is inactive for a period specified in the Presence Preferences panel.
- **Available to On the Phone** triggers when the user makes or receives a voice call.
- **On the Phone to Busy (wrap up time)** triggers when the user terminates a call if the Busy state was entered from the On the Phone state because of that call.
- **Wrap up to Available** triggers after remaining in the Busy (wrap up time) condition for a specified period.
- **Available to Busy** the user has a role as an operator or an agent and is busy within that role.

16.4 Operators

These conditions trigger transitions between operator presence states:

- **Available to On the Phone** triggers when an ACD agent or operator initiates or accepts a call. This rule cannot be removed or changed.
- **On the Phone to Available** triggers when an operator terminates a call.
- **Available to Not Available** triggers when the user changes to a state specified by the ACD and Operator User Preferences window.

16.5 ACD and Hunt Group Agents

These conditions trigger transitions between agent presence states:

- **Available to Active** triggers when an ACD agent initiates or accepts a call. This rule cannot be removed or changed.
- **Active to Wrap up** triggers when an agent terminates a call.
- **Wrap up to Available** triggers after remaining in the wrap up state for a period specified by the ACD and Operator User Preferences window.
- **Available to Not Available** triggers when the user changes to a state specified by the ACD and Operator User Preferences window.

16.6 Manual State Transitions

To manually change your presence state:

- **Presence bar:** Press a presence state icon.
- **Status bar:** Press the Presence Status text to access a menu that lists the available states. When MXIE displays an operator or agent role, this menu provides a global option that sets the presence state for all roles.

Manually entering any state except Available disables any presence transition rule that defines an automatic method of leaving the state.

17 Voice Mail

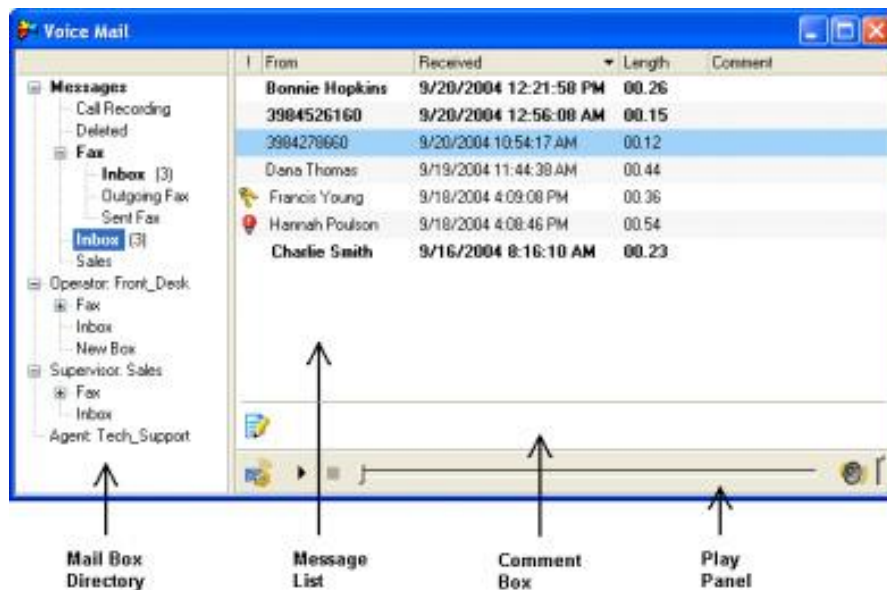
This window displays, organizes, and manages your voice messages and faxes.

To access the Voice Mail window from the MXIE user window:

- **Toolbar:** Press the Voice Mail  icon.
- **Main Menu:** Select View | Voice Mail.
- **Session List:** if visible, click the You have new voice messages text.

17.1 Mail Box Directory

The Mail box directory is located on the left side of the window. Mail folders store voice mail messages. Mail box service options create, copy, move, delete, or compact the voice mail folders. System folders (Inbox or Deleted) cannot be moved or deleted.



To access mail box services, right click the mouse over the mail box directory.

17.2 Message List

The right side of the Voice Mail window displays all voice messages and faxes stored in the mail box selected in the Mail Box Directory panel.

Message service options allow you to listen to, reply to, and forward your messages and perform message management tasks.

New messages are displayed in bold typeface; saved messages are displayed in regular typeface.

