

Executive Insight

Executive Insight brings telephony integration into Microsoft® Outlook®. What is the first thing you do in the morning when you get to your desk? Most of us open Microsoft Outlook, and now you don't have to open another thing. Your email, voice messages and phone calls are unified in the Microsoft Outlook application. Call your contacts using your mouse and manage your voice messages over your PC speaker. You'll have full visual status of everyone in the office via NEC's UC for Business (UCB)'s famous Presence buttons. Communications management is no further away than your fingertips.



Introduction

For today's executive, communication is incontestably at the top of the list of office requirements. It has to be both easy and efficient.

Executive Insight allows Microsoft® Outlook users to manage all their communications from the one application. Users can instantly identify incoming calls, view all historical calls to and from their phone, call other contacts (including Microsoft® Outlook contacts) quickly and easily, and check and process all their messages

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Introduction

Business Drivers

- Users now have a single application to administer all their communications¹
- Reduce confusion and interruptions by providing your users with the ability to handle all communications quickly and knowledgeably
- Streamline your operation with functionality such as Presence and one-touch dialing
- Prevent costly (and time-consuming) dialing errors with Microsoft® Outlook Contact integration and UCB's Phonebook
- Feel confident that your staff can offer your callers and customers premium service using screen pops with caller details and notes as well as expert customer service using Executive Insight's intuitive call handling
- No more phone-tag, or other time-wasting methods of getting in touch... Presence notification guarantees contact with colleagues the instant they are available
- Executive Insight is easy to use and always right there, inside your familiar Microsoft® Outlook environment
- While they effortlessly improve their performance, your staff will have a buzz using Executive Insight's attractive look and feel, and very cool features!

Overview

How does Executive Insight work?

Executive Insight is a plug-in loaded by Microsoft® Outlook when it starts up². This plug-in connects to the CTI Server, and Executive Insight uses this connection to drive the toolbars and views that it embeds into Microsoft® Outlook. In this way

¹ Integrate Unified Messaging with Executive Insight to receive voice messages and faxes in email format in Microsoft Outlook.

² Users can also choose to load the plug-in manually. This means they can ignore the load option when running remotely.

telephony functionality is added to Microsoft® Outlook. The functionality added can be summarized in three main areas;

1. Presence and Call Screens

A new folder has been inserted into the folder list called 'Phone'. This folder uses an ActiveX control to display the Presence pages and the Calls screen within the main Microsoft® Outlook viewing area. The folder is automatically created on start up. (See below for details)

2. Phone Control

Microsoft® Outlook toolbars have been added to the main Microsoft® Outlook Explorer to give the global access to all the CTI functionality. The buttons on the toolbars are dynamically updated, changing both their appearance and functionality, dependent on situation to provide a compact intuitive user experience.

Line toggle buttons have been added to the main menu at the top of the Microsoft® Outlook Screen to allow you to switch between lines in situations where users have more than one line.

You can configure your phone control using a new menu item Phone held in the Tools menu. Dial from contacts has also been implemented using a local toolbar on the Contact Inspector window.

3. Voice Messaging control

A Microsoft® Outlook toolbar has been added to the main Microsoft® Outlook Explorer to give global access to Voice Messaging functionality. As with the other toolbars, the buttons are dynamic, immediately showing messages waiting, their importance etc. A user's Voice Messaging can also be configured via this toolbar.

What is new for Microsoft® Outlook users?

Wherever you are in Microsoft® Outlook, you can control your calls. From the user's point of view, Executive Insight functionality displays in 3 key areas:

1 Users access Executive Insight functionality by clicking their telephone Extension button in the main Microsoft® Outlook toolbar.

2 Three toolbars are consistently accessible from any Microsoft® Outlook view: Telephony, Voice Messaging and the quick dialing 'Speedbar'

3 Calls view is split into 2 panes: Call history of all inbound and outbound calls

4 Current call screen pop providing caller details and functionality options.

5 Presence view provides one-touch information and Presence status of all internal users

Conferences view gives users the tools to set up and participate in instant and scheduled conferences

Chat view allows users to make and receive desk-to-desk chats from other Desktop, Insight or Console users

