

Documentation

OpenScape UC Application V7 Executive/Assistant Cockpit

User Guide

A31003-S5070-U105-1-7619

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E/A Cockpit

The Executive/Assistant Application for your OpenStage 60/80

The Executive/Assistant application **E/A Cockpit** is an XML application especially designed for the OpenStage 60 and OpenStage 80 phones. The application interacts with the OpenScape Voice to provide the intuitive Executive/Assistant functions.



The application comprises the following functions:

- Optimizing the call processes of an executive with support by one or more Assistants
- Executive calls are controlled and managed by the Assistant; support with high flexibility
- All incoming calls for the Executive are answered by one or more Assistants exactly as desired by the Executive
- Incoming calls for the Executive are forwarded directly to the Assistant or signaled simultaneously at both the Executive and the Assistant
- The Assistant can always monitor incoming calls for the Executive and respond accordingly

On the following pages, you will find information on the operation and the menus of E/A Cockpit for you as Executive or Assistant.

Finally, its functionality will be explained by means of an example.

E/A Cockpit

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E/A Cockpit for you as Executive

Stay available. Communicate flexibly. Start now!

E/A Cockpit will ensure you never miss another call. This is the quick and easy way to define your status. You decide what is to happen to the calls, depending on the status of your assistant. Stay available, both by means of the voicemail option or using your mobile phone. Start right now!

Start E/A Cockpit

At a glance:

☰ **Applications** ▷ ⬆ **E/A Cockpit** OK

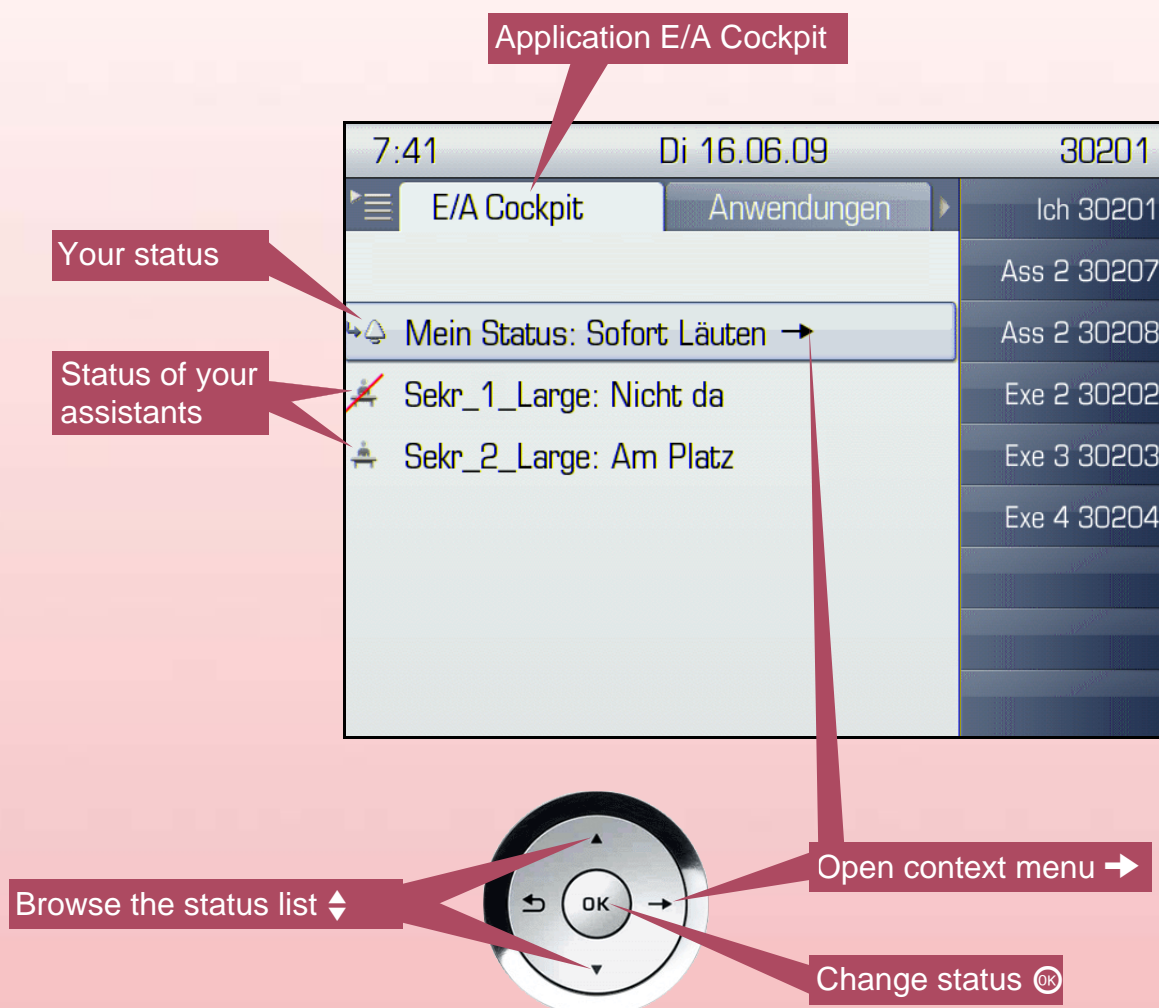
Step-by-step:

- Press ☰ (more than once if necessary) to select the **Applications** entry.
- Use ⬆ to select the **E/A Cockpit** entry and confirm with OK.
- The E/A Cockpit status overview appears. You can now use E/A Cockpit.