- To access message services, right click the mouse button while pointing in the Message List.
- To alter the saved status of a message, select the message and access message services: Press Save to change an unread message to a saved message. Press Mark as Unread to return a message to new status.
- To move a message into a mail box, Drag and drop a message from the message list or a mail box into the desired mail box.
- To copy a message into another mail box, Press the Shift key while moving a message into the desired mail box.
- To forward a voice message to another user, right click on a message title and select Forward or drag and drop a voice message title line into an address book entry or buddy list contact.
- To reply to a voice message from another system user, right click on a message and select Reply.
- To save a comment with the highlighted message, click in the comment box to the right of the folder & pencil icon, then type a text message.
- To listen to a voice message or display a fax, double click on the desired message or select the message and press the play button in the play panel.
- To send a voice message, click the right mouse button while pointing the recipient and select Send a Voice Mail.
- To send a fax, click the right mouse button while pointing the recipient and select Send a fax.

17.3 Voice Mail Settings

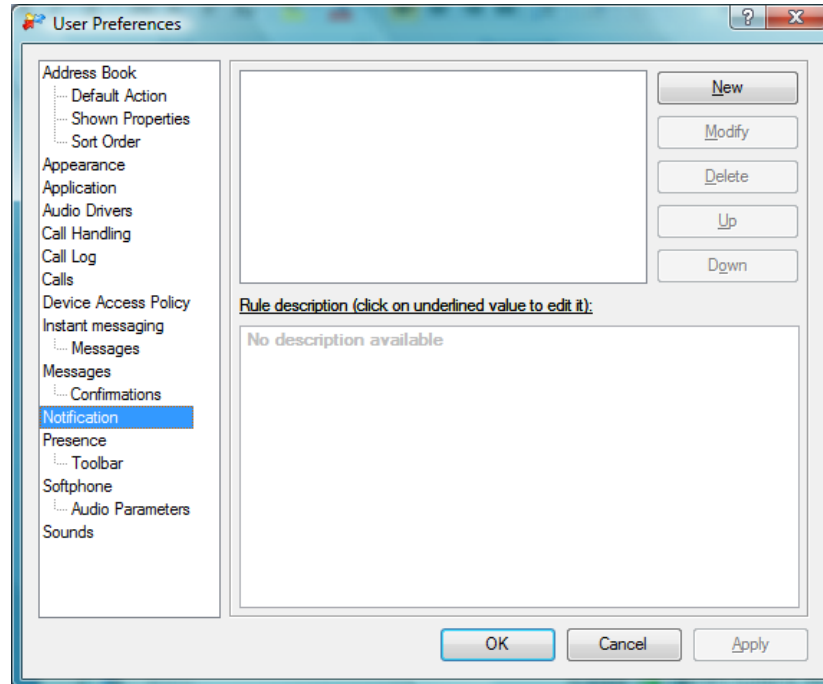
The Voice Mail Settings panel changes your active greeting and displays your voice mail storage capacity.

To access the Voice Mail Settings panel, press the icon on the left side of the play panel.

17.4 Message Notification

The MX can send an email to notify you of any incoming voice messages and faxes. Notification rules determine how you are notified of incoming messages.

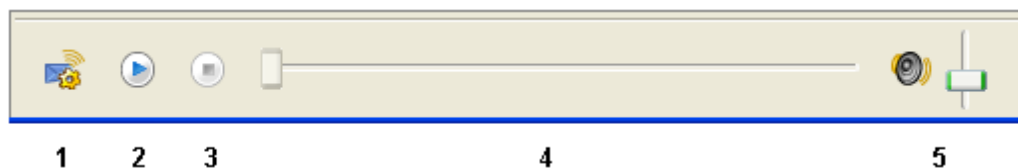
To view and edit your notification rules: select File | Preferences | Notification.



18 Playing Voicemails and Call Recordings

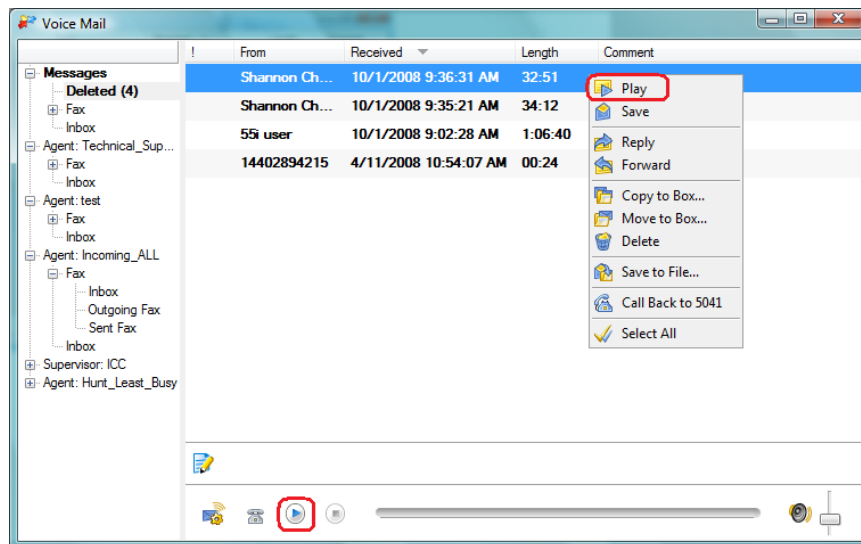
The Play panel, shown in figure below, is located at the bottom of the Message list and controls the audio playback of the selected Voice Message or On Demand Call Recordings. Play panel buttons include:

1. **Voice Mail Settings:** Opens the Voice Mail Settings window.
2. **Play / Pause:** Begins playback of the selected voice mail message. When MXIE is playing a message, this area displays the Pause button. Pressing the pause button temporarily stops playback of the selected message. To resume playback, press the pause button again.
3. **Stop:** Stops playback of the audio message and resets the playback pointer to the beginning of the message.
4. **Progress bar:** Displays the message playback progress. The vertical bar moves across the horizontal track during playback. You can move the bar with the mouse to replay or skip portions of the message.
5. **Volume:** Adjusts the volume of the message playback.



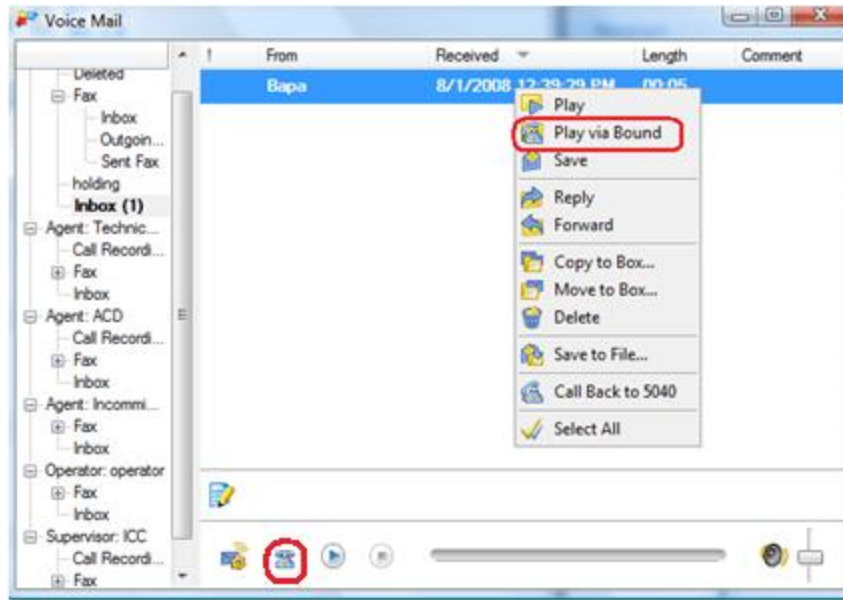
18.1 Playing via the computer

Users may select to playback Voice Mail messages and Call Recordings using the computers speakers.



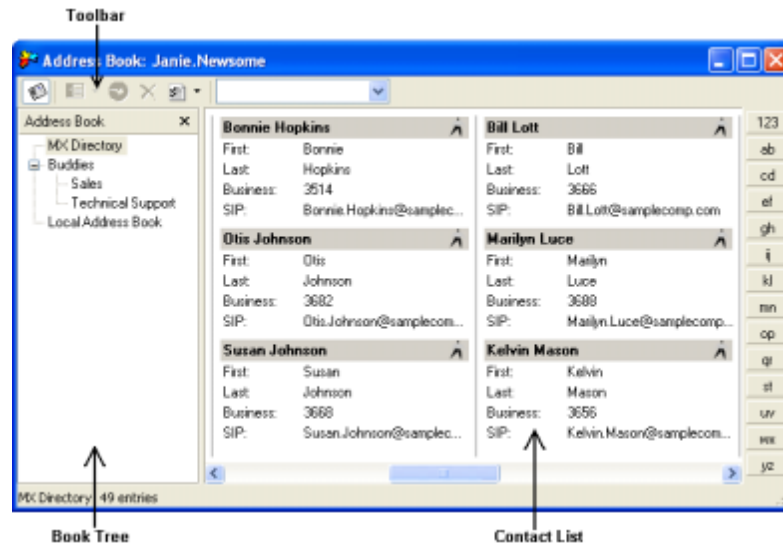
18.2 Playing via bound device

Users may select to playback Voice Mail messages and Call Recordings using the device / phone currently bound to MXIE as the audio device. This feature provides improved privacy as users no longer need to play audio through the computer speakers and also enhances functionality in Thin Client environments (EG: Terminal Services / Citrix) where client machines often have inadequate performance to support audio playback or have no speakers. New MXIE preference option is available to force all playback via the bound phone for situations where the user's computer does not have speakers.