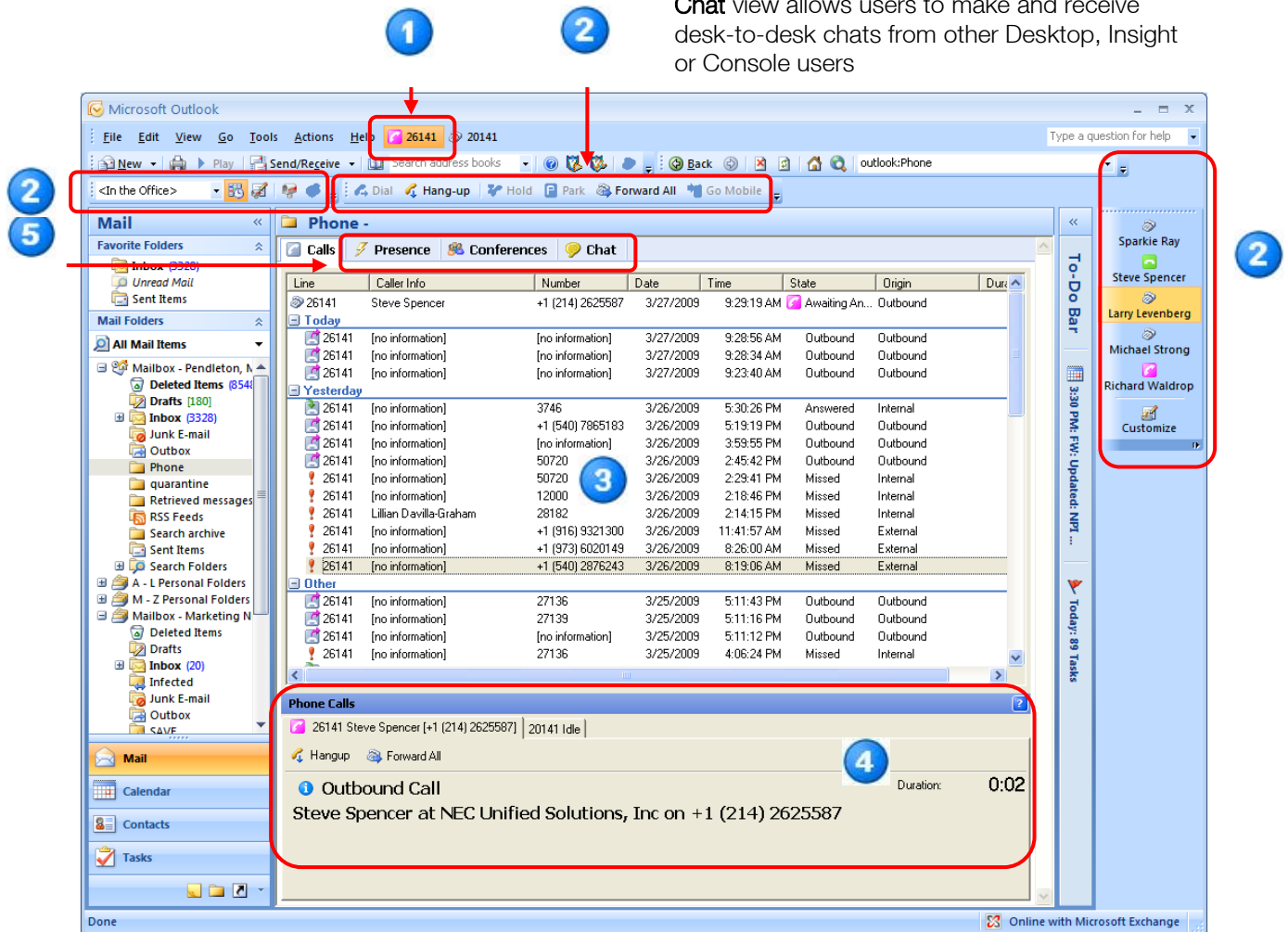


Figure 1. Microsoft® Outlook with Executive Insight telephony plug-in

Core Features and Benefits

Features

Executive Insight is the UCB telephony integration with Microsoft® Outlook.

- Executive Insight functionality is easily installed at the client PC with the UCB installer wizard.
- After installation, a new Telephony toolbar is available to facilitate phone call management.
- The Voice Messaging toolbar gives full control of their messages and Voice mailbox.
- The Speed Toolbar buttons are accessible from any Outlook view, and also display extension status when configured for internal contacts.
- The Executive Insight Calls page, with its familiar Outlook XP look-and-feel, allows users to filter and view call history dynamically, according to their personal preference.
- From the Calls page you can also view and manage the active or current call, with all options instantly and visibly available.
- The Presence page provides one-touch dialing of both internal and external contacts.
- Internal Presence buttons provide Phone status and Mailbox status.
- Choose from several Presence button layouts for the view that suits best.
- Executive Insight pops a transparent alert item for an incoming call.
- Clicking a hotspot on the screen pop redirects the call immediately to Voice Messaging.
- Customize specific Executive Insight operations according to your personal preferences.
- Executive Insight can load instantly on Microsoft® Outlook startup, or can be loaded independently, to accommodate staff who may not always need to use telephony integration, for example remote users.
- Choose to dial directly from Microsoft® Outlook contacts or integrate contacts into the UCB

Phonebook to provide dialing status monitoring via Executive Insight.

- Each time you set up an appointment in Microsoft Calendar, Executive Insight integration provides a custom drop down box inside the appointment form to let you select the Presence Profile you want to activate at the time this appointment takes effect.
- Set appointments to automatically switch your Presence Profile back to available, or you can change them manually when you return.
- Users can initiate or schedule a conference call for up to 64 parties – either before a call begins or during a conversation.
- Executive Insight users can initiate chat conversations with internal or external contacts using UCB's integration with Microsoft® Windows Messenger and Skype™, or the inbuilt desk-to-desk chat available inside Desktop, Console or Executive Insight for internal conversations.

Benefit^s

Executive Insight offers some unique benefits:

- Quick and intuitive Client side installation reduces the administration and installation overhead.
- With a Telephony toolbar to facilitate phone management, including a dynamic Transfer button, users need no longer fear call handling. The old question “How do I transfer a call again?” is at last a thing of the past!
- Dynamic call control options available for the current call allow users to confidently use advanced functionality such as Conferencing and Record Conversation.
- There is no Voice Messaging number to dial; users simply click a button in their Voice Messaging toolbar to listen to their messages.
- Voice mailbox maintenance is FUN! Users follow the simple wizards in the GUI to configure their mailbox to suit both their callers and themselves.
- Users can easily sift through their call history, using the flexible filter to search for the types of call they are concerned with, e.g., all today's, or just the missed calls.

- Whatever activity the user is engaged in, the Speed Toolbar is accessible immediately, or at a single click.
- Users simply click a button to call either internal or external contacts from the Executive Insight Presence pages. When a number changes, it's done centrally and everyone's Presence pages are automatically updated.
- No more ringing and waiting for answer. A quick glance at the screen tells callers if the person they want is busy, or even if they are there at all. They can click a button and send them a quick voice message -- and they can see when they get it.
- Executive Insight's viewing options include a "cards" view modeled on the Microsoft® Outlook Contacts layout.
- Also familiar to Microsoft® Outlook XP users is Executive Insight's alert item for the incoming call providing instant caller notification³ and call handling options.
- Users have the flexibility to configure the way they want their own Microsoft® Outlook application to accommodate telephony, giving them the maximum benefit from all their additional functionality.
- The extra load of telephony functionality on Microsoft® Outlook can seem tedious to new users, but there's no need to run it until or unless it's required. Users can run Microsoft® Outlook as standard when they run it remotely, and load telephony only when they're in the office.
- Communication with your contacts is always up-to-date. Integration with Microsoft® Outlook Contacts provides maximum operability with Microsoft® Outlook.
- You'll always keep your callers informed. Executive Insight allows seamless matching of up to 99 Voice Messaging Profiles with any Calendar appointment, so that as soon as the user sets an appointment, the Presence greeting for that duration is automatically set too.
- Give your enterprise the opportunity to provide first call resolution to all your customers, even without a contact center. Executive Insight users can instantly consult with anyone inside or outside the company to find the solution that's required. UCB's security options mean you control your staff's level of access to external or internal chat from Executive Insight.