Your E/A Cockpit status overview

The status overview contains all the key information about all users in your E/A Cockpit group.



E/A Cockpit for you as Executive

Configure E/A Cockpit as required

Change your status

Define your own E/A Cockpit status.

Requirement: The E/A Cockpit status overview is displayed.

At a glance:

My status: ... > **Immediate Ring** | **To Assistant ...** | **To Mobile** | **To Voicemail** | **To ...**

Step-by-step:

- Confirm the **My Status** entry with .
- Use to select one of the entries from the list and confirm with .
- Immediate Ring:** Your call will ring on your phone.
- To Assistant ...:** Your call will be forwarded to your assistant. Forwarding depends on the status of your assistant and on the assistant forwarding option you have chosen. For how to set up forwarding to the assistant, see **Define the mode for forwarding to your assistant**.
- To Mobile:** Your call will be forwarded to a mobile phone. The mobile phone number will be entered by the responsible specialist and released.
- To Voicemail:** Your call will be forwarded to voicemail. The voicemail number will be entered by the responsible specialist and released.
- To ...:** Your call will be forwarded to a phone number nominated by you. For how to define the phone number, see **Define a phone number for forwarding**.
- The E/A Cockpit status overview is displayed. Your status is now set up.

If configured by your administrator, you can change these statuses also via freely programmable sensor keys on your telephone OpenStage 60/80.

Define the mode for forwarding to your assistant

If you wish to forward your calls to your assistant, you can link this forwarding to specific conditions.

Requirement: The E/A Cockpit status overview is displayed.

At a glance:


➔ > **Settings** > **Soft** | **Regular Voicemail** | **Regular Mobile** | **Regular to number** | **Strict**

Step-by-step:

- Open the context menu with ➔.
- Use to select the **Settings** entry and confirm with .
- Use to select one of the entries from the list and confirm with .
- Soft** : If your assistant is at his/her desk, your call will be forwarded there. E/A Cockpit will otherwise look for an active deputy. If no active deputy is available, your call will ring at your telephone.
- Regular Voicemail:** If your assistant is at his/her desk, your call will be forwarded there. E/A Cockpit will otherwise look for an active deputy. If no active deputy is available, the call will be forwarded to voicemail.
- Regular Mobile:** If your assistant is at his/her desk, your call will be forwarded there. E/A Cockpit will otherwise look for an active deputy. If no active deputy is available, the call will be forwarded to a mobile phone. The mobile phone number will be entered by the responsible specialist and released.
- Regular to number:** If your assistant is at his/her desk, your call will be forwarded there. E/A Cockpit will otherwise look for an active deputy. If no active deputy is available, the call will

E/A Cockpit for you as Executive

be forwarded to a phone number you have defined. For how to define the phone number, see **Define a phone number for forwarding**.

 **Strict:** Your call will always be forwarded to your assistant or his/her deputy. E/A Cockpit will heed the sequence of assistants set by the administrator, starting with your first (preferred) assistant. The assistants of a group are always preferred to deputies. If neither assistants nor deputies are available, the call will be routed back to your first (preferred) assistant or his/her deputy. Only if all assistants and deputies have status “Off Desk”, calls will be routed back to you.

- The E/A Cockpit status overview appears. The mode for forwarding calls to your assistant is now set up.

Change the status of your assistant or his/her deputy



Define the E/A Cockpit status of your assistant or his/her deputy (provided the deputy is member of an E/A Cockpit group).

Requirement: The E/A Cockpit status overview is displayed.

At a glance:


◆ [Assistant Name]: ...  ▷ ◆ **At Desk** | **Off Desk** | **To Mobile** | **To Voicemail** | **To ...** | **Deputy ... on/off** 


Step-by-step:


- Use ◆ to select the entry for the required assistant and confirm with .
- Use ◆ to select one of the entries from the list and confirm with .

 **At Desk:** Your assistant is at his/her desk.

 **Off Desk:** Your assistant is not at his/her desk.

 **To Mobile:** The call to your assistant will be forwarded to a mobile phone. The mobile phone number will be entered by the responsible specialist and released.

 **To Voicemail:** The call to your assistant will be forwarded to voicemail. The voicemail number will be entered by the responsible specialist and released.

 **To ...:** Your call will be forwarded to a phone number nominated by your assistant.

Deputy ... on/off: The deputy for your assistant is activated/deactivated.





- The E/A Cockpit status overview appears. The status of the assistant is now set up.

Define a phone number of your own for forwarding




You can choose any phone number as the call forwarding destination.

Requirement: The E/A Cockpit status overview is displayed.

