

# TOSHIBA



**STRATA**

Communication Server Release 7

**CS**

**Quick Reference Guide**

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**Toshiba America Information Systems, Inc.  
Telecommunication Systems Division**

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# Quick Reference

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

<b>My Extension</b>	
<b>My Password</b>	
<b>My Direct Dial Number</b>	
<b>ViewPoint Web Access URL</b>	

## Special Access Codes

<b>Access Code</b>	<b>Strata CS Feature</b>	<b>Default</b>
	Access dial-by-name directory	411, *93
	Log into account from internal dial tone	#
	Log into account from auto attendant	#
	Company Operator Extension	0
	Emergency	911

<b>Access Code</b>	<b>Dialing Service</b>	<b>Default</b>
	Dial an outside line	9

# Welcome to Strata CS

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

## Related Documents/Media

The following companion documentation is available:

- Strata CS Client User Guide
- Strata CS Quick Reference Card
- Strata CS Digital Telephone User Guide
- Strata CS-UIP 300 IP Telephone Administrator Guide
- Strata CS-UIP 300 IP Telephone User Guide
- Strata CS-UIP 300 IP Telephone Quick Reference Guide
- Strata CS Analog Telephone User Guide
- Strata CS Library CD-ROM
- Online Help. In any dialog box in ViewPoint, click Help or press F1 for an explanation of that dialog box. You can also access Help using the Help menu.

## Access Strata CS

You can access Strata CS in the following ways:

- Phone. To use most of Strata CS's features, the phone is all you need. Verbal menus guide you through handling calls and customizing your account.
- Strata CS ViewPoint application. ViewPoint enables you to use the full power of the Strata CS system. If you have ViewPoint installed, you can run it by choosing Start > Programs > Toshiba > Strata CS > Strata CS ViewPoint.
- Strata CS ViewPoint Web Access. You can access a version of ViewPoint using a Web browser. Ask your Strata CS system administrator for the ViewPoint Web address, if it has been installed.

# Setup for New Users

If you are a new user, you should perform the following tasks in your account prior to using Strata CS:

## Record a Voice Title

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

1. Pick up the phone and press #.
2. Follow the prompts to log in, and then press 621 to record your name.
3. Press # immediately after saying your name to end recording.

## Record a Voice Mail Greeting

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

1. Pick up the phone and press #.
2. Follow the prompts to log in, and then press 44 to record the greeting.
3. Press # to end recording.

## Change Your Password

Your Strata CS System Administrator gave you your initial password. You should enter a new password that will be more secure.

1. Pick up the phone and press #.
2. Follow the prompts to log in, and then press 63 to change your password.

You should choose a secure password. A secure password has at least five digits and contains neither your extension number nor repeating digits (111), nor sequential digits (123). Your system may enforce some of these guidelines as requirements.

# Placing Calls

Strata CS enables you to place calls either manually using the phone or visually using ViewPoint.

## Using the Phone

- To call another extension pick up the handset and dial the extension.
  - To call an external number dial an access code (usually 9) and the number. Your Strata CS system administrator can tell you the access codes to dial for various types of external calls.
  - To call direct to voice mail, dial the extension followed by \*. (May not be enabled for your system.)
- **To call while on another call**
1. Press Flash #. Your caller is put on hold.
  2. Dial the number.
  3. To switch between calls, press Flash.

## Using ViewPoint

- **To call another extension**
1. Choose File > New > Call.
  2. In the Place Call To dialog box, click Extensions and then click the extension you want to call.
  3. Click OK.
- **To call an external number**
1. Choose File > New > Call.
  2. From the Call Using drop-down list, select the access code and dialing service to use.
  3. In Name/Number, enter the number to dial. Then click OK to place the call.

## Quick Ways to Place Calls with ViewPoint

You can also use the *Dial* field on the toolbar to place a call. Type an extension or phone number and press **Enter**. You can also type the name of a user or contact or drag-and-drop text into it.

You can also right-click an extension or contact in the Phonebook pane of the Call Monitor folder and choose Speed Dial or Place Call.

# Answering Calls

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

## Using the Phone

- To answer your phone pick up the handset.
- **To answer another ringing phone**

1. Pick up your handset.
2. Press \* 91 #. If more than one phone is ringing, enter the extension that you want to answer before pressing #.

## Call From Prompt

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

1. Press 1. Accept the call.
2. Press 2 or hang up. Send the call to voice mail. (Hanging up sends them to your next routing list action; pressing 2 sends them to the final action.)
3. Press 3. Send the call to voice mail and monitor the message as it is being left. (To pick up, press Flash 1.)

## Turning Off Call From Prompt

1. In ViewPoint, choose Tools > Options.
2. Click the Phone > Call Announcing tab.
3. Uncheck Internal, External, and External Direct. Click OK.

