USER
MANUAL

# DESKTOP APPLICATIONS

## Version 6.0

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# Contents

# 1 Introduction

This manual describes the key features common for all Zylinc desktop applications. Features covered in this manual include searching for a colleague, viewing calendar entries, and sending messages.

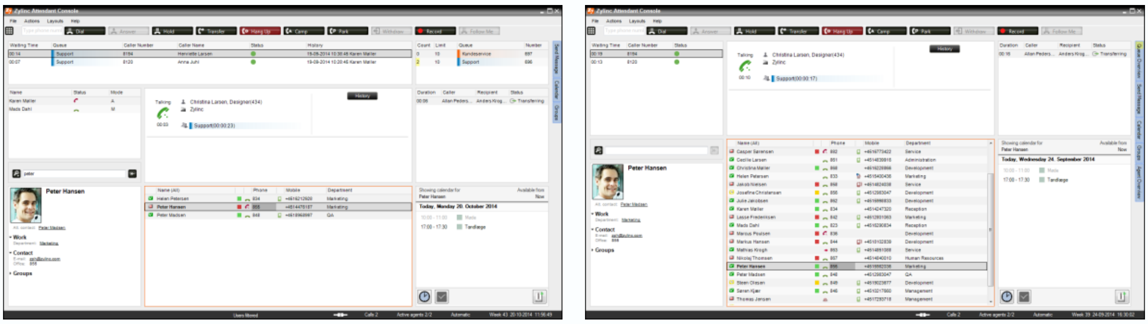
Each application's unique features, such as call handling, are not described in this manual. Instead, refer to the user manual **addition** for the application in question.

This manual applies to the following applications:
- Zylinc Operator
- Zylinc Attendant Console
- Zylinc Contact Center
- Zylinc Service Center

**Please note: The manual may differ from your application.**
There may be differences between this manual and your application. This might be the case if you are using another version than documented here (version 6.0) or if your administrator has disabled features or components. This manual is subject to change without notice and may contain technical inaccuracies or typographical errors.

## 1.1 User Interface of the Zylinc Applications

The user interface of the Zylinc desktop applications consists of a number of components, each with its own purpose. You will find components showing users' calendar entries, the users of the system and groups. The components can be placed and customized to each user's individual needs and even hidden if required. For this reason, the focus of the manual will be the components' features and content. Their position in the user interface will not be covered, as the position may vary.



*Example showing the diversity of the user interface. The two images show two different arrangements of the components in Zylinc Attendant Console.*

# 2 The Application

## 2.1 General Structure

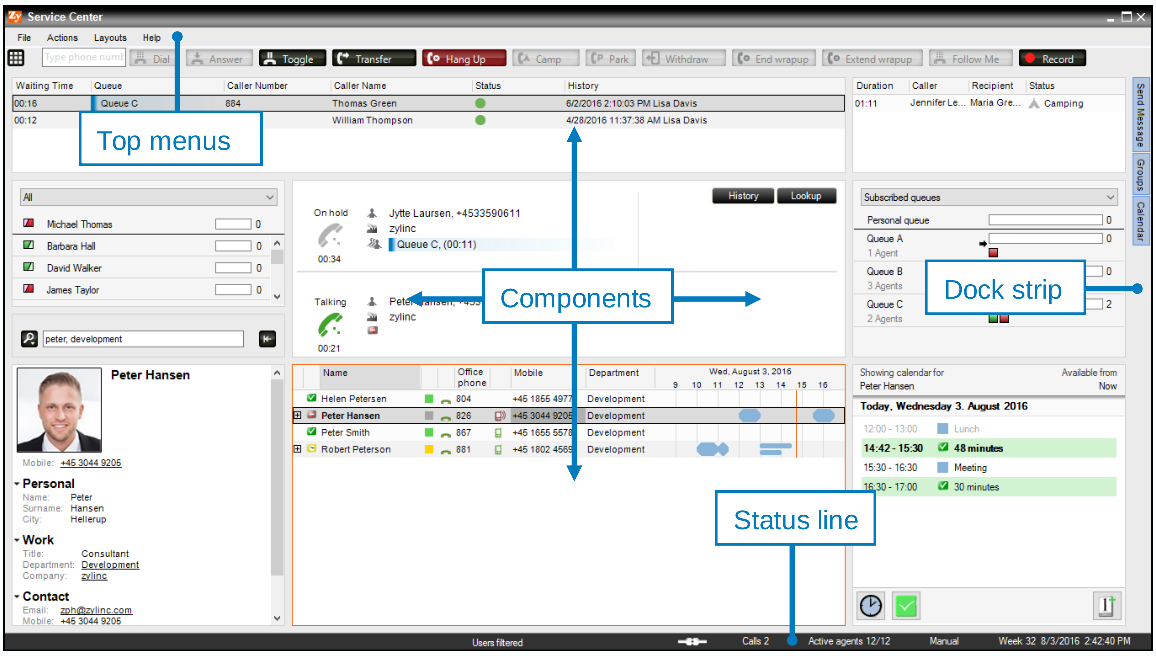
Zylinc desktop applications consist of:

**Top menus** Provide access to features that are normally hidden, e.g. open the settings window or view shortcuts.

**Components** The components located in the middle of the window are your primary way of interacting with the application. A component may for example contain a calendar or a list of users.

**Dock strips** Dock strips can be found on the left, right, or lower edge of the application window. Here you can access other components than those permanently shown in the window.

**Status line** Depending on the application, the status line can for example show your status or number of calls waiting to be answered. You can check your connection status by double-clicking the icon with the two wires (see section 9.7).



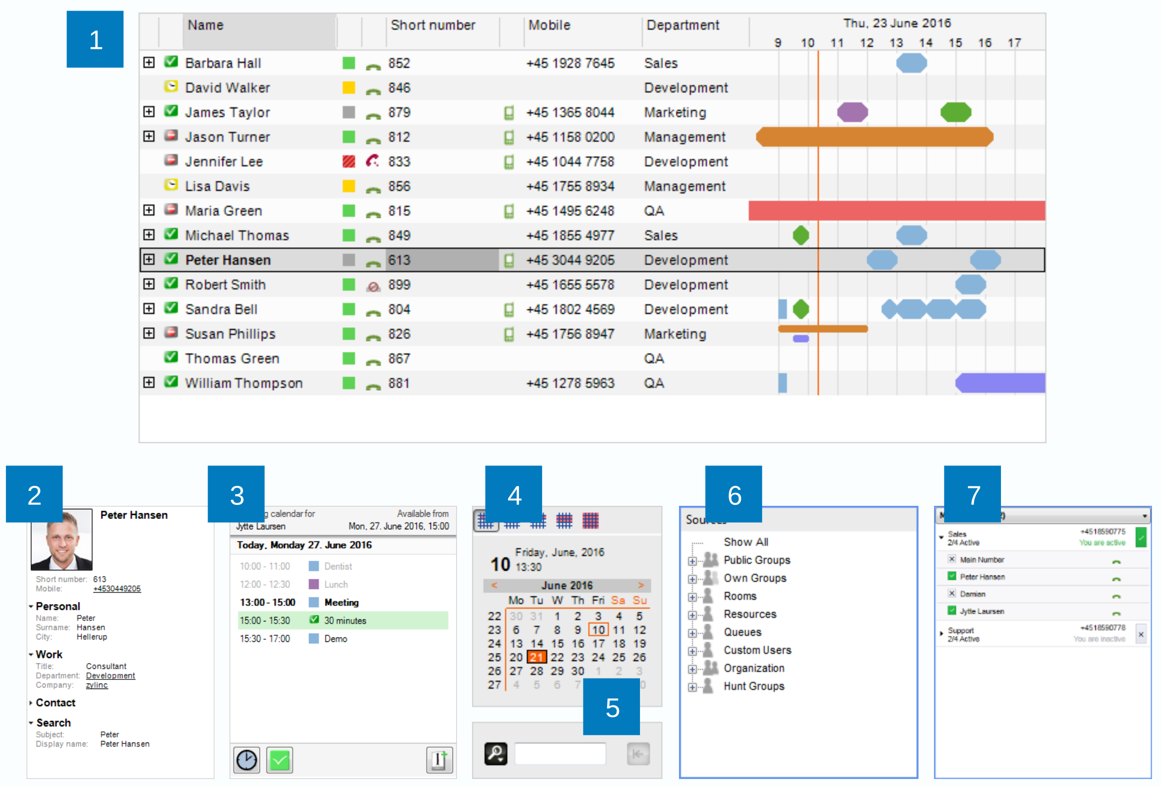

*(Image of Zylinc Service Center)*
*The four elements found in all Zylinc desktop applications.*

## 2.2 Components

One of the most important components in the Zylinc desktop applications is the **Time component**, which shows a list of all users in your system. The users visible in the Time component depend on whether you have selected a group in the **Groups** component and whether you have typed something in the **search field**. For each user you can see user information and appointments. You can change which days you want to see in the calendar overview by using the **Calendar**.