At a glance:

➔ ▷ ◆ **Forward Nr.**  ▷ ◆ **Number**  ▷  ▷ ◆ **Save & exit** 

Step-by-step:

- Open the context menu with ➔.
- Use ◆ to select the **Forward Nr.** entry and confirm with .
- Use ◆ to select the **Number** entry and confirm with .
- Enter the required call forwarding number.
- Use ◆ to select the **Save & exit** entry and confirm with .
- The E/A Cockpit status overview appears. Your own phone number is now defined for forwarding.

E/A Cockpit for you as Executive

Make your work easier with E/A Cockpit

Choose one of the E/A Cockpit mobile phone numbers

You can now call a mobile phone number from the list set up in E/A Cockpit.
Requirement: The E/A Cockpit status overview is displayed.

At a glance:

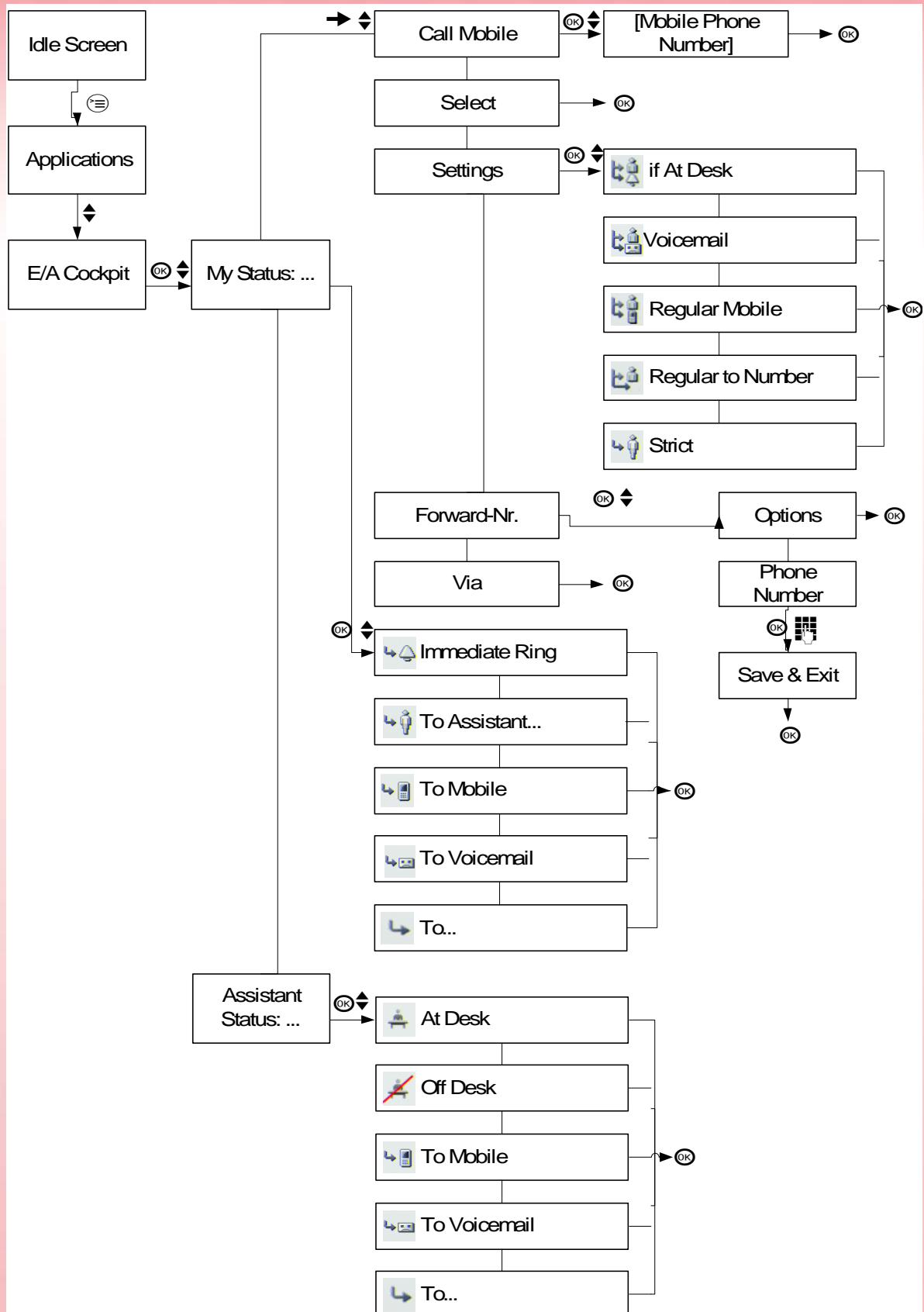
➔ ▷ **Call mobile** Ⓚ ▷ ⬇ [Mobile phone number] Ⓚ

Step-by-step:

- Use ➔ to open the context menu and confirm the **Call mobile** entry with Ⓚ.
- Use ⬇ to select the required mobile phone number and confirm with Ⓚ.
- The telephony interface is displayed. The mobile phone number is called.