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

## Using ViewPoint

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



# Transferring Calls

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

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

## Using the Phone

### ► To perform a blind transfer

1. Press Flash 1.
2. Enter the extension or external number (incl. access code).
3. Hang up to complete the transfer.

### ► To perform a supervised transfer

1. Press Flash 1.
2. Enter the extension. You are connected to the recipient, and the caller is put on hold.
3. To complete the transfer, hang up

...or

To cancel the transfer, press Flash 1. You are reconnected with the caller. If you have turned on direct transfer, use just Flash.

## Using ViewPoint

### ► To perform a transfer

1. In the Call Monitor view, click the call that you want to transfer.
2. Choose Actions > Transfer.
3. Select the recipient (if it is an extension or contact) or enter the phone number.
4. To perform a blind transfer, click Blind > OK

...or

To perform a supervised transfer, click Supervised > OK.

5. To complete the transfer, click Complete

...or

To cancel the transfer and return to the caller, click Cancel.

## Drag-and-drop Transfers

With the Phone pane turned on in the Call Monitor view (View > Phonebook Pane), you can blind-transfer a call by dragging it from the Call Monitor to the extension. **CTRL**-drag to do a supervised transfer. **ALT**-drag to transfer directly to the extension's voice mail. **SHIFT**-drag to open the Transfer To dialog box.

# Call Handling

See the *Strata CS Client User Guide* for many more call handling options.

## Placing a Call On Hold

### Using the Phone

- To place a call on hold press Flash. To return to the caller, press Flash again.
- To place a caller on hold without hearing the telephone command prompts, press Flash 7.

### Using ViewPoint

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

## Creating Conference Call

### Using the Phone

1. Place the first call.
2. Press Flash # to put the call on hold and place the second call.
3. Repeat for subsequent calls.
4. When you have placed all calls, press Flash 5 to conference them together.

### Using ViewPoint

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

You can also create a conference with drag-and-drop by dragging an extension from the Phonebook pane to a call in the Call Monitor. The extension is added to the call.

# Voice Messages

Managing voice mail is easy using the phone or Client.

## Using the Phone

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

Enter multiple extensions like this: ext1 # ext2 # ext3 # #

## Using ViewPoint

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

- To save a message drag the message to the Saved folder or to another folder of your own creation.
- To create a new folder right-click Inbox in the Folder List and choose New Folder.
- To delete a message click the message and press **Delete**. The message moves to the Deleted folder.
- To delete the message permanently empty the Deleted folder by choosing Tools > Empty Deleted Folder.
- To view the Folder List choose All Folders in the Navigation pane.

# Greetings


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



## Using the Phone

- To log in at your phone press # <password> #.
- To log in at another phone press # <your extension> # <password> #.
- To hear your greeting log in and press 41.
- To record a new greeting log in and press 46.
- **To change the active greeting**
  1. Log in and press 4.
  2. After a greeting plays, press 2 to advance to the next greeting.
  3. When you reach the greeting you want to make active, press 3.

## Using ViewPoint

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

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

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

# Personal Status

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

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

## Changing Your Personal Status

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

### ➤ To change your personal status

- In ViewPoint, click  Available ▾ and choose another personal status

...or

Using the phone, log in and press 61.

## Predefined Statuses

The following statuses are predefined in Strata CS:

- Available. Indicates that you are at your desk and ready to receive calls.
- Do Not Disturb. Sends your incoming calls directly to voice mail without ringing your phone.
- In a Meeting / Out of the Office / On Vacation. Same as DND, and tells people where you are.
- Agent Status (for Call Center Agents only). Indicates whether they are taking queue calls.

- To edit a personal status, double-click it in the ViewPoint's Personal Statuses view.

## Custom Personal Statuses

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

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

# Forwarding Calls

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


## Using the Phone

- To log in at your phone press # <password> #.
- To log in at another phone press # <your extension> # <password> #.
- To forward your calls to another extension log in and press 52. Enter the extension.
- From another extension log in and press 51.
- **To forward your calls to an external number**
  1. Log in and press 53.
  2. Enter the phone number as you would dial it, including the access code (usually 9).

**Note** From an external phone that supplies Caller ID, you can call your office, log in, and press 51.

- To turn off call forwarding log in and press 54.

## Using ViewPoint

- **To forward your calls to another extension**
  1. Choose Tools > Call Forwarding. Check Forward Calls.
  2. Enter the extension under Name/Extension. Click OK.
- **To forward your calls to an external number**
  1. Choose Tools > Call Forwarding. Check Forward calls.
  2. From the Call Using drop-down list, select the access code to use (usually 9).
  3. Click OK.
- **To forward your calls from a remote location**
  - Log into ViewPoint using the Remote Number option, then check Forward my calls... at the next dialog box.
- **To turn off call forwarding**
  1. Choose Tools > Call Forwarding or click  on the status bar.
  2. Uncheck Forward calls.