When you choose a user in the Time component, you can see detailed information about this user in **User Details**. The component **Calendar Details** shows all the user's appointments.

| Component | Description | For more |
|---|---|---|
| 1) Time | Users in your system. | Chapter 4 |
| 2) User Details | Additional information about a user highlighted in the Time component. | Section 5.1 |
| 3) Calendar Details | Appointments for a user highlighted in the Time component. | Section 5.2 |
| 4) Calendar | Choose which dates to show in the calendar overview of the Time component and in Calendar Details. | Section 5.3 |
| 5) Search field | Show only the users in the Time component who match your search. | Chapter 6 |
| 6) Groups | Only show members of a chosen group in the Time component or edit custom groups. | Chapter 7 |
| 7) Hunt Groups | This component is only accessible if the company uses BroadWorks. If available, it contains your hunt groups and their users. | Chapter 8 |




*The seven components covered in this manual: 1) Time, 2) User Details, 3) Calendar Details, 4) Calendar, 5) Search field, 6) Groups and 7) Hunt Groups.*

## 2.3 Additional Application Features

Apart from components, Zylinc desktop applications consist of a number of other application features like **Send Message** or **Absence**. You access most of these features from the top menus or by right-clicking a user. Please note that **Send Message** is the only feature that can be found in both the docking line and by right-clicking a user.

| Function | Description | For more |
|---|---|---|
| Send Message | Send an SMS or email. | Section 9.1 |
| Absence | Create an absence for a user. | Section 9.2 |
| Forwarding | Forward calls to a user's office phone. | Section 9.3 |
| Find Available Time | Find a time slot where a number of chosen users have time to meet. | Section 9.4 |
| Create a calendar entry | Open your email client to create a calendar entry. | Section 9.5 |
| Feedback | Send us your feedback regarding the application. | Section 9.6 |
| Connection Status | View your current connection status. | Section 9.7 |

# 3 Start-up

To get startet, all you need to do is to launch your Zylinc application and wait for it to open. It is then ready to use. The login procedure can vary slightly depending on your application settings and the number of Zylinc products you have accessible. The login procedure is described below.

## 3.1 Login Procedure

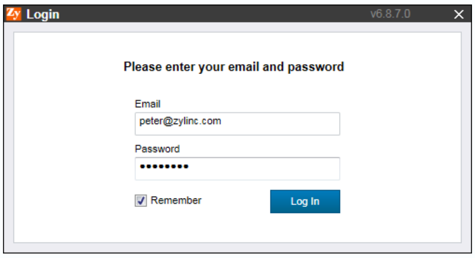
All the steps that can occur during the start-up procedure are described below, in the order they would occur.

**Please note: The login procedure can be adjusted.**
The start-up can be adjusted in **Settings,** which is usually done by your administrator when you first install the Zylinc application. For instance, the login window may always be shown. See section 11.3 for more details.

### 3.1.1 The Login Window

When you open the application, the login window will appear. Enter your email and Windows password and click **Log In.**

If you want the Zylinc application to remember your email and password, check the box **Remember**. This will let you skip the login window the next time you start the application, unless you in Settings have chosen to show the login window always. You can force the login window to appear if you press and hold the Ctrl key while you open the application (keep the key pressed until the window appears).



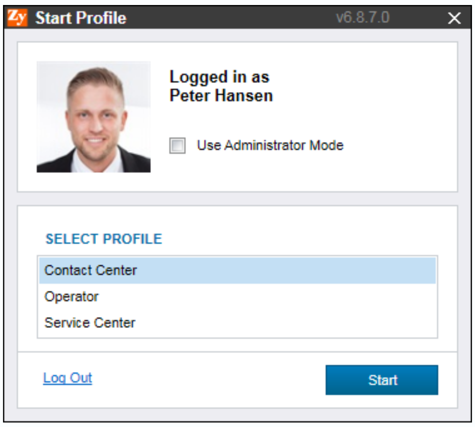

*The Login window.*

### 3.1.2 The Start Profile Window

If you have access to more than one Zylinc product, the Start Profile Window will appear after the Login window. Choose the profile that matches the product you want to use and click **Start** or double-click the profile name in the list. The application then starts and is ready to use. Ask your system administrator if you are uncertain which profile to choose.

If you have administrator rights, you can check the box **Use Administrator Mode** in the top of the window. Log in as administrator when you want to change other users' application settings. Remember to log out when you are done changing the settings. In general, it is not advised to run in Administrator Mode as changes may propagate to other users' profiles.

If you need to log in as another user, click **Log Out** in the bottom of the window to return to the Login window.




*The Start Profile window.*

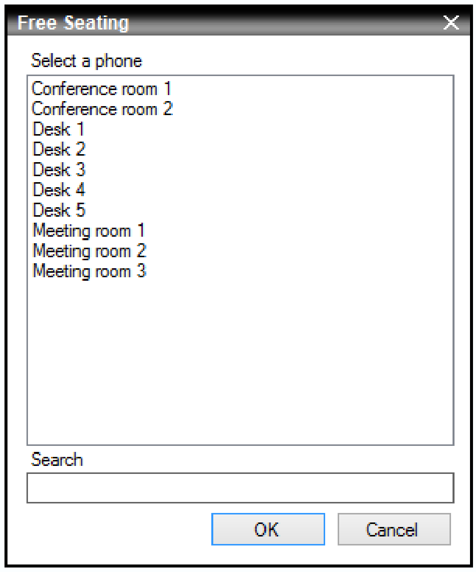
## 3.2 Free Seating

When the application has finished loading, you may be presented with the **Free Seating** option.

Without Free Seating, you always need to be seated next to your office phone. Free Seating allows you to use different phones, so you do not need to sit by the same phone every time.

When using Free Seating, you need to specify which phone you want to use. Select your phone in the window, which appears after loading the application. The search field in the bottom of the window makes it easy to find your phone, in case it is a long list of phones.

Once you have chosen a phone (or avoided choosing a phone by clicking **Cancel**), the application is ready to use.

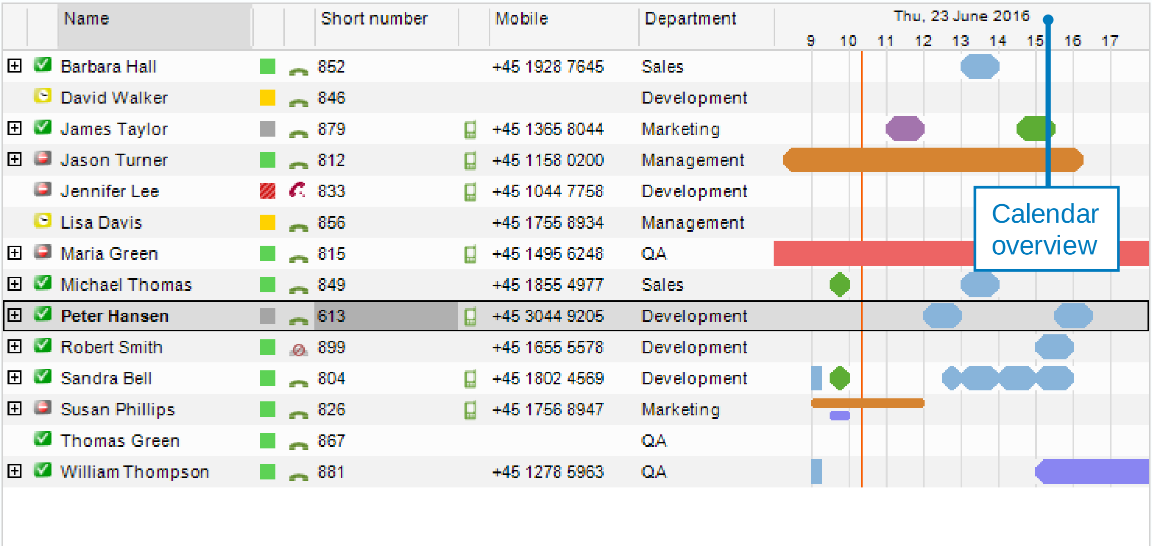



*Choose the phone you want to use.*

# 4 Time Component

The Time component contains a list of users in your system. The amount of users displayed depends on whether you are searching for someone (chapter 6) or have chosen a specific group (chapter 7). Until you start a search, the component will either be blank or show all users, depending on your setup.

Besides letting you choose users for features such as **Send Message** or **Find Available Time**, the Time component also provides information about the users, their status, and calendar.



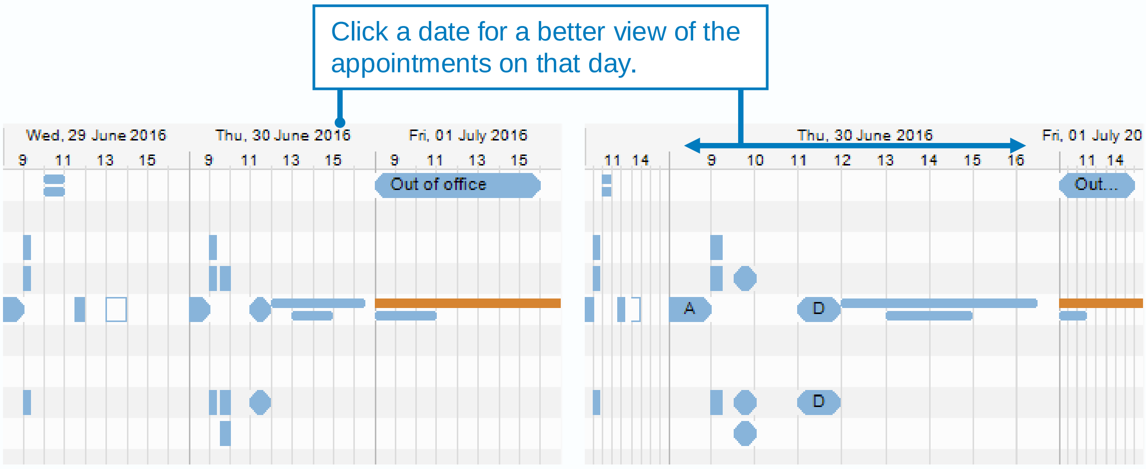

*The Time component and its calendar overview.*

**Please note: The Time component can contain more than just users.**
In most cases, the entries in the Time component will be persons. However, you can also view rooms, resources, or queues, depending on your setup.