³ When Calling Line Identification is available

Architecture Overview

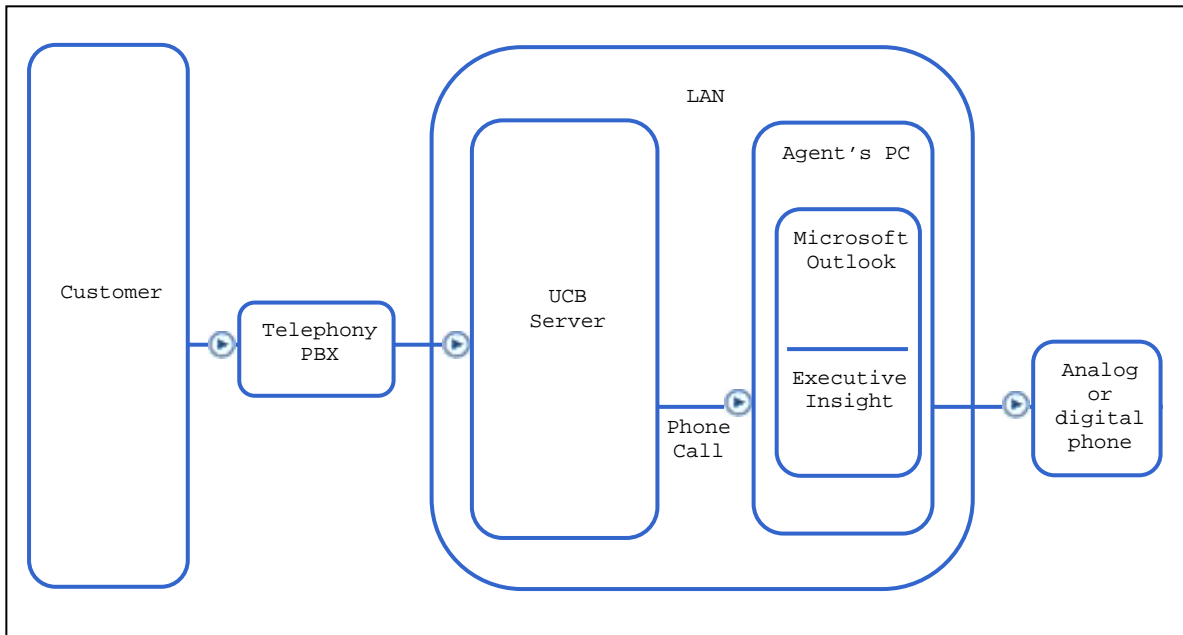


Figure 2. Executive Insight Architecture

Detailed Features

Main Toolbars

Executive Insight users have a combination of telephony and Voice Messaging functionality literally at their fingertips.

Users will acquire 3 new toolbars to help them manage phone calls and Voice Messaging.

- Toolbars can be shown or hidden as desired (standard toolbar functionality)
- All 3 toolbars are always visible in Microsoft® Outlook, no matter which view is displayed, for example, Mail, Contacts and Calendar.
- The dynamic buttons in the toolbars alter functionality according to the state of the phone or the current call.

- Users simply mouse over the toolbar to display tool tip describing the functionality for each button.

The Telephony Toolbar allows users to...

- Make, Transfer or Hang up calls.
- Hold or Park calls (once the call is held or parked, the button changes and the user simply clicks to retrieve the call)
- Forward (divert) their phone to another number, for example to Voice Messaging, or to their mobile phone.

Using the Voice Messaging toolbar, users can...

- View their mailbox message status.
- Check their Voice Messaging messages.
- Change their Voice Messaging Profile⁴.

⁴ Please refer to the Voice Messaging Whitepaper for a full description of all Voice Messaging functionality

- Set ETR (Estimated Time of Return).
- Activate or de-activate their Profile schedule.
- Manage the configuration of their mailbox.
- Redirect a phone or fax⁵ call to their mailbox.

Users can configure their most frequent contacts to appear on the Speed Toolbar

- Users can display up to 25 buttons depending on the screen resolution and the size of their PC monitor.
- User clicks the button to display a list of available numbers to choose from.

Phonebook

- The Phonebook is UCB's online database directory.
- The Phonebook can be administered centrally or by individual administrators.
- Phonebook is controlled by Security, so both viewing and administrative access can be restricted as required.
- Contacts can be added centrally to a global Phonebook and accessed site-wide.
- Phonebook can be integrated with LDAP and Active Directory to allow remote directories to be accessed for dialing via Executive Insight. These directories can be imported into Phonebook for direct editing.
- Microsoft® Outlook Contacts can be integrated into Phonebook for viewing/dialing access, or can be downloaded for editing.
- Users can add contacts to their personal Phonebook as well as using (depending on Security permissions) the global Phonebook.

Presence

UCB's much admired Presence functionality provides a range of features to assist the user in managing their telecommunications.

⁵ Where the user is also licensed for Fax Messaging

- Users can create their own Presence pages or can access central pages maintained by the administrator, depending on security permissions.
- Pages have a number of different layouts to choose from, including a Microsoft® Outlook style "cards" view.
- Presence buttons are configured from the Phonebook, using centrally maintained contact details. When a number is changed, all the global Presence buttons automatically update.
- Users can one-touch dial the default (most commonly called) number for each contact, and drop down a list for all other numbers, for the same contact, for two-touch dialing.
- For regularly called numbers, a separate Presence button can be created for each of a contact's phone numbers, so each number can be separately one-touch dialed.
- In addition to quick-dialing contacts, users can right-click a Presence button for a variety of other functions, such as leaving a Voice message, sending a text message to a display phone⁶, changing another user's Profile⁷ and automatically paging the user when there is a caller on hold for them.
- Dynamic Phone status is displayed on internal Presence buttons. Phones can be idle, busy or ringing.
- Internal buttons also show the type of call each user is engaged on, e.g., inbound, outbound or queue⁸ call.
- Profile status displays on the button of each internal Voice Messaging user. Users quickly recognize the Profile icons to show users are In the Office, In a Meeting, On Vacation etc.
- The number of New or Urgent messages displays for each internal Voice Messaging user and Fax indication may also be available⁹. Operators and assistants may benefit from being able to tell that someone is back in contact with the office when

⁶ Platform-specific

⁷ Dependent on security permissions

⁸ When integrated with queuing modules

⁹ When integrated with Fax Messaging.

they see they've accessed all their voice messages.

- Internal buttons show the Call forward status of a user's extension, e.g., to Voice Messaging or another extension number, or an external number such as their cell phone.

Calls page

The Executive Insight Calls tab page, with its familiar Microsoft® Outlook XP look-and-feel layout, allows users to manage both their current call and their call history.

- Users can manage the active or current call, using such standard functionality such as Transfer, Hold or Park.
- Buttons or right-click options in the Calls page also provide access to more advanced functions such as Conference, or Recording the current conversation to their Voice mailbox.
- Mid-call, a user can use "Cancel" to abandon a transfer attempt and return to the caller, or even to "swap" parties in order to shuttle from one person to another when consulting.
- Users can filter and view call history by contact, date/time (Today, Yesterday, Other), state (e.g., Missed or Answered calls) or origin (internal, external or outbound). This allows them to keep record of specific calls while deleting all the records they don't require.

Preferences

Executive Insight Preferences allow the user to configure Microsoft® Outlook according to their personal requirements.

- Preferences are accessed from the main Microsoft® Outlook Tools menu, using the Phone option on the side-menu.
- Users can change their extension line (for example if they wish to change desks), set or hide the phone call alert screen pop and choose which page to display when they pop Executive Insight. They can also adjust a timer, so that calls parked at their own phone always ring back after an acceptable wait time.

For administration of call initiation, users can specify the Phonebook Search order (first or last name),

select additional Presence pages to display (e.g., global pages, or even a personal page from another user), and choose to integrate their Phonebook with Microsoft® Outlook Contacts.

- An important setting for some users is the ability to choose whether they want to load Executive Insight automatically on starting up Microsoft® Outlook, or to manually load at their discretion. Some users prefer to start telephony separately to Microsoft® Outlook, e.g., once they are ready to use the phone. This is particularly relevant for users who occasionally access Microsoft® Outlook at a site remote from their phone location. When the Preference flag is set to load manually, users can click the Connect button any time that Microsoft® Outlook is open, in order to start up telephony.