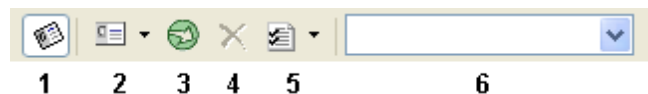
19 Address Book

The Address Book window, shown below, accesses the MX user directory and supports the creation of personal address books.



19.1 Toolbar

The following is a description of the Toolbar buttons:



1. **Show/Hide Book Tree:** Toggles the Book Tree display status.
2. **New Entry:** Adds an entry to the contact list. Press the arrow to add a New Address Book to the Book Tree.
3. **Import Book:** Imports data file contents into the current address book.
4. **Delete:** Removes the selected entity – either a book from the book tree or an entry from the contact list.
5. **Options:** Accesses the Address Book Settings window Press the arrow to sort the Address Book contacts.
6. **Search box:** Finds users in the contact list.

19.2 Book Tree

The book tree displays your address books. The contact list displays the content of the book highlighted in this panel. The book tree always displays the MX Directory

(derived from the MX user list) and the Local Address Book; you cannot edit, move, or delete these books.

- The Show/Hide Book Tree button is depressed when the book tree is displayed and is not depressed when the book tree is hidden.
- To change the display status of the Book Tree, press the Show/Hide Book

19.3Tree button.

- To add new books to the book tree, press the New Entry arrow.
- To delete books from the book tree, press the Delete button.

After creating new address books, you can move them within the book tree by using drag and drop operations.

19.4Contact List

This list displays the contact names and information stored in the current address book, as designated by the book tree.

19.5Editing the Contact List

- To edit an entry, double-click the contact to access the Entry Information dialog panel.
- To delete an entry, select the entry and press the Delete button.
- To add an entry, press the New Entry button on the address book toolbar.
- To import data file contents into an address book, press the Import Book button in the address book toolbar.
- Search for a contact: Type the first or last name of the contact in the search box and press the enter key. Search box contents are case sensitive.
- Press the enter key again to resume the search.
- Select the data fields displayed for each entry: Access the Shown Entry Properties panel of the Address Book Settings window by pressing the Options button in the toolbar.