## 4.1 Calendar Overview

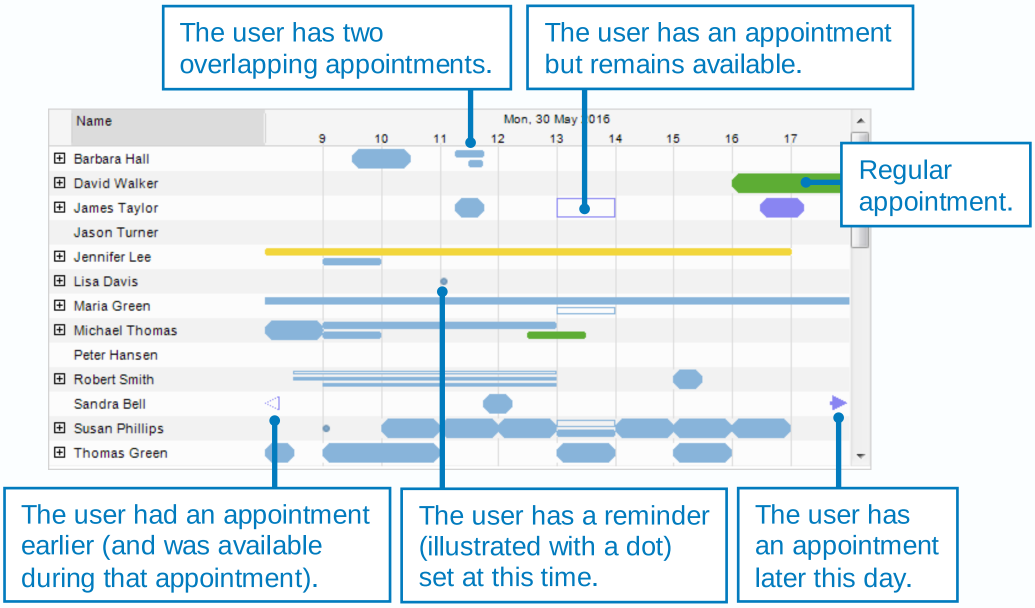
The Time component's calendar overview gives you an overview of all users' appointments. In case the calendar overview is hidden, you can activate it by right-clicking the column header and choose **Calendar.**

The number of days shown in the calendar overview can be selected in the Calendar component (section 5.3). If you choose to show more than one day, you can click on a date in the column header to expand it. This makes it easier to see the appointments for that date. Click the same date again in the column header to return to the standard view.



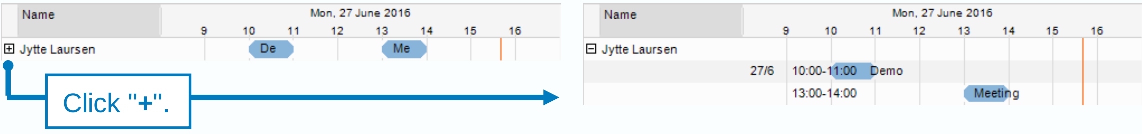

*The left image shows the calendar overview with three days displayed. The right image shows one of those days expanded.*

Appointments are illustrated as colored bars in the calendar overview. The length and position of a bar show the start and end time of the appointment. The color indicates what kind of appointment it is. If only the outline is colored, the user is available during the appointment. In case a user has appointments before or after the interval shown in the Time component, an arrow will appear in the right or left side of this user's calendar appointments. The color of the arrow indicates what kind of appointment it is. If a user has overlapping appointments, they will be shown underneath each other.



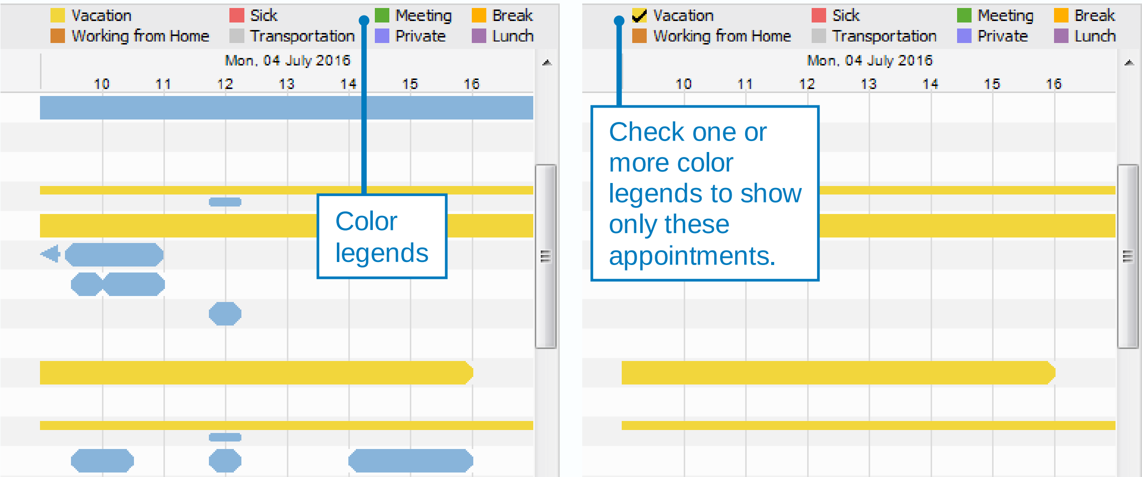

*Appointments are shown as colored bars. If only the outline is colored, the user is available during the appointment.*

Click "**+**" next to a user, if you want to show all of the user's appointments on separate rows. Click "**-**" to return viewing appointments on a single row.




*Click the plus sign to show a user's appointment on separate rows.*

If color legends are displayed (section 10.3), the colors for the different kinds of appointments are visible above the Time component. If you only want to see appointments of a certain kind, check the corresponding color legends.

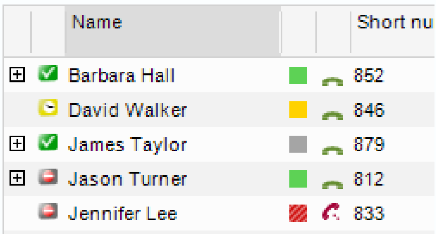



*Color legends may be visible above the Time component. You can check the color legends if you only want to see a certain type of appointments.*

## 4.2 Columns

Each column in the Time component contains different information about a user, e.g. phone number, status, or department. See Appendix A for a complete list of all columns you can enable in the component.

Some of the columns can sort the content alphabetically when you click the column header. The column used to sort the content is highlighted with a dark grey color.

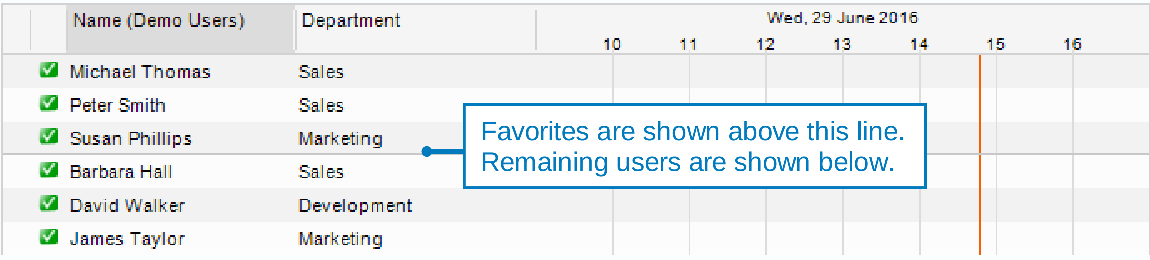



*The content in the Time component is sorted alphabetically by the dark grey column.*

## 4.3 Favorites

If there are certain users you need often, you can set them as favorites. That way, they will always be displayed at the top of the Time component. You can add or remove a favorite by right-clicking a user and choosing **Add/remove from your favorite list**. You can change the order of your favorites by dragging a favorite up or down with your mouse.

Your favorites are separated from the rest of the users with a line in the Time component. In settings, you can choose to hide favorites when searching, or make sure they are always shown (section 11.5).




*Favorites in the Time component.*

## 4.4 The Context Menu

To view all actions you can perform on a user in the Time component, right-click the user to open a context menu. The available actions may depend on your setup or the selected user or room. Usually, the menu lets you set the user as a favorite (section 4.3), send a message (section 9.1) or create an absence for the user (section 9.2).