Expected Time of Return

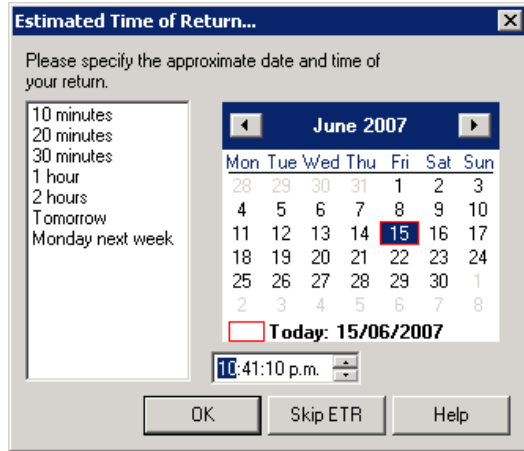


Figure 3. Specify the time you plan to return

User's pre-recorded Presence Profile greeting for when they are in a meeting: Followed by...	Hi, you have reached Jo Brown at ABC Company. I'm currently in a meeting.
System Generated ETR (Expected Time of Return) information:	<Jo Brown> is due back today at 5.15pm. To speak with the Operator press zero, or stay on the line to leave a message.

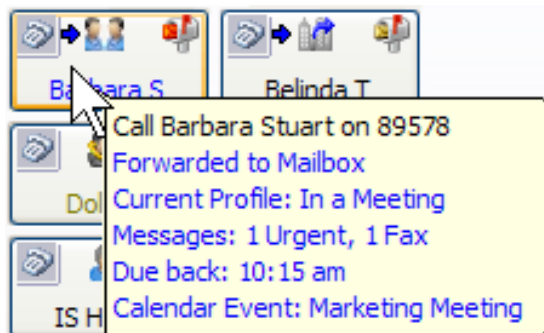


Figure 4. Other users can see your ETR by hovering over your presence button

Instant Messaging Integration

Available in Desktop and Executive Insight, UCB IM integration enables...

- Visibility of IM online status of external users inside UCB
- UCB/IM Presence integration
- Initiation of Outbound Calling/Chat

Visibility of IM status

UCB's IM integration extends Presence to provide visibility of your external contacts inside Desktop. Now you can see the IM status of external contacts in one application with your internal contacts

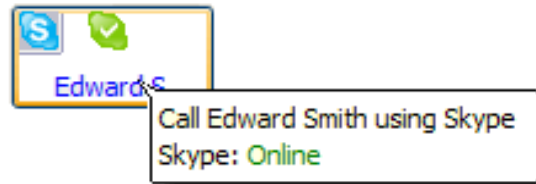


Figure 5. Skype in Presence button

UCB/IM Presence integration

UCB's IM integration extends your Rich Presence out to your external contacts as well. Your desk activity (keyboard, mouse and phone), UCB schedule and Microsoft® Outlook /Lotus Calendar drive your IM status, broadcasting your Rich Presence for the outside world to see – not just internal users.

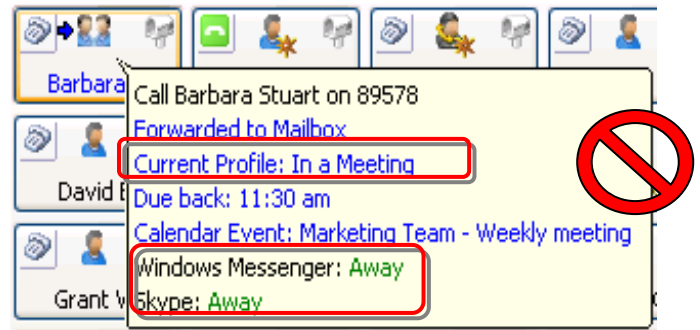


Figure 6. Instant Messaging integration with Presence - Unavailable

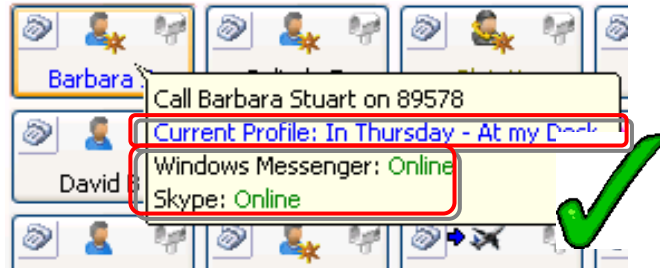


Figure 7. IM integration with Presence - Available

Initiation of Outbound Calling/Chat

Connect with your internal and external contacts using your single application's Presence buttons; choose the IM communication that suits you:

- Instant Message or Chat
- Skype to Skype voice Call
- Skype to landline/mobile etc ("Skype out")

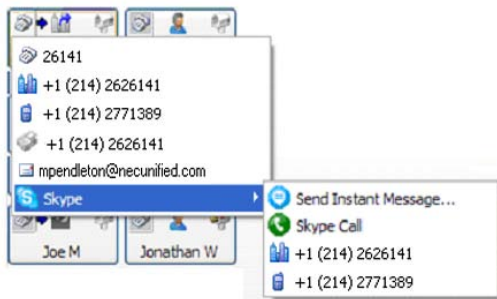


Figure 8. Initiating an Instant Messenger contact

The relevant IM application pops to the front and you can conduct your conversation.

Desk-to-desk Chat

You can initiate and receive an internal Chat to exchange text information with someone inside your organization who is also set up to use Chat. This is a useful way to exchange complicated information quickly, in real time, with a record that's available for you to save. A user's security privileges control whether Chat is available to them.

Features

- Quickly exchange information with another user inside your organization
- Conduct multiple chat conversations at the same time

- A user can conduct a chat conversation at the same time as a phone call within the same application
- Easily swap between separate conversations by clicking on the appropriate conversation tab
- When a chat user receives a new chat call they can have a toaster pop and audio to alert them
- Executive Insight can also play an audible notification when a new chat comment is received if it is not currently active on the screen
- Print, copy or save a chat call transcript
- Identify when the other party is typing information
- Copy and paste information into the chat call
- A Chat call can be transferred to another user by clicking the Transfer button which produces a list of available users to transfer to. The transferring user can also cancel the transfer if they choose
- Send a web page to the chat call recipient
- Create a list of standard phrases that you can use easily within your conversations

Benefits

- Information is real-time enabling users to enhance complex information easily
- The ability to conduct a chat conversation at the same time as a phone call means a user can quickly ask for assistance during their phone call
- Users can access a saved chat transcript at any time
- Standard phrases enable users to save frequently used information to save time

When a chat call is transferred to another chat user all previous transcript information follows with the call enabling the new user to view the history of the chat conversation and handle the call more efficiently