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

# Contacts

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

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

## Entering Contact

1. In ViewPoint, click File > New > Contact.
2. In the Contact dialog box, enter the contact's information (click Help for assistance) and click OK.

## Contact Voice Titles

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

## Placing Call to a Contact

### Using ViewPoint

1. Type a portion of the contact's name in the toolbar *Dial* field in ViewPoint.
2. Press **Enter** to place the call.

...or

1. Right-click a Contact in the Contacts folder or Phonebook pane.
2. Choose **Speed Dial** or **Place Call**. With **Place Call** you can select the number to dial.

...or

1. Choose File > New > Call from any folder.
2. Click **Contacts**.
3. Select the contact and click **OK**.

# Caller Recognition

Strata CS recognizes contacts when they call by their Caller ID numbers (or PIN numbers – see below). Each contact has a list of phone numbers that Strata CS uses to identify that contact.

- To view the list double-click the contact in the Contacts view and click the Caller Identification tab.

## Adding a Phone Number for Contact Recognition

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

- Enter the phone number as one of the contact's phone numbers and check "Use phone number as caller identification for this contact."

...or

1. When the contact calls, associate the Caller ID number of the call with the contact.
2. Select either the active call in the Call Monitor, the record of the call in the Call Log, or the voice message from a Voice Mail folder.
3. Choose Actions > Associate.
4. In the Associate dialog box, select the contact. Select whether to use the Caller ID name or number for contact recognition.
5. Click OK.

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

## Contact PINs

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

- **To assign a contact PIN to a contact**

1. Right-click the contact.
2. Select Open.
3. Click the Caller Identification tab and enter the PIN number.



# Routing Lists

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

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

An easy way to switch between routing lists is to create custom personal statuses that use the different routing lists, and switch between those.


## Example Routing Lists

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

## Creating Routing List

- In ViewPoint, click File > New > Routing List.

## Changing Active Routing List

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

# Call Rules

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

## Creating Call Rule

- In ViewPoint, choose File > New > Call Rule.

## Ways to Distinguish Incoming Calls

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

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

## Ways to Change How Call Is Handled

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

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

# Handsfree and Voice-first Answering

Hands-free and voice-first answering are special modes that make answering the phone easier for high-volume or headset phone users.

## Using Handsfree answering

Handsfree answering is primarily an aid for headset and speakerphone users. It enables you to answer calls without picking up and holding a receiver.

### Turning Handsfree Answering On and Off

1. Choose Tools > Options and click the Phone tab.
  2. Check or uncheck Enable handsfree answering.  
...or
- Pick up the telephone and press \* 10 to toggle the handsfree answering feature on and off.

## Placing/Answering Calls with Handsfree Answering

With handsfree answering, the phone is considered to be off-hook, but you do not hear a dial tone.

- To place a call press Flash to get a dial tone. Incoming calls do not ring your phone, but are signaled by a beep.

You do not need to pick up the handset to answer an incoming call. After you hear the beep, you are connected with the caller and can start talking (unless you have announce caller on).

## Using Voice-first Answering

Voice-first answering enables you to treat your incoming internal calls as intercom calls. When an internal call arrives, your phone does not ring. Instead, a beep plays, and a two-way audio connection is established over your speakerphone. You can speak without lifting the receiver. (External calls ring your phone as usual.)

You must have a Toshiba, Cybiolink, or Aastra phone to use voice-first answering.

### Turning Voice-first Answering On and Off

1. Choose Tools > Options.
2. On the General tab, check or uncheck Enable voice-first answering.

# Intercom and Paging

Users do not receive an intercom call or page under the following circumstances:

- If they are using the phone; for example, if they are in a call.
- If they have the Do Not Disturb personal status selected.

If you have permission, you can dial \*15 plus an extension to place an intercom call or page as follows:

## Making an Intercom Call

- Dial \*15 plus a user's extension. Places an intercom call, a two-way audio connection with the user's speakerphone. You can speak with the user without the user needing to pick up the phone.

## Paging

- Dial \*15 plus a workgroup's extension. Places a page, a one-way audio connection to all users within the workgroup. When you speak, your voice is heard over the workgroup's speakerphones.

You might experience a delay before the page is connected, depending on the size of the workgroup being paged. When you hear the beep, you may begin speaking.

**Note** By default, you have 30 seconds after hearing the beep to speak, before the page ends automatically. Your system administrator may have changed that time limit.

## Who Can Receive Intercom Calls and Pages

In order to receive an intercom call or page, you must have a Cybiolink, Aastra, or Toshiba Strata phone, with that phone type selected in ViewPoint under Tools > Options on the Phone tab, or a regular analog phone with hands-free mode enabled.