Other common functions include **Show group membership for**, showing you a list of all the groups, this user is a member of. If you double-click a group in this list, all its members will be displayed in the Time component.

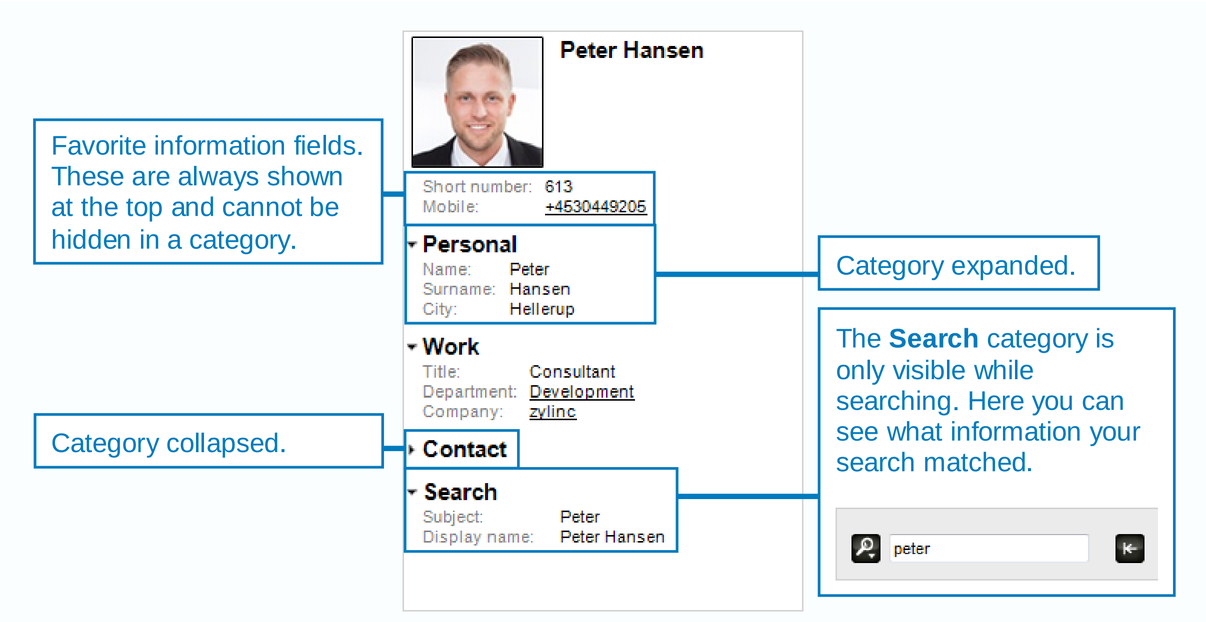
# 5 User Info and Calendar

## 5.1 User Details

In **User Details**, you can view categorized, detailed information about a user selected in the Time component. You can expand or collapse each category by clicking it. Some fields can have been marked as "favorites". These fields are always shown at the top of the component without any category.

If information is underlined, it means that you can perform an action by double-clicking that information. For instance, double-clicking an email address opens the Send Message window (section 9.1) with this email address already inserted. Double-clicking a department name will start a search for other users from that department, while double-clicking a group will navigate to that group.

If a user is found by searching, a special **Search** category is shown. In this category, you can see what user information matched your search. As you can find people based on information normally hidden in User Details, you can use this category to know why a user is listed in your search results.



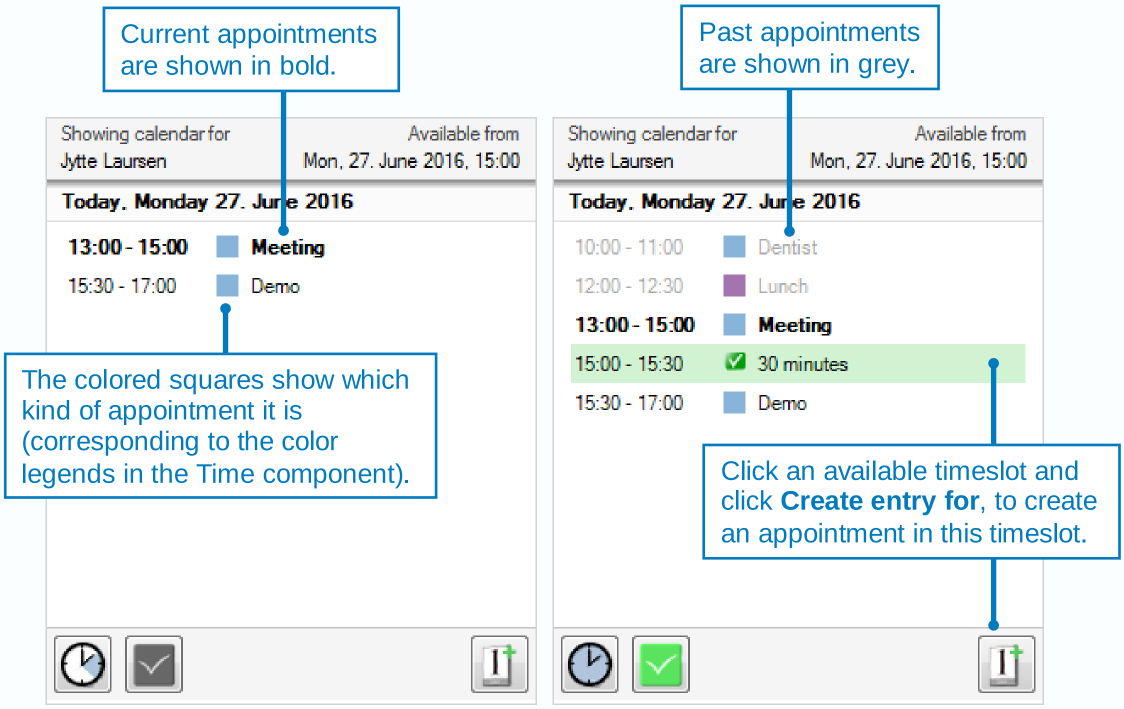

*User Details.*

## 5.2 Calendar Details

**Calendar Details** shows a list of calendar appointments for a chosen user. The number of appointments shown depends on how many days you have chosen in the **Calendar** (section 5.3). At the bottom of Calendar Details, there are three buttons: **All appointments**, **available timeslots** and **create entry for**.

By clicking **all appointments**, you can toggle between viewing all appointments for user, including past appointments, or just the upcoming appointments. Past appointments are shown in grey. Current appointments are bold.

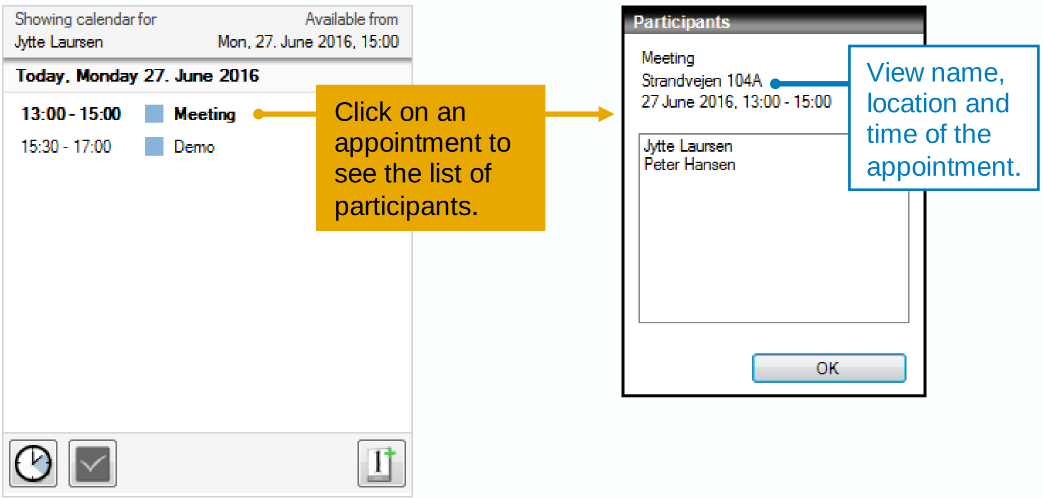
The **available timeslots** button highlights available timeslots with a green color. Each timeslot shows how long the user is available until next meeting. You can choose these timeslots and use the **create entry for** button to open your email application and create an appointment for the user in that timeslot (if you are authorized to do so). You cannot see available timeslots between past appointments.




*Calendar Details. On the left is the component without past appointments or available time slots. On the right, both features have been activated in the component.*

## 5.2.1 List of Participants

If you click on an appointment in **Calendar Details,** you will see who is participating in the appointment and its location. The list of participants can also be opened from the Time component by expanding a user's calendar appointment and clicking on an appointment.