Examples

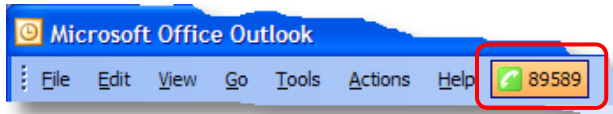
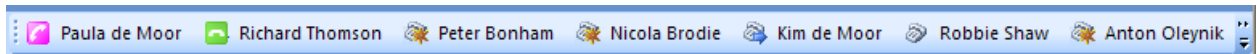


Figure 9. Access telephony functionality from the front Microsoft® Outlook screen by clicking the UCB Extension line button displayed in the Microsoft® Outlook menu bar

- 1 Speed toolbar – Visible at all times, this toolbar displays a combination of icons, tooltip and menu options providing Presence. The Speed toolbar can be dragged to horizontal or vertical position in the main Microsoft® Outlook screen
- 2 Telephony toolbar – standard telephony functions are dynamically available
- 3 Voice Messaging toolbar – Adjust Presence Profile; Set schedule; view/access mailbox; redirect and retrieve messages



1		Extension is idle or unmonitored by the CTI Server.
		Extension is idle, and the user is currently at their desk.
		Extension is forwarded to Voice Messaging or to another extension.
		The user is currently handling an inbound non-queue call on their extension.
		The user is currently handling an outbound non-queue call on their extension.
		The user is currently handling an inbound queue call on their extension.
		The user is currently handling an outbound queue call on their extension.

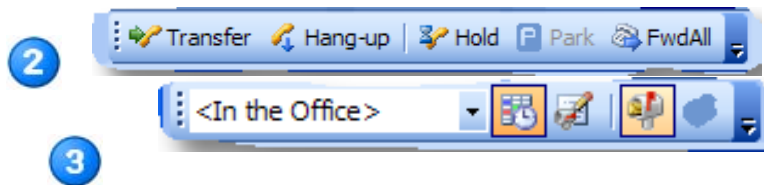


Figure 10. Toolbar functionality

- 1 Users can display their Presence buttons in a layout to suit them: List view, Details view, Large (shown below) or Small button view.
- 2 Microsoft® Outlook users will be familiar with the “card” view for displaying Presence.

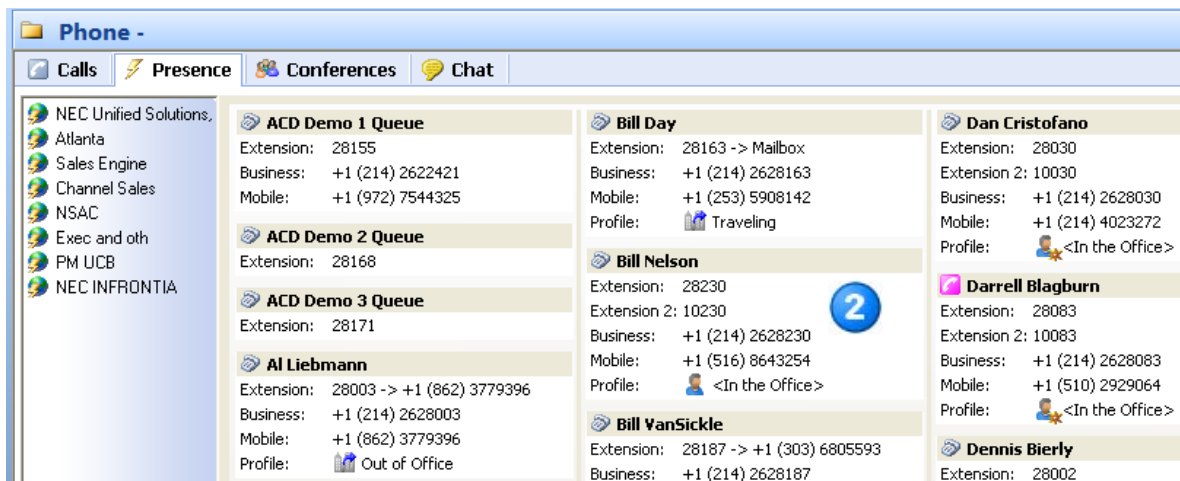
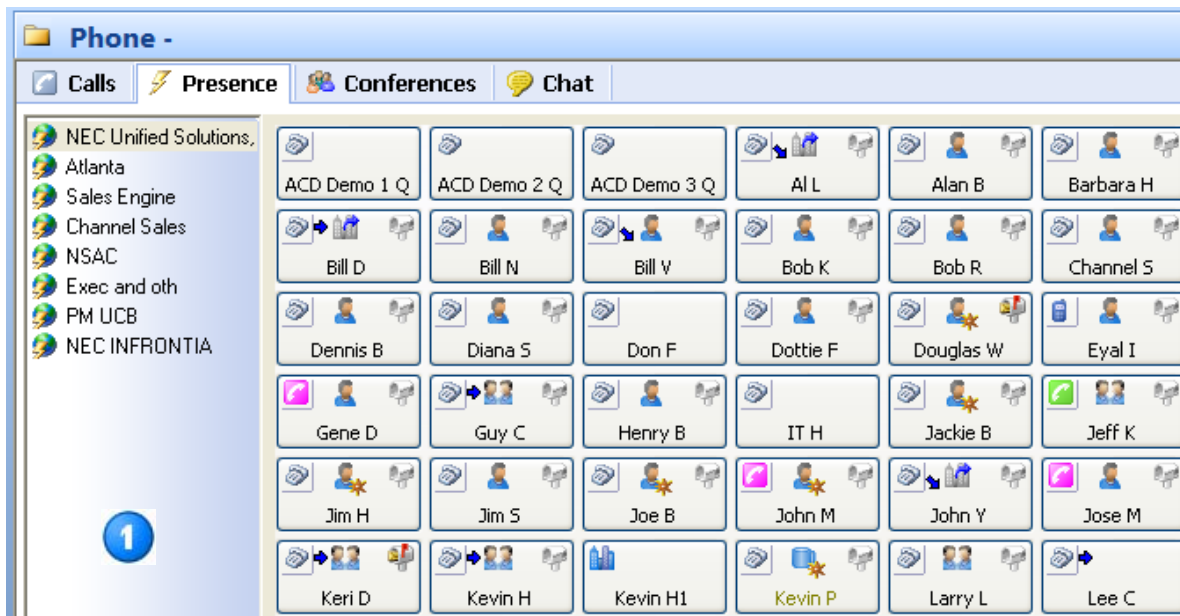


Figure 11. Presence

- 1 Microsoft® Outlook style tree list view allows expanding and condensing to make easier viewing and management
- 2 These functions are available by right clicking on your currently connected call