E/A Cockpit for you as Executive

Keep track: The E/A Cockpit operating menu



E/A Cockpit for you as Assistant

Stay available. Communicate flexibly. Start now!

E/A Cockpit will ensure you never miss another call. This is the quick and easy way to define your status. Choose a deputy. Stay available, both by means of the voicemail option or using your mobile phone. Start right now!

Start E/A Cockpit

At a glance:

☰ **Applications** ▸ ⬆ **E/A Cockpit** Ⓞ

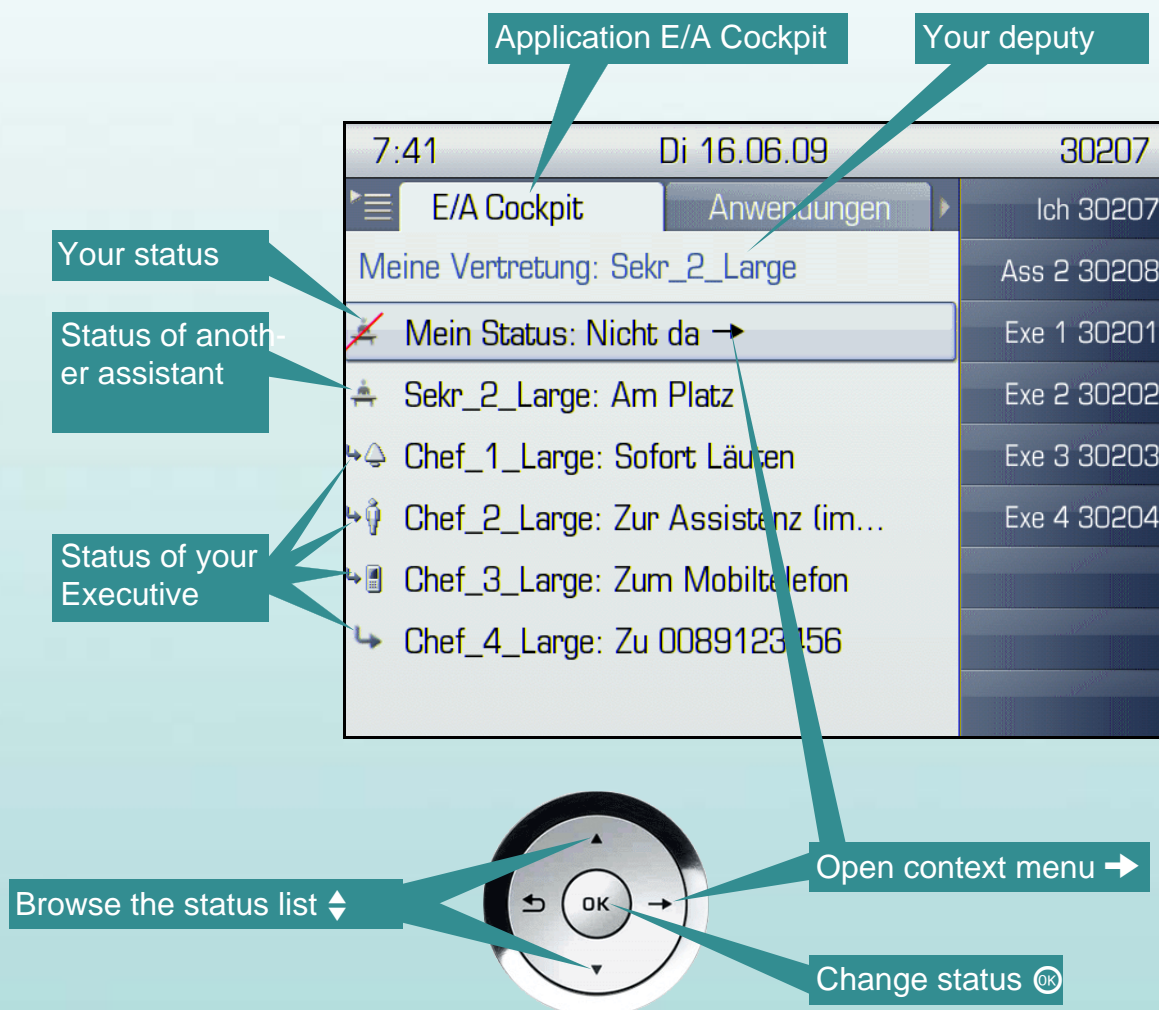
Step-by-step:

- Press ☰ (more than once if necessary) to select the **Applications** entry.
- Use ⬆ to select the **E/A Cockpit** entry and confirm with Ⓞ.
- The E/A Cockpit status overview appears. You can now use E/A Cockpit.



Your E/A Cockpit status overview

The status overview contains all the key information about all users in your E/A Cockpit group.



E/A Cockpit for you as Assistant

Configure E/A Cockpit as required

Change your status

Define your own E/A Cockpit status.

Requirement: The E/A Cockpit status overview is displayed.