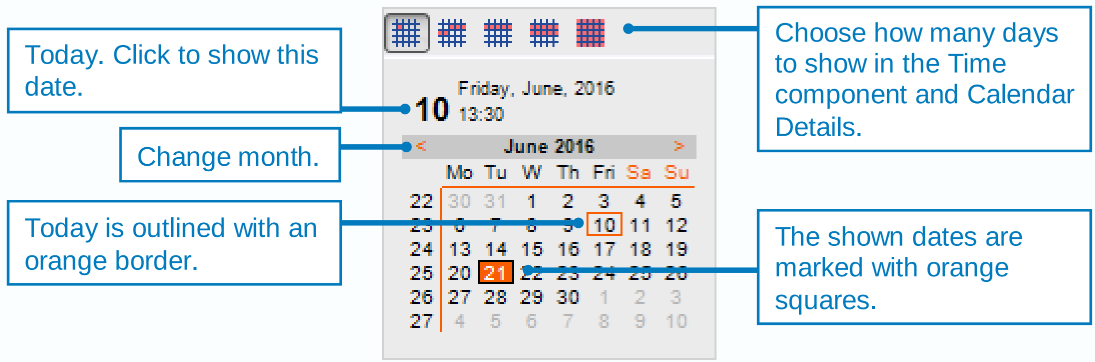

*Open the list of participants by clicking a calendar appointment.*

## 5.3 Calendar

The **Calendar** component shows the current time and date and allows you to select which day or days the Time component and Calendar Details should show. The current date is outlined with an orange border and the date(s) shown in the Time component are colored orange. You choose a date by clicking it. To change month, you click the small arrows to the left and right of the month shown.

Use the buttons above the Calendar to choose whether the Time component and Calendar Details should show one day, several days, one week, two weeks, or one month.

If you want to show two (or more) arbitrary dates, you can do this by pressing and holding the Ctrl key and clicking the dates you want to see. Please note, that this function is only possible if you have chosen to show one day at a time.



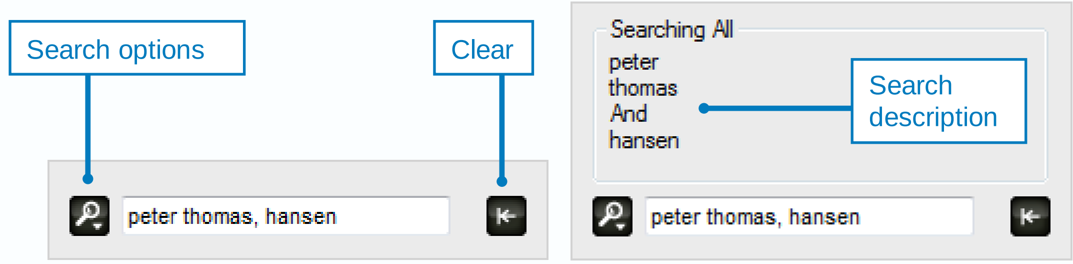

*The Calendar Component.*

# 6 Searching

Use the **Search Field** to find a specific user. You can search for most of the available user information, including names, email addresses, and phone numbers.

When you start searching, you start filtering the users in the Time component leaving only those who match your search. From the moment you start typing in the search field, you will find users matching what you have written so far. If you want to clear the search field, click the **Clear** button.

You can change the size of the Search Field component by dragging its top or bottom border with the mouse. When the height of the Search Field is reduced to its minimum, you will only be able to see a text field with your search, the **Search options** button, and the **Clear** button. If you have expanded the Search Field, you will see a description of the search you are doing above the text field.



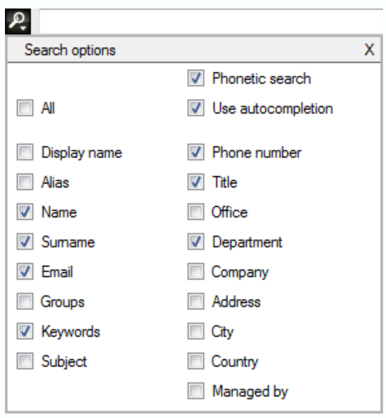

*The Search Field when reduced (left image) and expanded (right image).*

## 6.1 Search Options

You can choose what information to include in your search by clicking the **Search options** icon. Select the categories to search or simply choose **All**, if you want to search all available information.

If you have activated **Phonetic search**, you will also find users with names similar to what you typed. As an example, searching for "Peter" will return both "Peter" and "Peder" as results. Without phonetic search, only "Peter" is found.

When **Use autocompletion** is checked, the application will suggest words in the search field, while you are typing.




*Choose your search criteria.*

## 6.2 Special Characters for Searching

You can type several words in the search field. If you separate the words by spaces, you will find all users who match at least one of the words. However, you can use special characters for more advanced search requests.

| Character | Description |
|---|---|
| Space ( ) | If your search terms are separated by spaces, you will find all users matching at least one of the words in your search. |
| Comma (,) | If your search terms are separated by comma, you will find all users matching all the words in your search. |
| Colon (:) followed by a numeric code and optionally an "e" | Use colon to search in a specific category. E.g. type ":2" before your search terms to only search for names (see section 6.2.2 for more).<br><br>If you type "e" after the numeric code, you will search for an exact match in a specific category. In an exact search, all search results must match exactly what you typed. Your typed word can no longer just be a part of a search result. E.g. if you do not use an exact search, the user "Andrew" is found just by typing "An". If you do use exact search, you have to type the full name, "Andrew", before the user appears. |
| Underscore (_) | If you are uncertain about the exact spelling of a word, you can use an underscore to replace a letter or character. E.g. searching for "_laus" might return results such as "Claus" and "Klaus". Since the first letter is unspecified, both search results are valid. |
| Plus (+) | The plus sign works like the underscore i.e. it can replace any letter or character. The only difference is if you type "+" before a number (e.g. +45123). In this case, you will search specifically for the "+" symbol. |

You can also define your own search characters using **Alias** searches defined in **Settings**. See section 11.5 for more.

### 6.2.1 Space and Comma

When you type your search terms, you can use space or comma to separate them. What you should choose depends on whether you want users to match any or all search terms. An example:

| *If you type:* | *you will search for:* |
|---|---|
| Copenhagen Peter Developer | Copenhagen OR Peter OR Developer |
| Copenhagen, Peter, Developer | Copenhagen AND Peter AND Developer |

As a comma requires all search terms to be included, it can be read as an "and", while a space can be read as an "or". If you use comma instead of space, more requirements have to be met and typically, you will get fewer results.

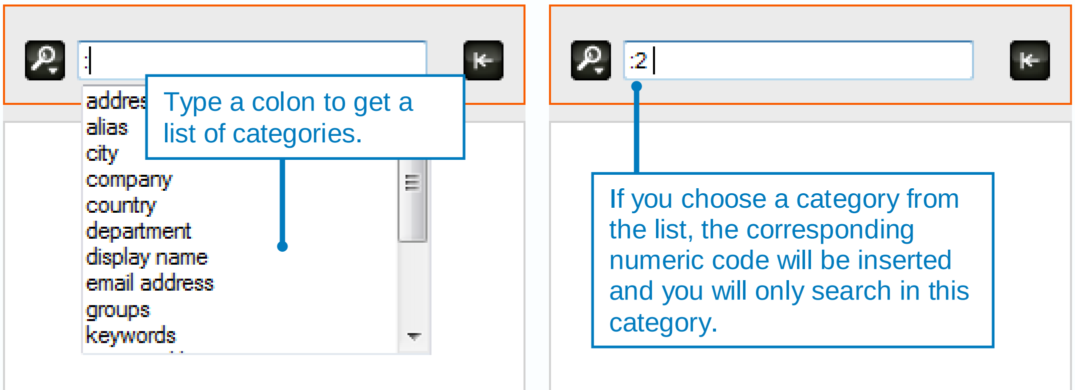
Please note, that if your search contains both spaces and commas, the application will "split" your search on the commas. E.g., if you are searching for "Support, Henrik Lasse", the application will first split the search into the fragments "Support" and "Henrik Lasse". Then the application will try to find users with information in both fragments and the result will contain the words "Support AND Henrik" OR "Support AND Lasse".

**Please note: Using space and comma as "or" and "and" is a setting you can disable.**
If neither comma nor space seems to be working as described above, this search feature might have been disabled in your application settings by your administrator.

## 6.2.2 Colon and Exact Search

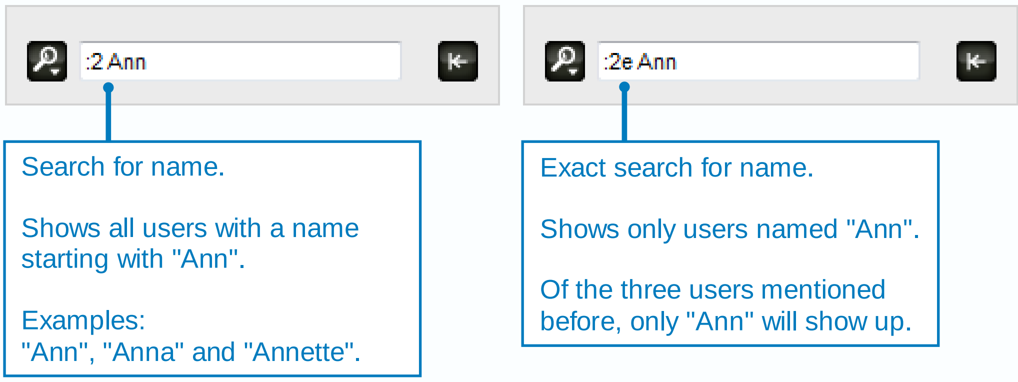
If the box **All** is checked in **Search options**, you will always search in all search categories. This may produce unwanted results, e.g. if you search for a person called "Mark" you will also find all employess from the "Marketing" department.