# Call Center Agents

If you are a Call Center Agent, this page provides the commands you need to know.

## Working In Call Center Queue

The following functions can be done in either ViewPoint or by telephone.

### Start of Workday

Select one of the following personal status commands:

- Dial \*50 (Available) to receive queue and non-queue calls.

...or

- \*51 (Available Queue Only) to receive only queue calls.

Non-queue calls are sent to voice mail.

### Breaks

1. Dial \*53 (On Break).
2. When your break is over, dial \*50 or \*51.

### End of Workday

- Dial \*52 (Available Non-Queue).

### Signing In/Out of Queues

- Using ViewPoint, select Tools > Queue Sign In/Out.

**Note** When you are signed out of a queue, you do not receive calls from it.

### Working In ACD Workgroup

#### ➤ To begin taking ACD Workgroup calls

1. Using ViewPoint, select Tools > Options > Incoming Calls tab.
2. Check “Accept ACD Workgroup calls.”
3. Click OK.

#### ➤ To stop taking calls

- Uncheck “Accept ACD Workgroup calls” field.

### Using Call Monitor

#### ➤ To monitor and control call center calls visually

- Use the appropriate tab of ViewPoint’s Call Monitor. You will see a separate tab for each queue or ACD Workgroup in which you are an agent.

# Remote Use of Strata CS

You can access most Strata CS features from a remote telephone. You can use the telephone commands from your home or cell telephone just as if from your office phone.

**Note** When using telephone commands from a remote phone, you must press \*\* instead of Flash.

## Log In from Remote Telephone

1. Call your office.
2. At system prompt, press # <your extension> # <your password> #. You can now listen to your voice messages, manage your greetings, or forward your calls, etc.

## Log Out of Remote Access

- Before hanging up, press \*96. This logs you off the system and clears your telephone line so that you can immediately make other calls.

## Place Calls Through Strata CS

1. Log in.
2. Press # for a dial tone, and dial the number including the access code.

**Note** # gives you an internal Strata CS dial tone, so you can dial Strata CS extensions or use the telephone commands.

3. Press 3 to end the call and remain logged in to Strata CS. This returns you to the voice mail/account menu.

...or

press \*96 and hang up to log off of the system and clear your phone.



















## Using ViewPoint with a Remote Telephone

You can use ViewPoint or ViewPoint Web Access to place, answer, and handle calls with your remote cell or home telephone. Note, that when you place a call from ViewPoint, Strata CS calls you, saving you the charge.

1. Click Options > Remote Number.
2. Enter the telephone number of the remote telephone. Click OK.
3. On the next screen, click “Forward my calls to this number.” This gives you ViewPoint control on your incoming Strata CS calls.

# ViewPoint Folders

Use the Navigation pane on the left side of the ViewPoint window to choose folders. Folders appear in the Favorite Folders list when you click the Navigation pane icon shown.

Navigation pane	Folder	Description
		<b>Call Monitor</b> Place calls and handle incoming calls (transfer calls, create conference calls, monitor voice mail).
		<b>Voice Mail \ Inbox</b> Hear and manage your voice messages. To call back a message, right-click it and choose Place Call.
		<b>Contacts</b> Manage an online phone book of your telephone contacts.
		<b>Call Log</b> View a record of all your phone calls. To return the call, right-click it and choose Place Call.
		<b>Call Monitor \ Extensions</b> View all TeleVantage extensions, their personal statuses, and who is on the phone now.
		<b>Call Monitor \ Queue Monitor</b> Call Center agents only. View and manage agents, and view real-time queue statistics.
		<b>Configuration \ Call Rules</b> Set up custom call handling for individual callers or for specific dates or times.
		<b>Configuration \ Greetings</b> Record your voice-mail greetings and change the active greeting.
		<b>Configuration \ Personal Statuses</b> Manage personal statuses that communicate your location and availability to your coworkers and control how your incoming calls are handled.
		<b>Configuration \ Routing Lists</b> Set up "follow me" call forwarding (calls ring a series of numbers to find you), and direct calls to workgroups or other extensions.
		<b>Configuration \ Workgroups</b> Define groups of users and contacts. You can then send voice messages to the group, call all group phones, share your ViewPoint folders with the group, and more.

# NOTES

- Direct transfer is a special mode for users who only answer and transfer calls. In direct transfer mode you can transfer a call simply by pressing **Flash**. The other telephone commands on the call handling menu are not available to you. To change your transfer mode, talk to your system administrator.
  - If you frequently work from the same remote telephone, your system administrator can define the telephone as an external station. If your remote telephone is an external station, do not forward your calls—they will come to you automatically.
- **To use ViewPoint at your remote telephone**
- Log on using your external Station ID.
- **To change the number that your external station calls (e.g., from home to cell)**
- Click Tools > Options > Phone\Station Features tab.