At a glance:

My status: ... > **At Desk** | **Off Desk** | **To Mobile** | **To Voicemail** | **To ...** | **Deputy ... on/off**

Step-by-step:

- Confirm the **My Status** entry with .
- Use to select one of the entries from the list and confirm with .
- At Desk:** You are at your desk.
- Off Desk:** You are not at your desk.
- To Mobile:** The call will be forwarded to a mobile phone. The mobile phone number will be entered by the responsible specialist and released.
- To Voicemail:** The call will be forwarded to voicemail. The voicemail number will be entered by the responsible specialist and released.
- To ...:** The call will be forwarded to a phone number nominated by you. For how to define the phone number, see **Define a phone number for forwarding**.
- Deputy ... on/off:** Your deputy, who has a defined deputy number, is activated/deactivated. For how to define a deputy number see **Choose your deputy**.
- The E/A Cockpit status overview appears. Your status is now set up.

If configured by your administrator, you can change these statuses also via freely programmable sensor keys on your telephone OpenStage 60/80.

Choose your deputy.

You can now choose a personal deputy by transferring your function within your E/A Cockpit group. The deputy need not necessarily be a member of an E/A Cockpit group. However, please note that only members of an E/A Cockpit group can make full use of the E/A Cockpit application and that their availability can be checked by the E/A Cockpit application only.

If your deputy is member of an E/A Cockpit group, his/her phone display will show both the members of his/her own E/A Cockpit group and the members of the group of the assistant he/she is deputizing for. These are marked with an asterisk.

Requirement: The E/A Cockpit status overview is displayed.

At a glance:

> **Deputy Nr.** > **Number** > > **Save & exit**

Step-by-step:

- Open the context menu with .
- Use to select the **Deputy Nr.** entry and confirm with .
- Use to select the **Number** entry and confirm with .
- Enter the required deputy number.
- Use to select the **Save & exit** entry and confirm with .
- The E/A Cockpit status overview appears. The phone number of your deputy is now defined.

E/A Cockpit for you as Assistant

Define a phone number of your own for forwarding

You can choose any phone number as the call forwarding destination.
Requirement: The E/A Cockpit status overview is displayed.

At a glance:

➔ ▷ ⬇ **Forward Nr.** ▷ ⬇ **Number** ▷ ▷ ⬇ **Save & exit**

Step-by-step:

- Open the context menu with ➔.
- Use ⬇ to select the **Forward Nr.** entry and confirm with .
- Use ⬇ to select the **Number** entry and confirm with .
- Enter the required call forwarding number.
- Use ⬇ to select the **Save & exit** entry and confirm with .
- The E/A Cockpit status overview appears. Your own phone number is now defined for forwarding.

Change the status of your assistant colleagues

Define the E/A Cockpit status of your assistant colleagues.
Requirement: The E/A Cockpit status overview is displayed.

At a glance:

⬇ **[Assistant Name]: ...** ▷ ⬇ **At Desk | Off Desk | To Mobile | To Voicemail | To ... | Deputy ... on/off**

Step-by-step:

- Use ⬇ to select the entry for the required assistant and confirm with .
- Use ⬇ to select one of the entries from the list and confirm with .
- **At Desk:** The assistant is at his/her desk.
- **Off Desk:** The assistant is not at his/her desk.
- **To Mobile:** The call to the assistant will be forwarded to a mobile phone. The mobile phone number will be entered by the responsible specialist and released.
- **To Voicemail:** The call to the assistant will be forwarded to voicemail. The voicemail number will be entered by the responsible specialist and released.
- **To ...:** The call will be forwarded to a phone number nominated by the assistant.
- **Deputy ... on/off:** The assistant's deputy, who has a defined deputy number, is activated/deactivated.
- The E/A Cockpit status overview appears. The status of the assistant is now set up.

E/A Cockpit for you as Assistant

Change the status of your executive

Define the E/A Cockpit status of your executive.

Requirement: The E/A Cockpit status overview is displayed.

At a glance:

◆ [Executive Name]: ... ▷ ◆ Immediate Ring | To Assistant ... | To Mobile | To Voicemail | To ...

Step-by-step:

- Use ◆ to select the entry for the required executive and confirm with .
- Use ◆ to select one of the entries from the list and confirm with .

Immediate Ring: The call is signaled on the executive's phone.

To Assistant ...: The executive's call is forwarded to his/her assistant. Forwarding depends on the status of his/her assistant and on the assistant forwarding the executive has chosen.

If configured by your administrator, you can change these two statuses also via freely programmable sensor keys on your telephone OpenStage 60/80.

To Mobile: The call will be forwarded to a mobile phone. The mobile phone number will be entered by the responsible specialist and released.

To Voicemail: The call will be forwarded to voicemail. The voicemail number will be entered by the responsible specialist and released.

To ...: The call will be forwarded to a phone number nominated by the executive.

- The E/A Cockpit status overview appears. The status of the executive is now set up.

Define the mode for assistant forwarding by your executive.

If your executive wishes to forward your calls to the assistant, you can link this forwarding to specific conditions.

Requirement: The E/A Cockpit status overview is displayed.