Instead of changing your Search options for a single search, you can use a numeric code. You do this by typing a colon in the search field and then choose a search category from the list that appears (please note that **Use autocompletion** must be checked in Search options for the list to appear). Once you have made your selection, a number representing the category you chose will appear in the search field. If you know the category's number, you can simply write the number after the colon without using autocompletion. The word typed after the numeric code will only be matched against this category. To use your regular search options, simply delete the numeric code from the search field. You can always search in a specific category using a numeric code, even if the category is normally disabled in Search options.




*You can use colon to search in a single category.*

Appendix C contains a list of all numeric codes. If you type an "e" after the numeric code, you will make an **exact** search. You will only see results that match the search exactly.




*The difference between a regular colon search (left) and an exact search (right).*

You can use numeric codes more than once in a search. Please note, that you will only find users matching a search term in all the searched categories. E.g. with the search of department and city ":6

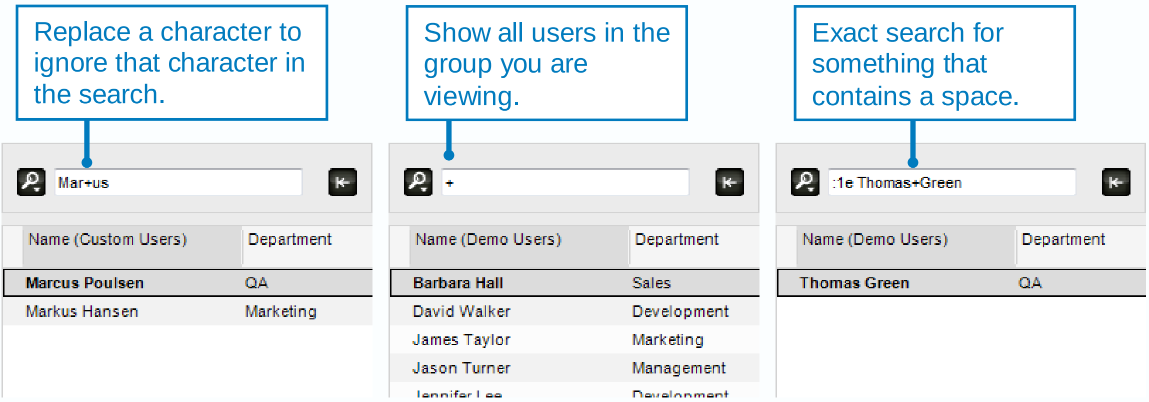
Support :8 Seattle Washington" you will find all users in the department "Support" and in the city either " Seattle" or " Washington".

### 6.2.3 Plus and Underscore

Plus (+) and underscore (_) can replace one character. E.g. if you want to search for a user named "Marcus" but are uncertain whether it is spelled "Marcus" or "Markus", you can type "Mar+us" in the search field instead of typing both names. Please note that you will also find users with similar names, like "Marius".

The plus or underscore can also be used to show all users in the Time component. If your application settings have been set to hide all users in the Time component as default, typing a plus or an underscore will cause the users to appear.

In an exact search, you will need the plus or underscore if you need to search for two words such as "Christian Jensen". Since a space represents "or", an exact search for ":1e Christian Jensen" will search for results containing "Christian" or "Jensen". If you are searching for the specific person named "Christian Jensen", you can use the plus or underscore as a substitute for the space. Searching for ":1e Christian+Jensen" will only return that specific person.




*Examples of searches where you can use plus or underscore.*

The only difference between plus and underscore is that if you type in "+" before a number (e,g, +45123), you will search for the "+" character specifically. This is useful when you want to search for a phone number including the country code.

## 6.3 Search Description

If your search field is expanded, you will see a description of any ongoing search. This includes which group you are searching in and a verbal description of your search.

You can see the selected group next to the text "Showing" at the top of the search field (or "Searching" if you have typed anything in the search field). If you have chosen to show all the users in the system, the text will be "Showing All" or "Searching All".

Below this, you will see a description of your search. This is useful when using numeric codes, as the categories they represent will be written in words rather than numbers. Commas will be written as "And". This makes it easier for you to confirm that your search terms are correct. Both plus and underscore will always be shown as underscore in the search description.


*Search description before you start searching (left image) and during your search (right image).*

## 6.4 Alias Search

If you often search with colon and a certain numeric code, you can define an **alias** for this search. This means that you can use a predefined character of your choice, like "%", instead of numeric codes such as ":2e". Characters for alias searches can be defined as exact or not exact search.

Please note that you can only use an alias, if it is the first character in the search field. If you want to search using at least two numeric codes, only the first one can be replaced with an alias in the search field.

See section 11.5 to learn more about creating your own alias or to see an overview of existing aliases.

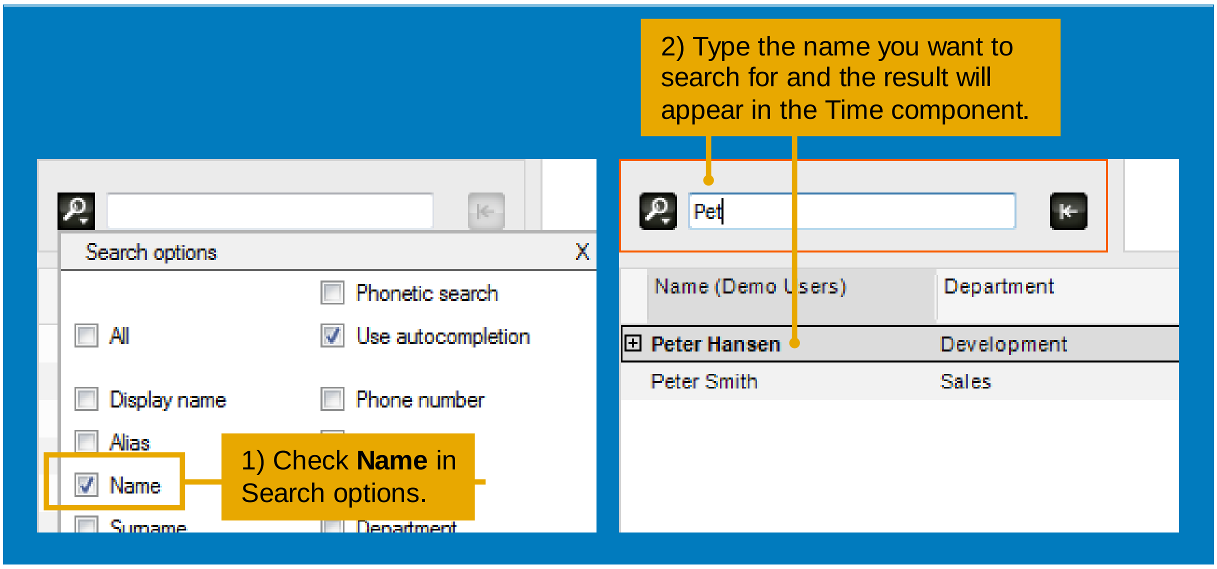
## 6.5 Auto Search and Previous Searches

Sometimes the application will automatically find a user for you in the Time component. In that case, the search description will show that an **auto search** was done, which means the application has found a user for you. Auto searches can be performed when you e.g. double click a user's alternative contact in user details to view him or her in the Time component.

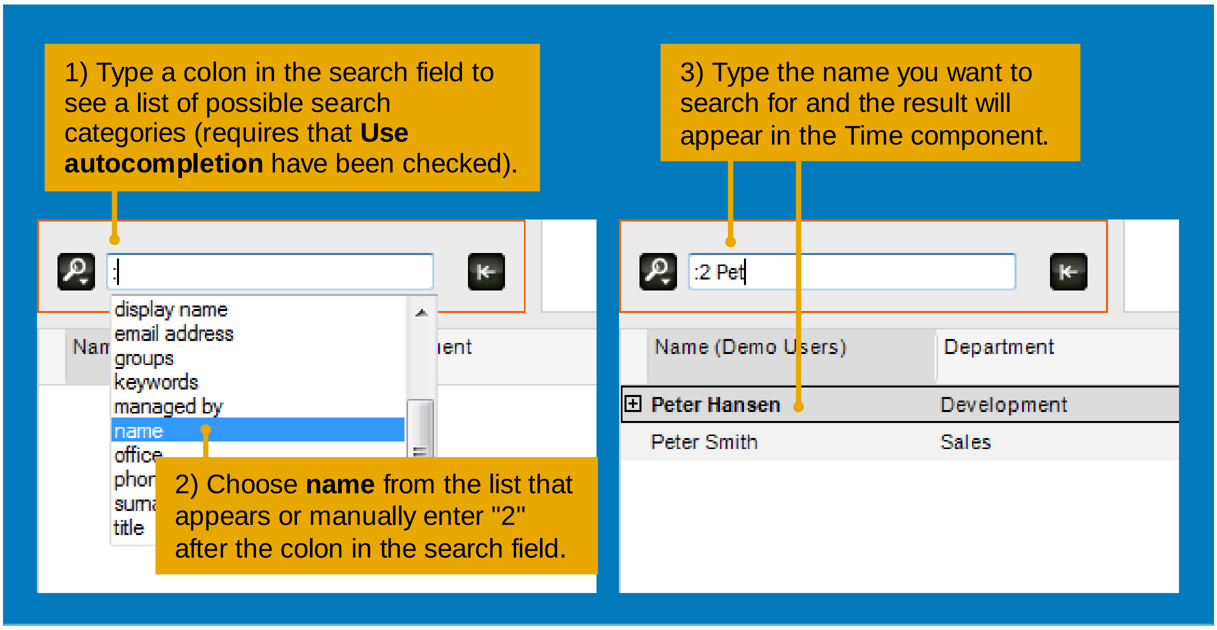
If your search terms were deleted by an **auto search**, you can use a shortcut to return to your previous search. This way you will not have to type it again. To browse your previous searches, you need to have shortcuts configured for **Get previous search** and **Get next search**. See section 11.5 to learn more about how to do this in **Settings**. You can view all your shortcuts in the **Help** menu in the top of the window.