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# TOSHIBA



**STRATA**

Communication Server Release 7

**CS**

**Quick Reference Guide**

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# Quick Reference

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

<b>My Extension</b>	
<b>My Password</b>	
<b>My Direct Dial Number</b>	
<b>ViewPoint Web Access URL</b>	

## Special Access Codes

<b>Access Code</b>	<b>Strata CS Feature</b>	<b>Default</b>
	Access dial-by-name directory	411, *93
	Log into account from internal dial tone	#
	Log into account from auto attendant	#
	Company Operator Extension	0
	Emergency	911

<b>Access Code</b>	<b>Dialing Service</b>	<b>Default</b>
	Dial an outside line	9

# Welcome to Strata CS

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

## Related Documents/Media

The following companion documentation is available:

- Strata CS Client User Guide
- Strata CS Quick Reference Card
- Strata CS Digital Telephone User Guide
- Strata CS-UIP 300 IP Telephone Administrator Guide
- Strata CS-UIP 300 IP Telephone User Guide
- Strata CS-UIP 300 IP Telephone Quick Reference Guide
- Strata CS Analog Telephone User Guide
- Strata CS Library CD-ROM
- Online Help. In any dialog box in ViewPoint, click Help or press F1 for an explanation of that dialog box. You can also access Help using the Help menu.

## Access Strata CS

You can access Strata CS in the following ways:

- Phone. To use most of Strata CS's features, the phone is all you need. Verbal menus guide you through handling calls and customizing your account.
- Strata CS ViewPoint application. ViewPoint enables you to use the full power of the Strata CS system. If you have ViewPoint installed, you can run it by choosing Start > Programs > Toshiba > Strata CS > Strata CS ViewPoint.
- Strata CS ViewPoint Web Access. You can access a version of ViewPoint using a Web browser. Ask your Strata CS system administrator for the ViewPoint Web address, if it has been installed.

# Setup for New Users

If you are a new user, you should perform the following tasks in your account prior to using Strata CS:

## Record a Voice Title

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

1. Pick up the phone and press #.
2. Follow the prompts to log in, and then press 621 to record your name.
3. Press # immediately after saying your name to end recording.

## Record a Voice Mail Greeting

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

1. Pick up the phone and press #.
2. Follow the prompts to log in, and then press 44 to record the greeting.
3. Press # to end recording.

## Change Your Password

Your Strata CS System Administrator gave you your initial password. You should enter a new password that will be more secure.

1. Pick up the phone and press #.
2. Follow the prompts to log in, and then press 63 to change your password.

You should choose a secure password. A secure password has at least five digits and contains neither your extension number nor repeating digits (111), nor sequential digits (123). Your system may enforce some of these guidelines as requirements.

# Placing Calls

Strata CS enables you to place calls either manually using the phone or visually using ViewPoint.

## Using the Phone

- To call another extension pick up the handset and dial the extension.
  - To call an external number dial an access code (usually 9) and the number. Your Strata CS system administrator can tell you the access codes to dial for various types of external calls.
  - To call direct to voice mail, dial the extension followed by \*. (May not be enabled for your system.)
- **To call while on another call**
1. Press Flash #. Your caller is put on hold.
  2. Dial the number.
  3. To switch between calls, press Flash.

## Using ViewPoint

- **To call another extension**
1. Choose File > New > Call.
  2. In the Place Call To dialog box, click Extensions and then click the extension you want to call.
  3. Click OK.
- **To call an external number**
1. Choose File > New > Call.
  2. From the Call Using drop-down list, select the access code and dialing service to use.
  3. In Name/Number, enter the number to dial. Then click OK to place the call.

## Quick Ways to Place Calls with ViewPoint

You can also use the *Dial* field on the toolbar to place a call. Type an extension or phone number and press **Enter**. You can also type the name of a user or contact or drag-and-drop text into it.

You can also right-click an extension or contact in the Phonebook pane of the Call Monitor folder and choose Speed Dial or Place Call.

# Answering Calls

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

## Using the Phone

- To answer your phone pick up the handset.
- **To answer another ringing phone**

1. Pick up your handset.
2. Press \* 91 #. If more than one phone is ringing, enter the extension that you want to answer before pressing #.

## Call From Prompt

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

1. Press 1. Accept the call.
2. Press 2 or hang up. Send the call to voice mail. (Hanging up sends them to your next routing list action; pressing 2 sends them to the final action.)
3. Press 3. Send the call to voice mail and monitor the message as it is being left. (To pick up, press Flash 1.)

## Turning Off Call From Prompt

1. In ViewPoint, choose Tools > Options.
2. Click the Phone > Call Announcing tab.
3. Uncheck Internal, External, and External Direct. Click OK.