At a glance:

◆ [Executive Name]: ... ▷ ➔ ▷ ◆ Settings ▷ ◆ Soft | Regular Voicemail | Regular Mobile | Regular to number | Strict

Step-by-step:

- Use ◆ to select the entry for the required executive and confirm with .
- Open the context menu with ➔.
- Use ◆ to select the **Settings** entry and confirm with .
- Use ◆ to select one of the entries from the list and confirm with .

Soft : If the assistant is at his/her desk, the call will be forwarded there. E/A Cockpit will otherwise look for an active deputy. If no active deputy is available, the call will ring at the Executive's phone.

Regular Voicemail: If the assistant is at his/her desk, the call will be forwarded there. E/A Cockpit will otherwise look for an active deputy. If no active deputy is available, the call will be forwarded to voicemail.

Regular Mobile: If the assistant is at his/her desk, the call will be forwarded there. E/A Cockpit will otherwise look for an active deputy. If no active deputy is available, the call will be forwarded to a mobile phone. The mobile phone number will be entered by the responsible specialist and released.

Regular to number: If the assistant is at his/her desk, the call will be forwarded there. E/A Cockpit will otherwise look for an active deputy. If no active deputy is available, the call will be forwarded to a phone number defined by the executive.

Strict: The call will always be forwarded to the assistant or his/her deputy. E/A Cockpit will heed the sequence of assistants set by the administrator, starting with the first (preferred) assistant.

E/A Cockpit for you as Assistant

The assistants of a group are always preferred to deputies. If neither assistants nor deputies are available, the call will be routed back to the first (preferred) assistant or his/her deputy. Only if all assistants and deputies have status “Off Desk”, calls will be routed back to the executive.

- The E/A Cockpit status overview appears. The mode for forwarding to the assistant of your executive is now set up.

Define a phone number to which calls for your executive are to be forwarded





You can choose any phone number as the call forwarding destination for your executive.

Requirement: The E/A Cockpit status overview is displayed.

At a glance:

◆ [Executive Name]: ...  ▷ ➔ ▷ ◆ Forward Nr.  ▷ ◆ Number  ▷  ▷ ◆ Save & exit 

Step-by-step:

- Use ◆ to select the entry for the required executive and confirm with .
- Open the context menu with ➔.
- Use ◆ to select the **Forward Nr.** entry and confirm with .
- Use ◆ to select the **Number** entry and confirm with .
- Enter the required call forwarding number.
- Use ◆ to select the **Save & exit** entry and confirm with .
- The E/A Cockpit status overview appears. The phone number to which calls to your executive are to be forwarded is now defined.

E/A Cockpit for you as Assistant

Make your work easier with E/A Cockpit

Choose one of the E/A Cockpit mobile phone numbers

You can now call a mobile phone number from the list set up in E/A Cockpit.
Requirement: The E/A Cockpit status overview is displayed.

At a glance:


➔ ▷ **Call mobile** Ⓞ ▷ ⬇ [Mobile phone number] Ⓞ

Step-by-step:

- Use ➔ to open the context menu and confirm the **Call mobile** entry with Ⓞ.
- Use ⬇ to select the required mobile phone number and confirm with Ⓞ.
- The telephony interface is displayed. The mobile phone number is called.

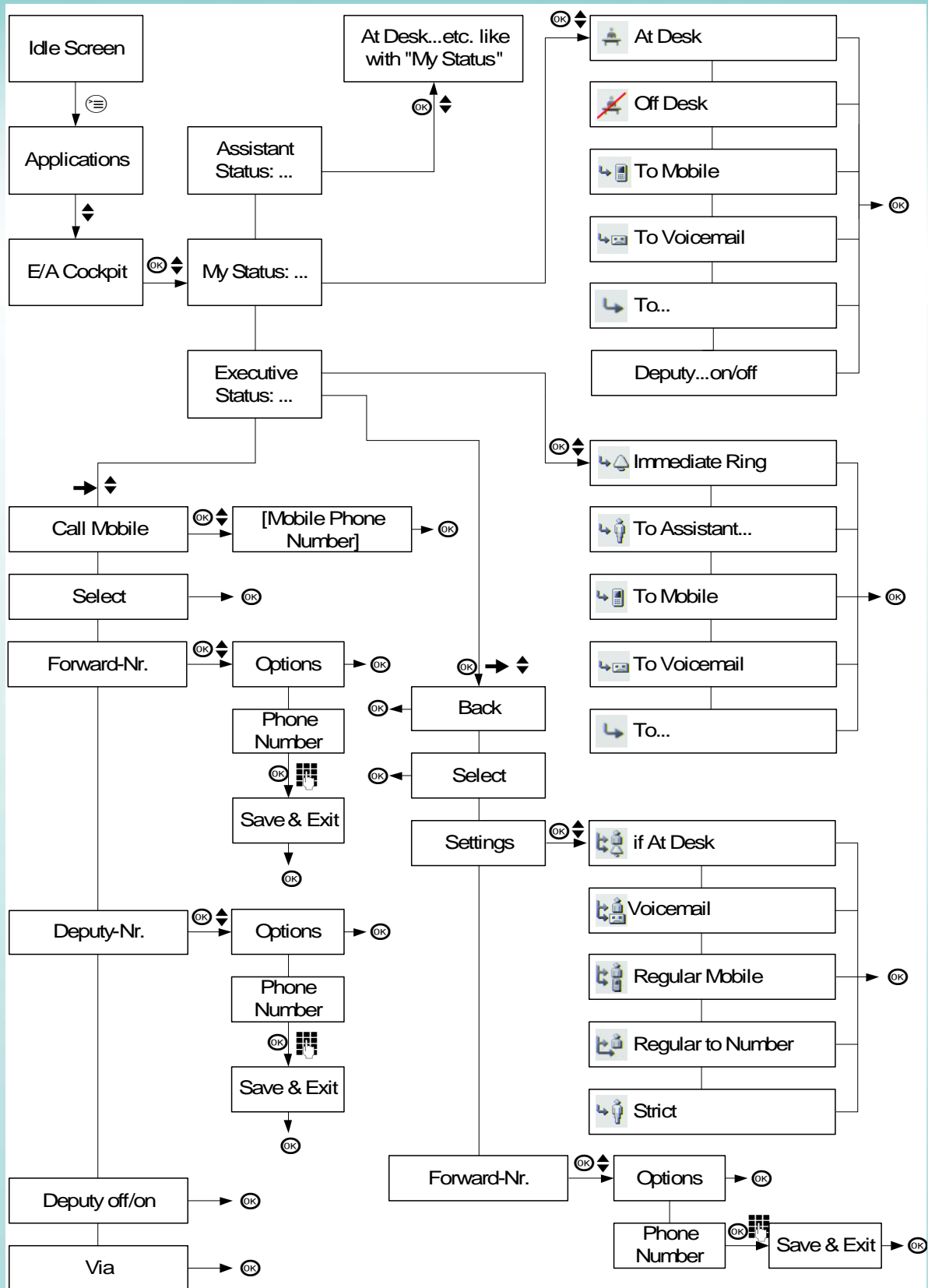
Respond to new voicemail messages for your executive