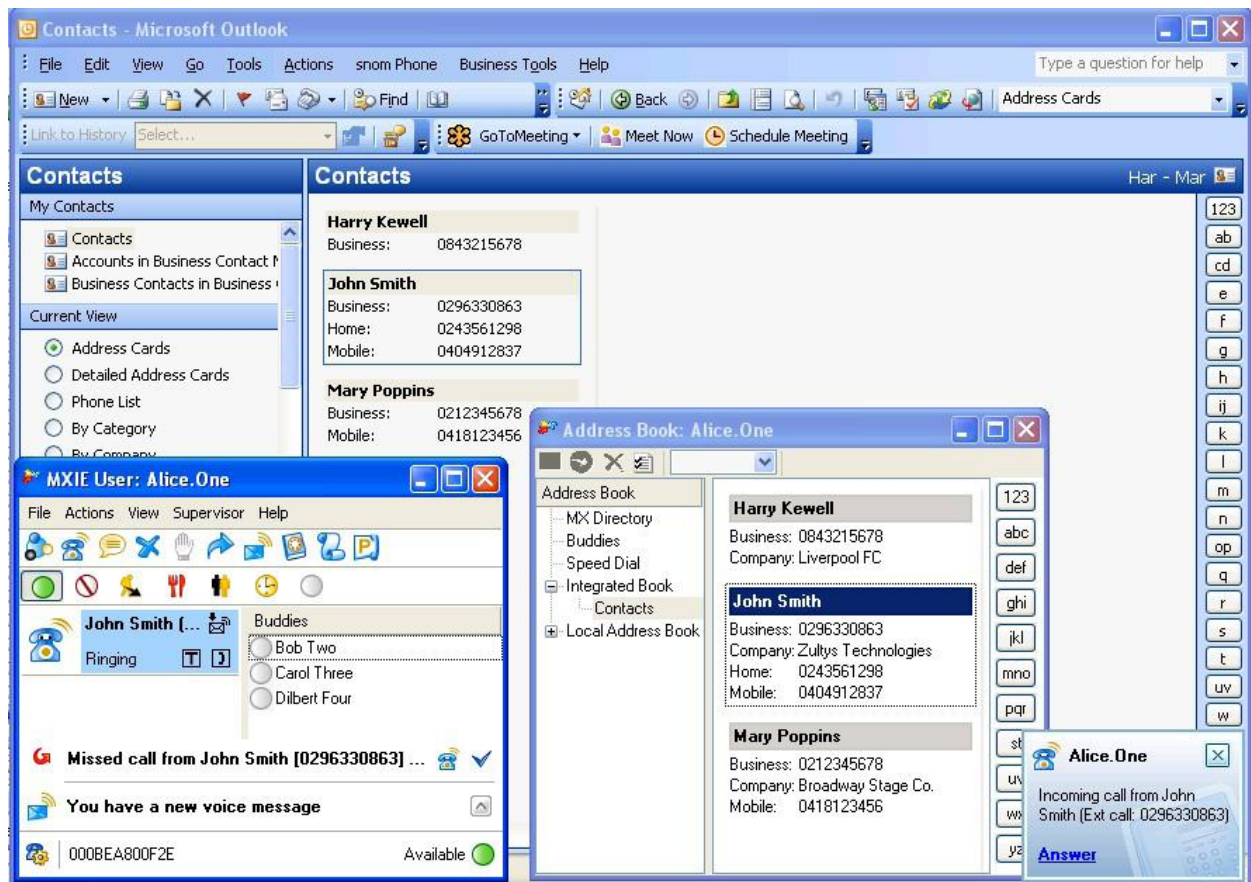
19.6Outlook Integration

Microsoft Outlook Contact records are now available in MXIE address book. New address book 'MS Outlook' is displayed on the top level of MXIE Address Book window. All Contact information (contact name, company name, business, mobile, and home phone numbers) is available for placing and receiving calls from within MXIE. The Caller ID number of incoming calls is checked against Outlook contacts with a match resulting in screen pop showing customer name, phone number and company name.

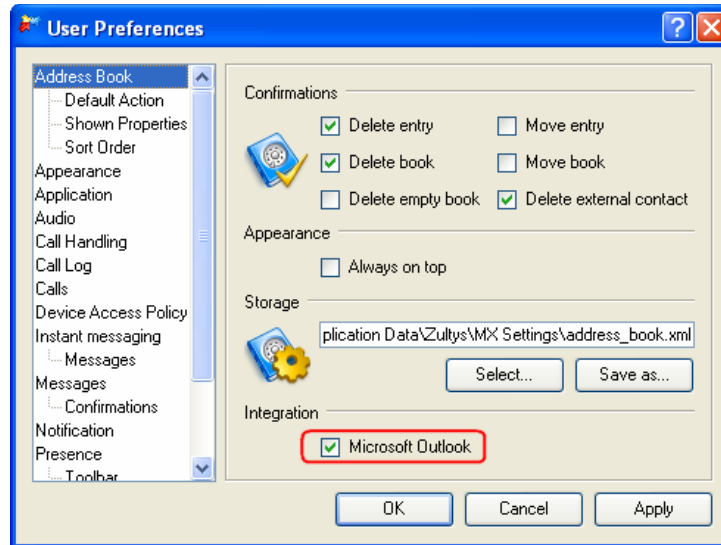
The following features are provided by MXIE Outlook Address Book Integration:

- All contact folders visible in MS Outlook appear in the MXIE address book

- Updates to existing contact records in MS Outlook are immediately reflected in MXIE
- MXIE Screen pops display contact information based on Caller ID match to Outlook contact
- Initiate and transfer calls to Outlook Contacts directly from MXIE
- Call Log history displays Outlook Contact names based on Caller ID