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

## Using ViewPoint

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

# Transferring Calls

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

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

## Using the Phone

### ► To perform a blind transfer

1. Press Flash 1.
2. Enter the extension or external number (incl. access code).
3. Hang up to complete the transfer.

### ► To perform a supervised transfer

1. Press Flash 1.
2. Enter the extension. You are connected to the recipient, and the caller is put on hold.
3. To complete the transfer, hang up

...or

To cancel the transfer, press Flash 1. You are reconnected with the caller. If you have turned on direct transfer, use just Flash.

## Using ViewPoint

### ► To perform a transfer

1. In the Call Monitor view, click the call that you want to transfer.
2. Choose Actions > Transfer.
3. Select the recipient (if it is an extension or contact) or enter the phone number.
4. To perform a blind transfer, click Blind > OK

...or

To perform a supervised transfer, click Supervised > OK.

5. To complete the transfer, click Complete

...or

To cancel the transfer and return to the caller, click Cancel.

## Drag-and-drop Transfers

With the Phone pane turned on in the Call Monitor view (View > Phonebook Pane), you can blind-transfer a call by dragging it from the Call Monitor to the extension. **CTRL**-drag to do a supervised transfer. **ALT**-drag to transfer directly to the extension's voice mail. **SHIFT**-drag to open the Transfer To dialog box.

# Call Handling

See the *Strata CS Client User Guide* for many more call handling options.

## Placing a Call On Hold

### Using the Phone

- To place a call on hold press Flash. To return to the caller, press Flash again.
- To place a caller on hold without hearing the telephone command prompts, press Flash 7.

### Using ViewPoint

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

## Creating Conference Call

### Using the Phone

1. Place the first call.
2. Press Flash # to put the call on hold and place the second call.
3. Repeat for subsequent calls.
4. When you have placed all calls, press Flash 5 to conference them together.

### Using ViewPoint

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

You can also create a conference with drag-and-drop by dragging an extension from the Phonebook pane to a call in the Call Monitor. The extension is added to the call.



# Voice Messages

Managing voice mail is easy using the phone or Client.

## Using the Phone

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

Enter multiple extensions like this: ext1 # ext2 # ext3 # #

## Using ViewPoint

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

- To save a message drag the message to the Saved folder or to another folder of your own creation.
- To create a new folder right-click Inbox in the Folder List and choose New Folder.
- To delete a message click the message and press **Delete**. The message moves to the Deleted folder.
- To delete the message permanently empty the Deleted folder by choosing Tools > Empty Deleted Folder.
- To view the Folder List choose All Folders in the Navigation pane.

# Greetings


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



## Using the Phone

- To log in at your phone press # <password> #.
- To log in at another phone press # <your extension> # <password> #.
- To hear your greeting log in and press 41.
- To record a new greeting log in and press 46.
- **To change the active greeting**
  1. Log in and press 4.
  2. After a greeting plays, press 2 to advance to the next greeting.
  3. When you reach the greeting you want to make active, press 3.

## Using ViewPoint

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

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

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

# Personal Status

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

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

## Changing Your Personal Status

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

### ➤ To change your personal status

- In ViewPoint, click  Available ▾ and choose another personal status

...or

Using the phone, log in and press 61.

## Predefined Statuses

The following statuses are predefined in Strata CS:

- Available. Indicates that you are at your desk and ready to receive calls.
- Do Not Disturb. Sends your incoming calls directly to voice mail without ringing your phone.
- In a Meeting / Out of the Office / On Vacation. Same as DND, and tells people where you are.
- Agent Status (for Call Center Agents only). Indicates whether they are taking queue calls.

- To edit a personal status, double-click it in the ViewPoint's Personal Statuses view.

## Custom Personal Statuses

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

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

# Forwarding Calls

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


## Using the Phone

- To log in at your phone press # <password> #.
- To log in at another phone press # <your extension> # <password> #.
- To forward your calls to another extension log in and press 52. Enter the extension.
- From another extension log in and press 51.
- **To forward your calls to an external number**
  1. Log in and press 53.
  2. Enter the phone number as you would dial it, including the access code (usually 9).

**Note** From an external phone that supplies Caller ID, you can call your office, log in, and press 51.

- To turn off call forwarding log in and press 54.

## Using ViewPoint

- **To forward your calls to another extension**
  1. Choose Tools > Call Forwarding. Check Forward Calls.
  2. Enter the extension under Name/Extension. Click OK.
- **To forward your calls to an external number**
  1. Choose Tools > Call Forwarding. Check Forward calls.
  2. From the Call Using drop-down list, select the access code to use (usually 9).
  3. Click OK.
- **To forward your calls from a remote location**
  - Log into ViewPoint using the Remote Number option, then check Forward my calls... at the next dialog box.
- **To turn off call forwarding**
  1. Choose Tools > Call Forwarding or click  on the status bar.
  2. Uncheck Forward calls.