## 6.6 Search Examples

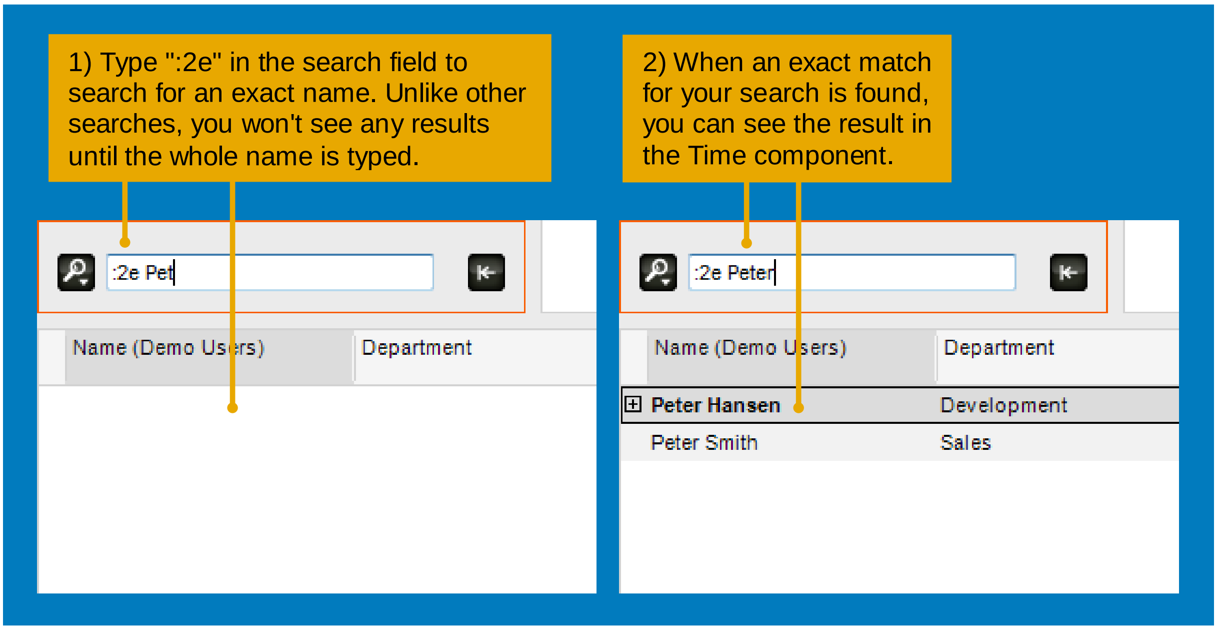
### 6.6.1 Search by Name using Search Options



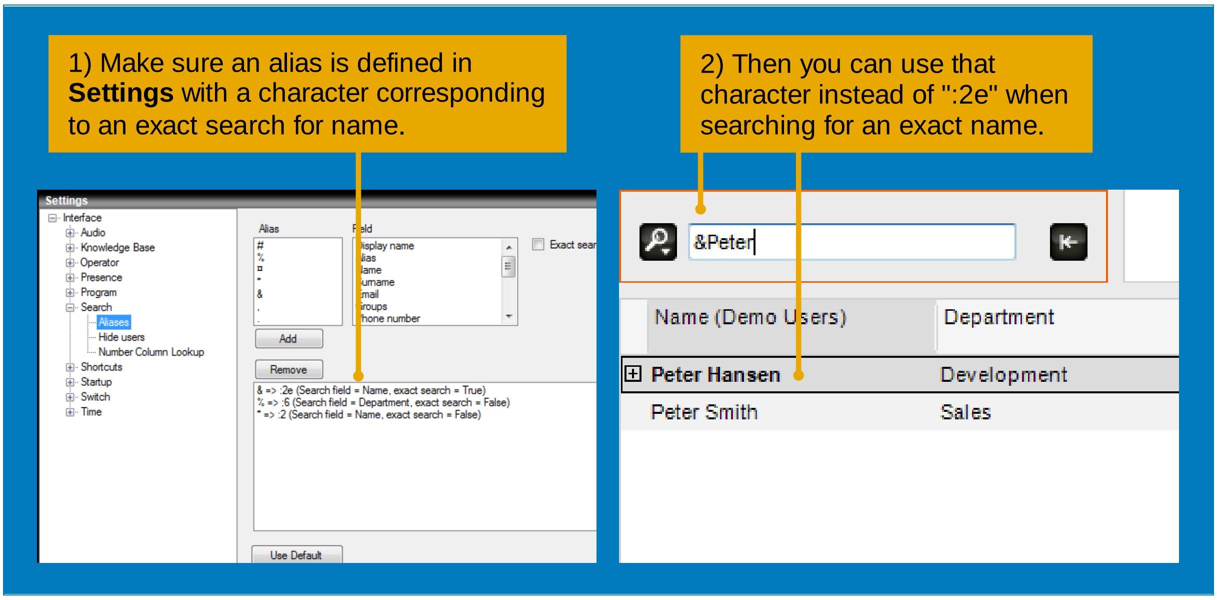

### 6.6.2 Search by Name using Colon



### 6.6.3 Exact Search for Name




### 6.6.4 Exact Search for Name using Alias



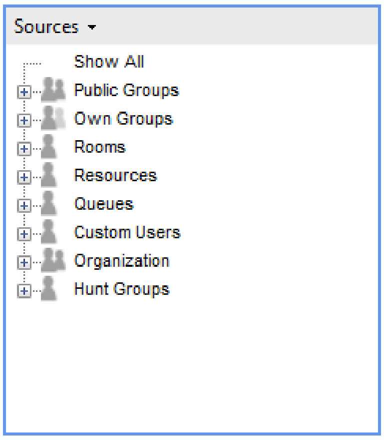
# 7 Groups and User Editing

A group is a set of users. This could be departments or people with special responsibilities or qualifications. If you select a group by clicking it, its members will be displayed in the Time component. When a group is selected, you will only search in this group. You can only view one group at a time in the Time component.

You can see which group is selected by:

- The column **Name** in the Time component where the name of the group will appear in parentheses.
- The group name above the **Search field** if this is expanded.
- The highlighted group in the **Groups** component.

If you have chosen **Show All** instead of choosing a group, the column **Name** in the Time component will not contain any parentheses and the search description will say "Showing All".




*The Groups component.*

## 7.1 Groups

There are two kinds of group. Groups you can edit and groups you cannot edit. Both kinds will be covered in the following sections.

### 7.1.1 Group Overview

The list below covers all the groups you can view in the Groups component. You can add new groups in **Own groups** and new people in the group **Custom Users**.

| Group | Description |
|---|---|
| Public Groups | Groups defined by your company. |
| Own Groups | *In this group, you are able to create your own groups. See section 7.1.2 for more details.*<br><br>All groups created by you. These are only visible to you. |
| Rooms | Rooms in your company. These are displayed in the Time component in the same way as people. You can view if or when a room is available in each room's calendar. |
| Resources | Resources in your company. These are displayed in the Time component in the same way as people. You can view if or when a resource is available in the calendar of that resource. |
| Queues | All the queues in your system. This is useful if you would like to look up the number of a queue. |
| Custom Users | *In this group, you can create new users. See section 7.1.3 for more details.*<br><br>Shows a list of people you have created. These are displayed in the same way as other people in the Time component. |

| | |
|---|---|
| Organization | As opposed to **Public Groups,** the groups in **Organization** may have several subgroups. Your company can use the Organization group to display departments and subdivisions. While a person can belong to several different groups, he or she can only hold one position in the organization. This restriction makes it possible to move "up" in the organization, starting from a person. |
| Hunt Groups | All Hunt Groups in the system. These can also be seen in the Hunt Groups component (chapter 8). |

Besides these groups, you can select **Show All** at the top of the **Group** component to display all users regardless of their grouping. If there is an option called **Sources** above the groups, you can hide the groups you do not need in the **Group** component.

**Please note: Some sources may be hidden by your system administrator.**
If you are not able to see all the sources described in this section it might be because they have been hidden in your system by your system administrator. If Own Groups and Custom Users are hidden, you will not be able to create your own groups or users.