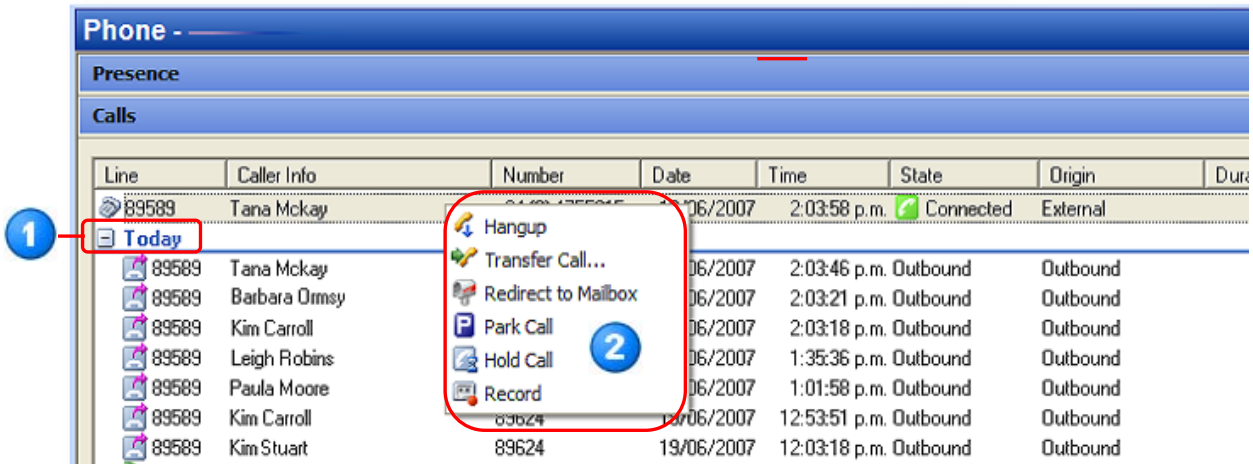


Figure 12. Calls view Call History

- 1 Phone calls screen, on the same page as the Calls view contains standard Desktop options and details for managing calls

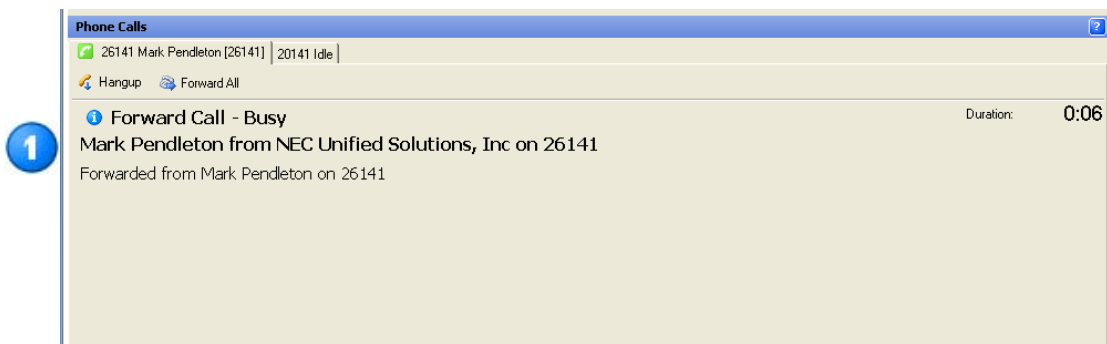


Figure 13. Phone Calls tab page

- 1 A semi-transparent “toaster pop” pops when a new call arrives, allowing the user to answer the call, display Executive Insight with call details or redirect the call immediately to their mailbox. If the call has gone to voice messaging, the toaster pop offers the chance to retrieve the call

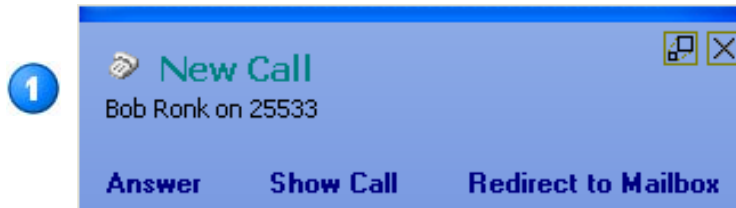


Figure 14. New Phone call Alert screen pop

- 1 Drop the Profile list down to match your appointment with any one of the Presence Profiles you've configured in your Mailbox.
- 2 The appointment availability or “Show time as” field must be Busy; the Profile toolbar is disabled when the availability is changed from Busy.

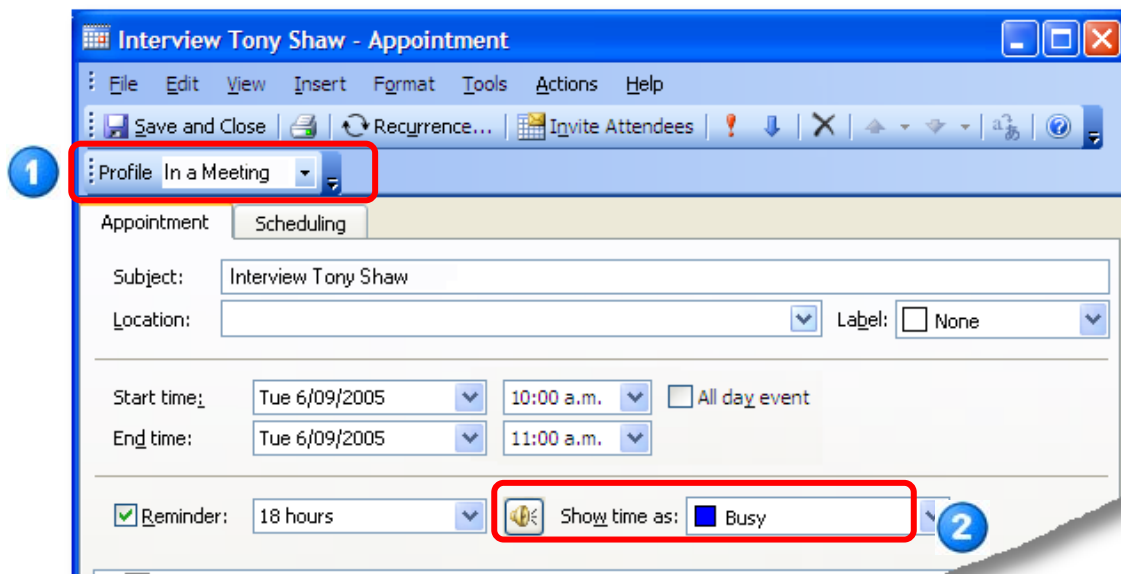


Figure 15. Select Voice Messaging Profile from Microsoft Outlook Calendar appointment

User availability information

“Presence” is detected from Mouse, Keyboard or Phone activity for other users. Presence detection is only available for users that have Voice Messaging.

- View the availability or Presence of other Desktop users
- View at a glance presence icon information – At My Desk / Away from My Desk
- Tooltip information - Current Presence profile with presence information
- Presence Notification to notify you when other internal contacts become available
- Microsoft® Outlook Calendar information display on Presence button¹⁰
- Toaster popups to remind you to change your profile when you get back to your desk

Example – Presence Information

After a pre-defined period, e.g., 10 minutes, if the user is absent, or does not use equipment, the icon and tooltip automatically change. Presence is designed to be internal only, i.e., the forwarding and greeting do not change.