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

# Contacts

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

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

## Entering Contact

1. In ViewPoint, click File > New > Contact.
2. In the Contact dialog box, enter the contact's information (click Help for assistance) and click OK.

## Contact Voice Titles

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

## Placing Call to a Contact

### Using ViewPoint

1. Type a portion of the contact's name in the toolbar *Dial* field in ViewPoint.
2. Press **Enter** to place the call.

...or

1. Right-click a Contact in the Contacts folder or Phonebook pane.
2. Choose **Speed Dial** or **Place Call**. With **Place Call** you can select the number to dial.

...or

1. Choose File > New > Call from any folder.
2. Click **Contacts**.
3. Select the contact and click **OK**.

# Caller Recognition

Strata CS recognizes contacts when they call by their Caller ID numbers (or PIN numbers – see below). Each contact has a list of phone numbers that Strata CS uses to identify that contact.

- To view the list double-click the contact in the Contacts view and click the Caller Identification tab.

## Adding a Phone Number for Contact Recognition

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

- Enter the phone number as one of the contact's phone numbers and check "Use phone number as caller identification for this contact."

...or

1. When the contact calls, associate the Caller ID number of the call with the contact.
2. Select either the active call in the Call Monitor, the record of the call in the Call Log, or the voice message from a Voice Mail folder.
3. Choose Actions > Associate.
4. In the Associate dialog box, select the contact. Select whether to use the Caller ID name or number for contact recognition.
5. Click OK.

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

## Contact PINs

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

- **To assign a contact PIN to a contact**

1. Right-click the contact.
2. Select Open.
3. Click the Caller Identification tab and enter the PIN number.

# Routing Lists

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

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

An easy way to switch between routing lists is to create custom personal statuses that use the different routing lists, and switch between those.


## Example Routing Lists

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

## Creating Routing List

- In ViewPoint, click File > New > Routing List.

## Changing Active Routing List

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

# Call Rules

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

## Creating Call Rule

- In ViewPoint, choose File > New > Call Rule.

## Ways to Distinguish Incoming Calls

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

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

## Ways to Change How Call Is Handled

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

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



# Handsfree and Voice-first Answering

Hands-free and voice-first answering are special modes that make answering the phone easier for high-volume or headset phone users.

## Using Handsfree answering

Handsfree answering is primarily an aid for headset and speakerphone users. It enables you to answer calls without picking up and holding a receiver.

### Turning Handsfree Answering On and Off

1. Choose Tools > Options and click the Phone tab.

2. Check or uncheck Enable handsfree answering.

...or

➤ Pick up the telephone and press \* 10 to toggle the handsfree answering feature on and off.

## Placing/Answering Calls with Handsfree Answering

With handsfree answering, the phone is considered to be off-hook, but you do not hear a dial tone.

➤ To place a call press Flash to get a dial tone. Incoming calls do not ring your phone, but are signaled by a beep.

You do not need to pick up the handset to answer an incoming call. After you hear the beep, you are connected with the caller and can start talking (unless you have announce caller on).

## Using Voice-first Answering

Voice-first answering enables you to treat your incoming internal calls as intercom calls. When an internal call arrives, your phone does not ring. Instead, a beep plays, and a two-way audio connection is established over your speakerphone. You can speak without lifting the receiver. (External calls ring your phone as usual.)

You must have a Toshiba, Cybiolink, or Aastra phone to use voice-first answering.

### Turning Voice-first Answering On and Off

1. Choose Tools > Options.

2. On the General tab, check or uncheck Enable voice-first answering.

# Intercom and Paging

Users do not receive an intercom call or page under the following circumstances:

- If they are using the phone; for example, if they are in a call.
- If they have the Do Not Disturb personal status selected.

If you have permission, you can dial \*15 plus an extension to place an intercom call or page as follows:

## Making an Intercom Call

- Dial \*15 plus a user's extension. Places an intercom call, a two-way audio connection with the user's speakerphone. You can speak with the user without the user needing to pick up the phone.

## Paging

- Dial \*15 plus a workgroup's extension. Places a page, a one-way audio connection to all users within the workgroup. When you speak, your voice is heard over the workgroup's speakerphones.

You might experience a delay before the page is connected, depending on the size of the workgroup being paged. When you hear the beep, you may begin speaking.

**Note** By default, you have 30 seconds after hearing the beep to speak, before the page ends automatically. Your system administrator may have changed that time limit.

## Who Can Receive Intercom Calls and Pages

In order to receive an intercom call or page, you must have a Cybiolink, Aastra, or Toshiba Strata phone, with that phone type selected in ViewPoint under Tools > Options on the Phone tab, or a regular analog phone with hands-free mode enabled.