A symbol will be used to attract your attention if a new voicemail message for your executive has been received.

The  symbol appears on your phone display in front of the number of the executive who has received a new voicemail message. The symbol appears until your executive has listened to all new messages.

E/A Cockpit for you as Assistant

Keep track: The E/A Cockpit operating menu



E/A Cockpit – Example

Stay available. Communicate flexibly. Start now!

The following example will show how E/A Cockpit works. This scenario is shown from the viewpoint of Peter Arnold and his assistant Claudia Stein.

The initial situation

The executive is using an OpenStage 80:

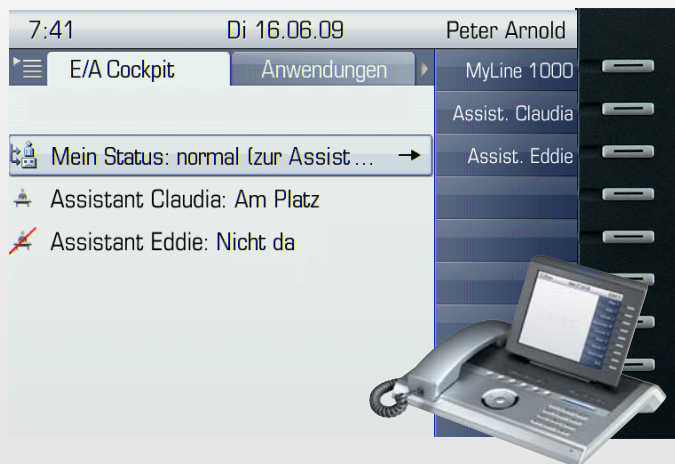
Peter Arnold is in an important meeting and has therefore forwarded all his calls to his assistant, Claudia Stein. When she is not at her desk, calls are to be answered by voicemail.

Mr. Arnold only wants to receive calls from one of his customers, Mr. Nicolas.

The assistant is using an OpenStage 60:

Claudia Stein is at her desk and can answer calls on behalf of Mr. Arnold.

Her phone allows her to see that calls for Mr. Arnold are to be forwarded to his assistant.



Sample scenario

1



Customer Mr. Nicolas dials Mr. Arnold's number: 15619241000

The call is automatically forwarded to the phone of Mr. Arnold's assistant,



Executive's phone Arnold



Assistant's phone Claudia

E/A Cockpit – Example

2

Hello, this is Mr. Nicolas. I'd like to speak to Mr. Arnold please.

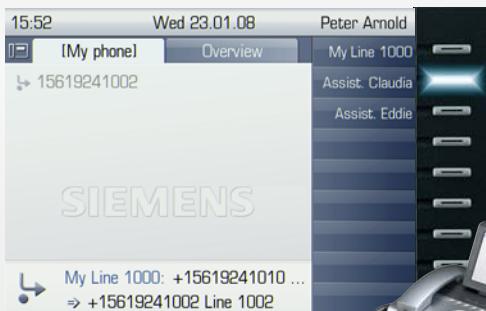


Assistant Claudia Stein can see that the call has been forwarded from the executive phone and answers accordingly.