1. Whichever icon is used for the Profile is automatically overlaid by either the star (present) or clock (absent)
2. When a Presence Profile is active, users are... “At my desk” / “Away from my desk” OR not operating Presence or their Desktop is closed

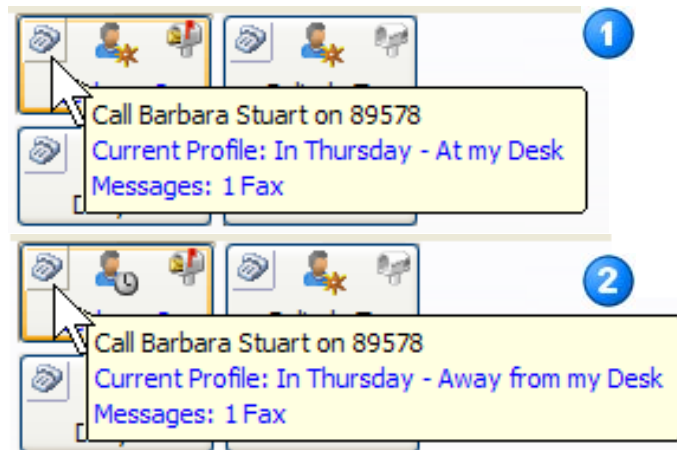


Figure 16. Presence information

Example – Presence Notification

1. You can set callback notification from Presence buttons to notify you when a busy extension becomes available or the person is back
2. As soon as the contact is “Present”, you get a toaster pop option to call the extension. If you set multiple notifications, you will get multiple toaster pops in succession as you close each one

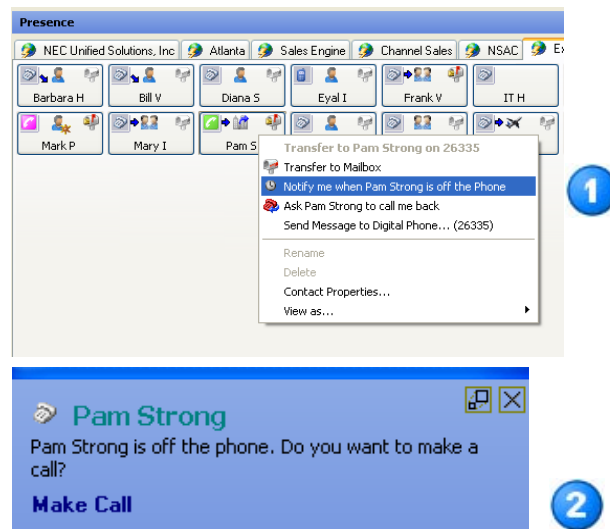


Figure 17. Request notification of Presence

¹⁰ A Unified Messaging license is required for this feature

Example – Microsoft® Outlook Calendar Appointment display

- 1 Select the Presence Profile to be used for scheduled calendar appointments
- 2 Choose the name for your appointment – this will be displayed in the Presence page for all other users to see unless you choose to make the appointment “Private”
- 3 When an appointment is created from within Microsoft® Outlook Calendar that has “Show time as: Busy” selected, Voice Messaging automatically activates the Calendar Events Profile specified and plays/displays the ETR.

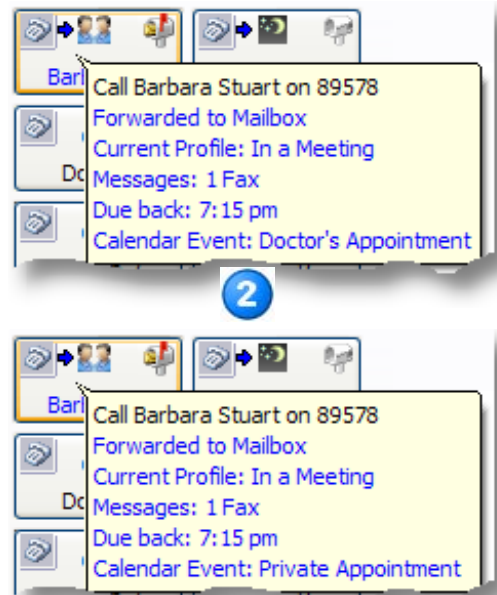


Figure 19. Calendar Event Displayed (left) and Private Appointment (right)

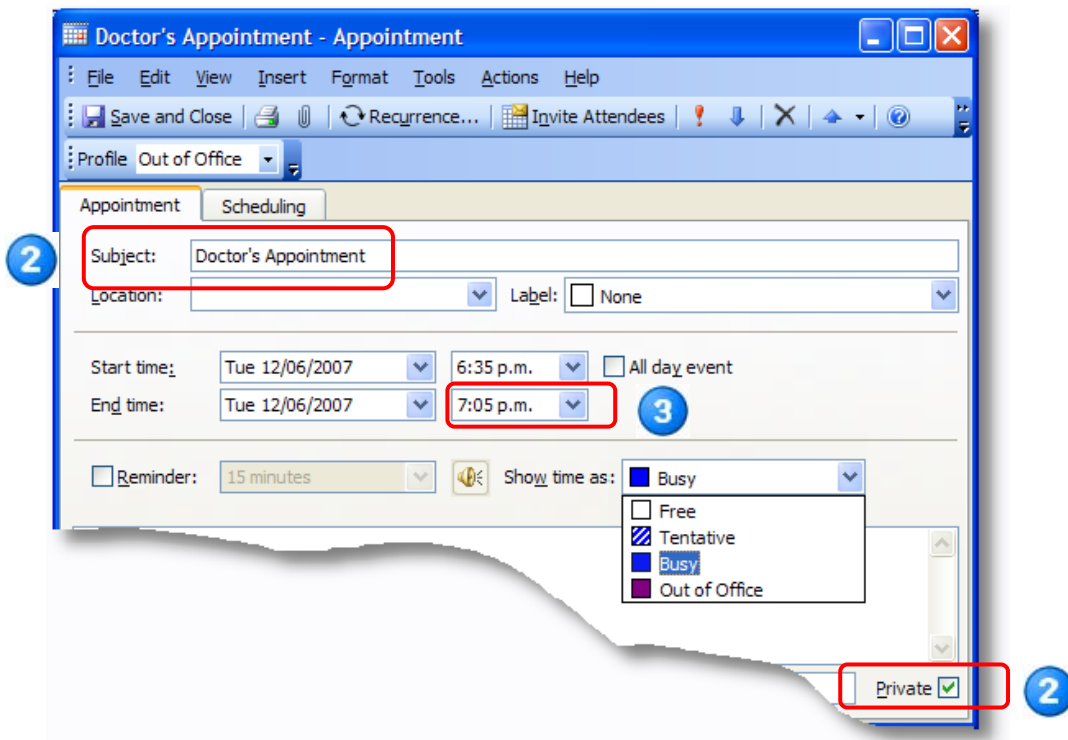


Figure 18. Integration with Microsoft® Outlook Calendar

Example – Reply to Email via the Phone

Executive Insight users of Unified Messaging¹¹ can reply to Email via the phone

- 1 Select the email and click the **Reply** button in the standard Email toolbar to call the default telephone number for that contact
- 2 You may also click the drop-down arrow to display the complete list of numbers to call for that contact