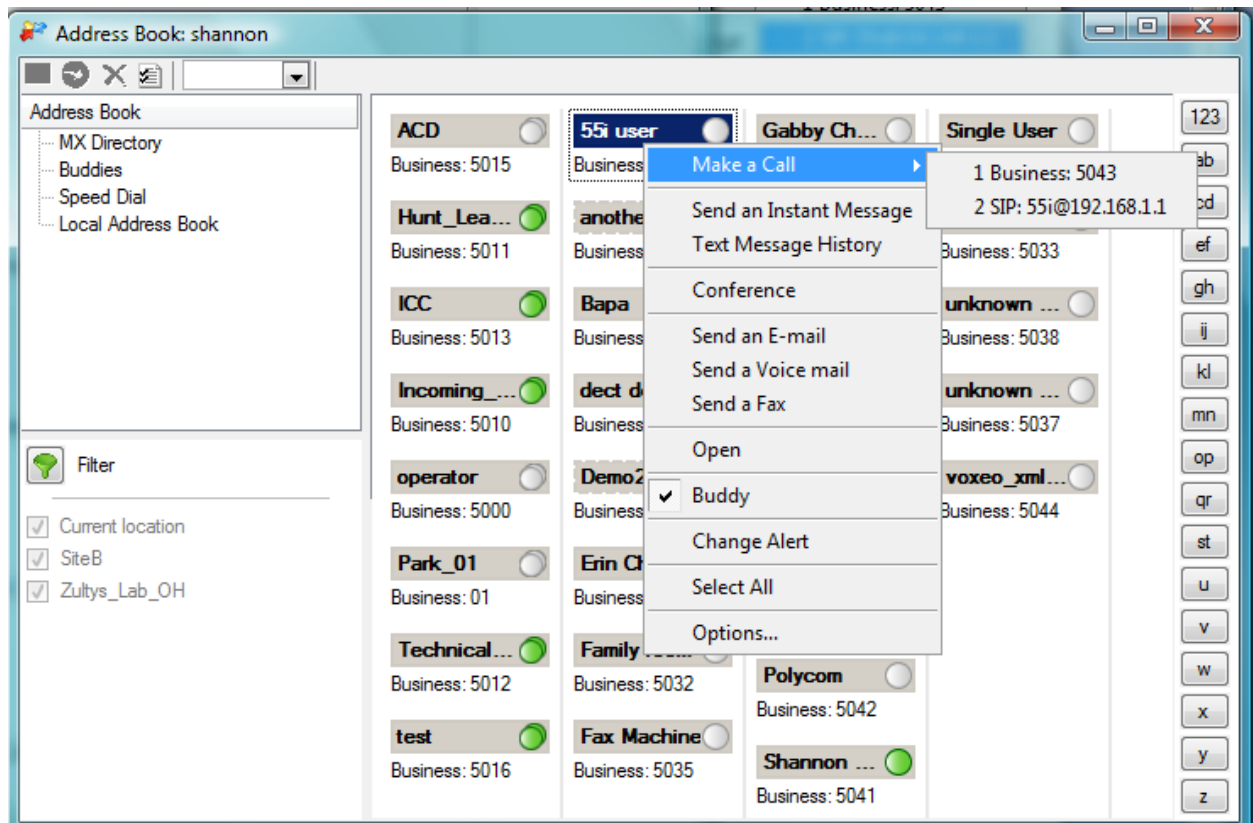


To integrate your MXIE with Outlook® go to File | Preferences | Address Book, select Microsoft® Outlook® from the integration options.



20MXIE Operations

To perform MXIE operations from the Contact List, access an operations panel by right clicking the mouse while pointing at a contact.




20.1 Functions

- **Make a call:** Place a phone call to this user
- **Send a text message:** Send a text message to this user
- **Text message history:** View any text message history for this user. Text messages are stored locally on the PC they were sent from, and are stored per the storage length set in the MXIE's options.
- **Conference:** Start a conference call
- **Send an E-mail:** Send this user an email. The email fields must be populated to use this function.
- **Send a Voice mail:** Send this user a voicemail. The PC must have speakers and a microphone to use this function.
- **Send a Fax:** Send this user a fax. The fax driver must be load and a valid fax license available to use this function.
- **Open:** Open this contact to modify locally
- **Buddy:** Convert this user to a buddy, or remove them from the buddy list.
- **Change Alert:** Add, or remove an alert from this user. An alert is a notification that a users state has changed. It may be a popup window or audio.
- **Select All:** Select all users
- **Options...:** Shortcut to MXIE's options

21 MXmeeting Integration

Used to start an MXmeeting from MXIE. MXmeeting software must be installed prior to using, and an MXmeeting appliance must be installed and configured.

- **Toolbar:** press the MXmeeting icon  , the MXmeeting application will launch. MXmeeting is a separate application and must be installed prior to using it.
- **Main Menu:** select Actions | Web Conference, the MXmeeting application will launch. MXmeeting is a separate application and must be installed prior to using it.