*Mr. Arnold's office,
Claudia Stein speaking.
How can I help you?*

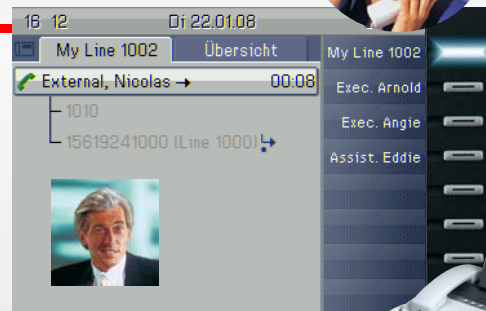


Call is connected



Lights up

Executive's phone Arnold



Flashes fast

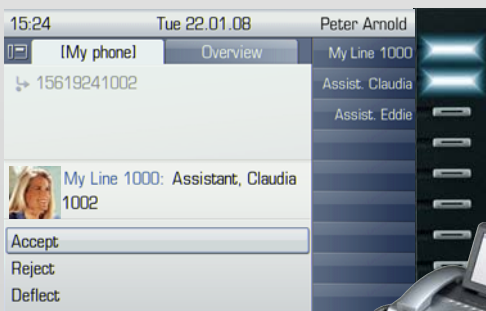
Assistant's phone Claudia

3

Assistant Claudia calls Mr. Arnold using the relevant direct station selection key. The external call is automatically placed on hold.



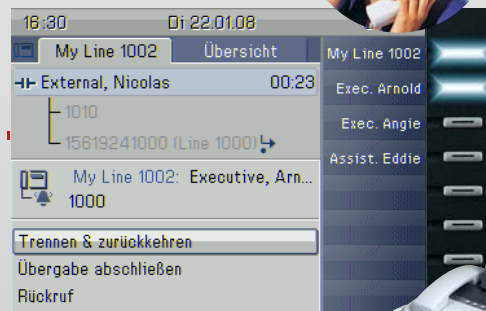
Mr. Nicolas is on hold



Flashes slowly
Lights up

Mr. Arnold is called

Executive's phone Arnold



Flashes fast
Lights up

Assistant's phone Claudia

E/A Cockpit – Example

4

Hi Claudia! What's up?



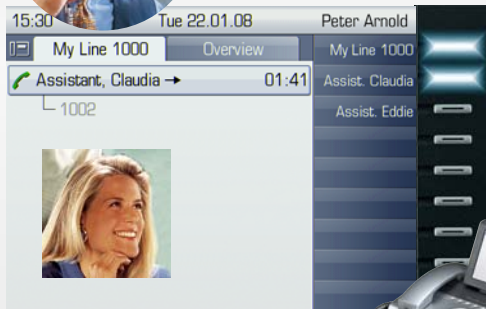
Sure!



Mr. Nicolas is on hold

Mr. Arnold answers his assistant's call. Claudia asks if he wishes to take the external call.

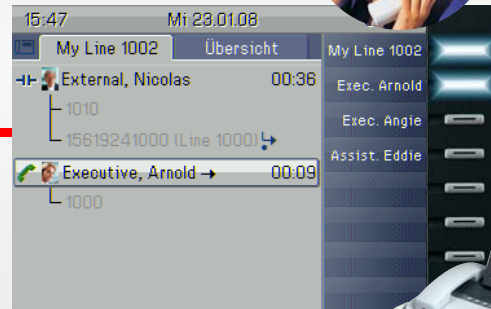
Mr. Arnold, Mr. Nicolas would like to speak to you. Should I put him through?



Executive's phone Arnold

Flashes fast
Lights up

Call is connected



Assistant's phone Claudia

Flashes fast
Lights up

5

Hello Mr. Nicolas!

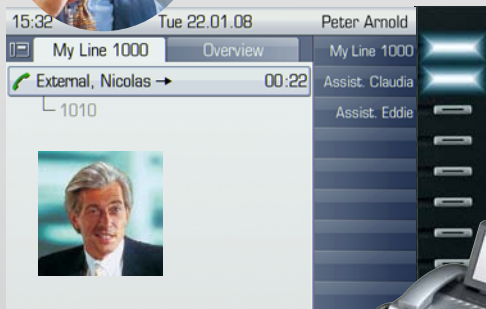


Call is connected



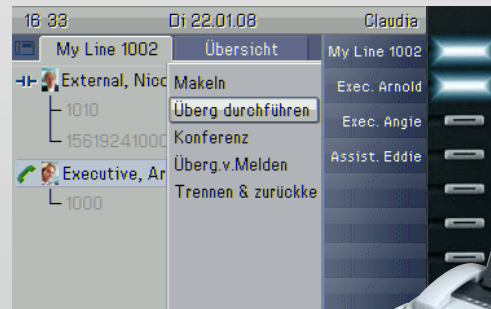
Hello Mr. Arnold, thanks for your quotation ...

Assistant Claudia transfers the call to Mr. Arnold by hanging up her handset. Mr. Nicolas is now connected to Mr. Arnold.



Executive's phone Arnold

Flashes fast
Lights up



Assistant's phone Claudia

Flashes fast
Lights up