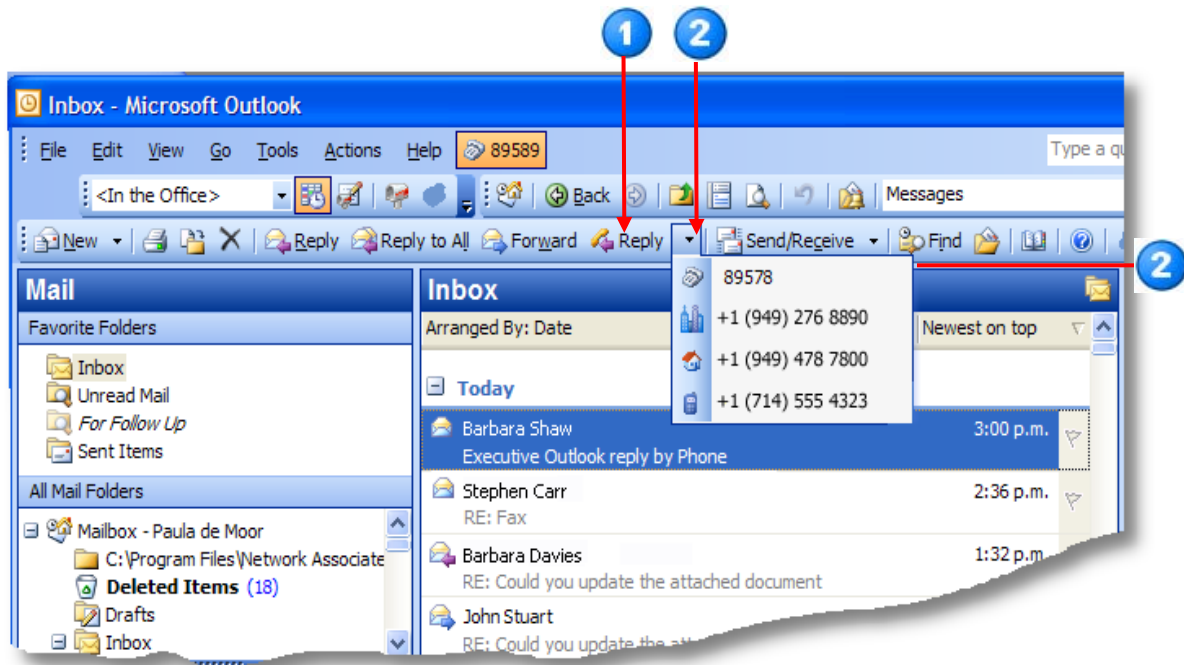


Figure 20. Reply to an email via the phone

¹¹ This feature requires a Unified Messaging license

Example – Voice Messaging and Fax in Executive Insight Calls Pane

- Executive Insight users can view, print, and maintain their fax messages and play, forward, and maintain their voice messaging directly from the Calls pane of Microsoft® Outlook

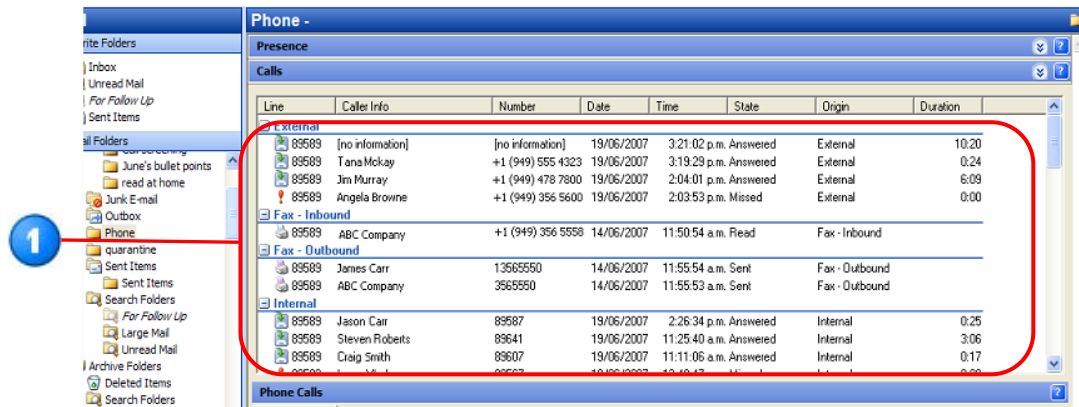


Figure 21. Executive Insight users can play messages and view both inbound and outbound faxes

- Depending on media type and whether the caller is recognized by the Phonebook or not, different right click options are offered

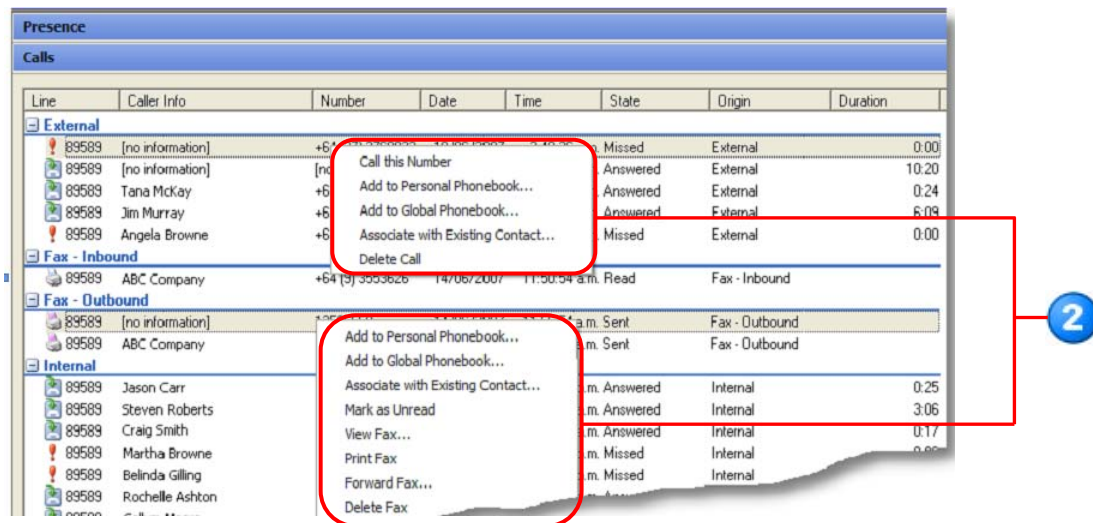


Figure 22. Right click for options

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