# Call Center Agents

If you are a Call Center Agent, this page provides the commands you need to know.

## Working In Call Center Queue

The following functions can be done in either ViewPoint or by telephone.

### Start of Workday

Select one of the following personal status commands:

- Dial \*50 (Available) to receive queue and non-queue calls.

...or

- \*51 (Available Queue Only) to receive only queue calls.

Non-queue calls are sent to voice mail.

### Breaks

1. Dial \*53 (On Break).
2. When your break is over, dial \*50 or \*51.

### End of Workday

- Dial \*52 (Available Non-Queue).

### Signing In/Out of Queues

- Using ViewPoint, select Tools > Queue Sign In/Out.

**Note** When you are signed out of a queue, you do not receive calls from it.

## Working In ACD Workgroup

### ➤ To begin taking ACD Workgroup calls

1. Using ViewPoint, select Tools > Options > Incoming Calls tab.
2. Check “Accept ACD Workgroup calls.”
3. Click OK.

### ➤ To stop taking calls

- Uncheck “Accept ACD Workgroup calls” field.

## Using Call Monitor

### ➤ To monitor and control call center calls visually

- Use the appropriate tab of ViewPoint’s Call Monitor. You will see a separate tab for each queue or ACD Workgroup in which you are an agent.

# Remote Use of Strata CS

You can access most Strata CS features from a remote telephone. You can use the telephone commands from your home or cell telephone just as if from your office phone.

**Note** When using telephone commands from a remote phone, you must press \*\* instead of Flash.

## Log In from Remote Telephone

1. Call your office.
2. At system prompt, press # <your extension> # <your password> #. You can now listen to your voice messages, manage your greetings, or forward your calls, etc.

## Log Out of Remote Access

- Before hanging up, press \*96. This logs you off the system and clears your telephone line so that you can immediately make other calls.

## Place Calls Through Strata CS

1. Log in.
2. Press # for a dial tone, and dial the number including the access code.

**Note** # gives you an internal Strata CS dial tone, so you can dial Strata CS extensions or use the telephone commands.

3. Press 3 to end the call and remain logged in to Strata CS. This returns you to the voice mail/account menu.

...or

press \*96 and hang up to log off of the system and clear your phone.



















## Using ViewPoint with a Remote Telephone

You can use ViewPoint or ViewPoint Web Access to place, answer, and handle calls with your remote cell or home telephone. Note, that when you place a call from ViewPoint, Strata CS calls you, saving you the charge.

1. Click Options > Remote Number.
2. Enter the telephone number of the remote telephone. Click OK.
3. On the next screen, click “Forward my calls to this number.” This gives you ViewPoint control on your incoming Strata CS calls.

# ViewPoint Folders

Use the Navigation pane on the left side of the ViewPoint window to choose folders. Folders appear in the Favorite Folders list when you click the Navigation pane icon shown.

Navigation pane	Folder	Description
		<b>Call Monitor</b> Place calls and handle incoming calls (transfer calls, create conference calls, monitor voice mail).
		<b>Voice Mail \ Inbox</b> Hear and manage your voice messages. To call back a message, right-click it and choose Place Call.
		<b>Contacts</b> Manage an online phone book of your telephone contacts.
		<b>Call Log</b> View a record of all your phone calls. To return the call, right-click it and choose Place Call.
		<b>Call Monitor \ Extensions</b> View all TeleVantage extensions, their personal statuses, and who is on the phone now.
		<b>Call Monitor \ Queue Monitor</b> Call Center agents only. View and manage agents, and view real-time queue statistics.
		<b>Configuration \ Call Rules</b> Set up custom call handling for individual callers or for specific dates or times.
		<b>Configuration \ Greetings</b> Record your voice-mail greetings and change the active greeting.
		<b>Configuration \ Personal Statuses</b> Manage personal statuses that communicate your location and availability to your coworkers and control how your incoming calls are handled.
		<b>Configuration \ Routing Lists</b> Set up "follow me" call forwarding (calls ring a series of numbers to find you), and direct calls to workgroups or other extensions.
		<b>Configuration \ Workgroups</b> Define groups of users and contacts. You can then send voice messages to the group, call all group phones, share your ViewPoint folders with the group, and more.

# NOTES

- Direct transfer is a special mode for users who only answer and transfer calls. In direct transfer mode you can transfer a call simply by pressing **Flash**. The other telephone commands on the call handling menu are not available to you. To change your transfer mode, talk to your system administrator.
  - If you frequently work from the same remote telephone, your system administrator can define the telephone as an external station. If your remote telephone is an external station, do not forward your calls—they will come to you automatically.
- **To use ViewPoint at your remote telephone**
- Log on using your external Station ID.
- **To change the number that your external station calls (e.g., from home to cell)**
- Click Tools > Options > Phone\Station Features tab.













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