### 7.1.2 Own Groups

Your **Own Groups** are groups that you can create, delete, and edit yourself. They are only visible to you and no other user will be able to view or edit them. With your own groups, you can group the exact users who are relevant to you.

You create a group by right-clicking **Own Groups** in the group component and select **Create Own Group**. A new group with the name "Create New Own Group" will be created.

Once you have created a group, you can right-click it to rename it, remove it, or create a new group in this group. If you want to add users to the group, use the mouse to select and "drag" them from the Time component into the group. Please note that if you delete a group, all the subgroups in that group will also be deleted. It is not possible to restore a group once it has been deleted. You can only delete your own groups, not public groups.

When you click a group with subgroups, members of all subgroups will also be displayed in the Time component. Members of subgroups are considered equal members of the group as all other members in the selected group.

To copy a **Public Group** to one of your **Own Groups**, select it in Groups and drag it to the group, where you want to add it. Alternatively, you can right-click a public group and choose **Add to groups** and select one of your own groups. You cannot rename or add new members to a public group that you have copied to your own groups. If the original public group is changed, your copy of the group will also change automatically.

### 7.1.3 Custom Users

**Custom Users** allows you to create new users in the system. You can choose to make the users public or only visible for you. The following section will describe how to create a new user. See section 7.2 for details on how to edit a user.

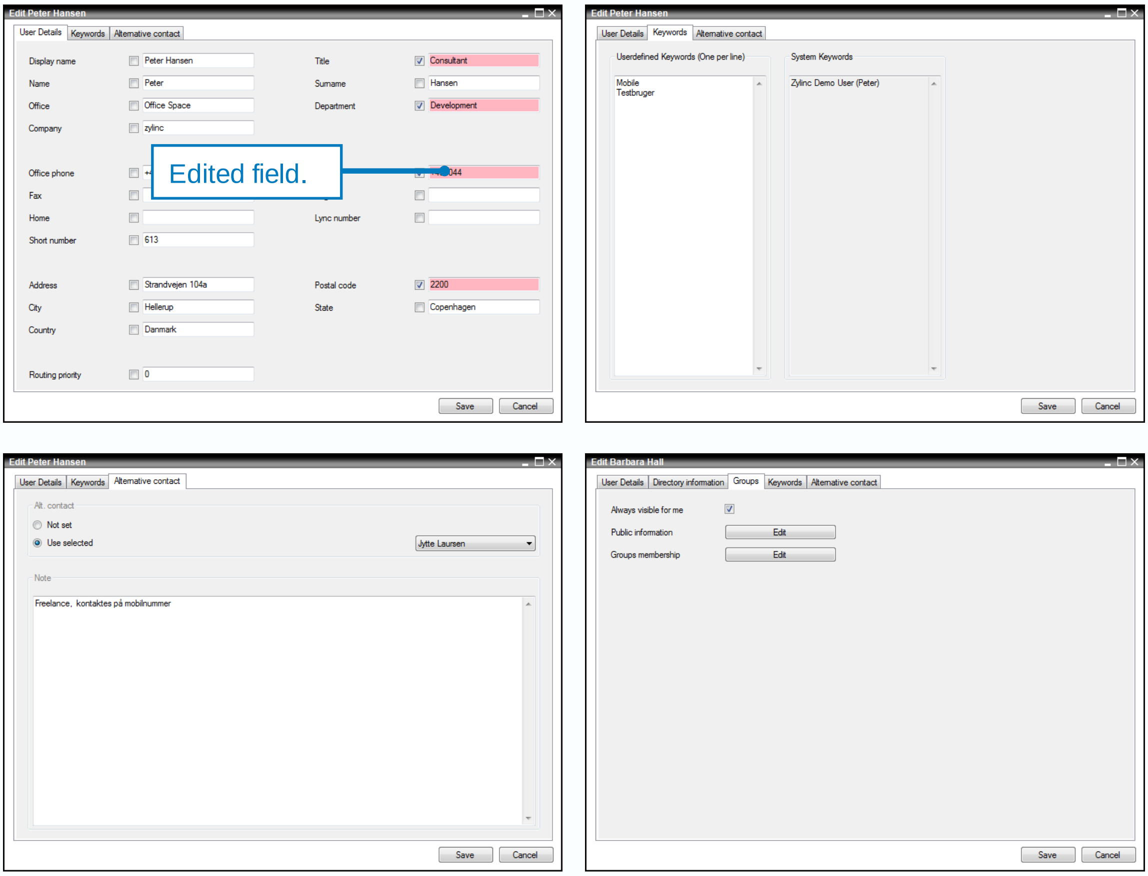
If you right-click **Custom Users**, you will get four options: **Create user**, **Export all**, **Import additional users** and **Import and replace existing users**.

| Options | Description |
|---|---|
| Create user | This option will immediately create a new user named **New user**. You can edit the details for this user such as their name and phone number (see section 7.2). |
| Export all | **Export all** lets you save all your users and their details in a file. Choose where you want to save the file on your computer and click **Save**. This is useful if you want to share your custom users with a colleague as you can send them this file. |
| Import additional users | If you have a file with custom users (e.g. created through the option **Export all**), you can add them to the list of your users. Click **Import additional users** and navigate to the file on your computer. Click **Open** and the users will be added. |
| Import and replace existing users | This option works in the same way as **Import additional users** except your original users will be deleted. If you want to save your custom users, you should choose **Import additional users** instead or first use **Export All**. |

## 7.2 Edit a User

If you right-click a user, either in the Time component or in the Groups component, you can use the option **Edit** to change the user's information.

You will see different tabs of information depending on whether the user was created with Custom Users or the user was a public user. The four tabs relevant to editing a user are described below (a fifth tab called "Database information" is available for more advanced setup of custom users, which is out of scope for this manual). When you edit a public user, your changes will be visible to all other users in the system.




*The four tabs you can use to edit a user. Top left: User Details. Top right: Keywords. Bottom left: Alternative contact. Bottom right: Groups*.

In the tab **User Details,** you can see general contact information for a user. If you edit the fields for an existing user, they will turn red and the box to the left of the field is checked. To erase your changes and show the original system information, uncheck this box. Please note that you can only see the tab, if you have permission to edit the user's information.

In **Keywords**, you can add keywords for a user. Enter your keywords in the field on the left, one for each line. In the field on the right, you can view which keywords are already associated with the user.

In **Alternative contact**, you can select a person who can be contacted instead of the user and you can add a note to the user.

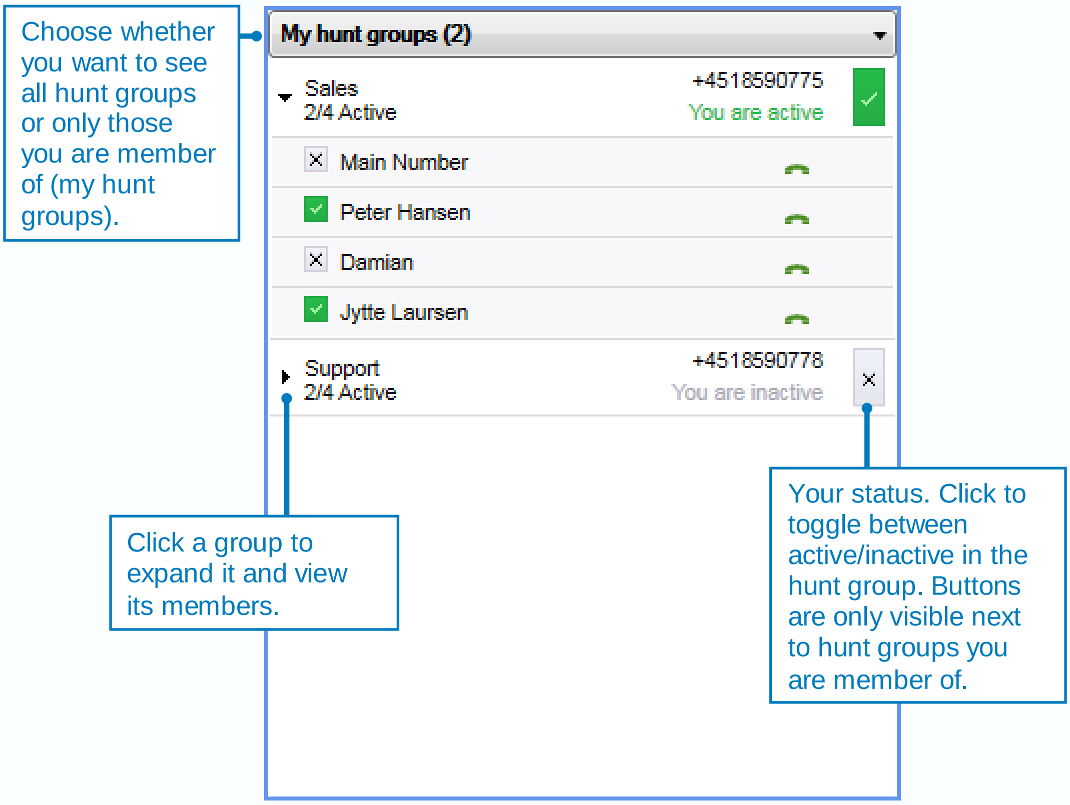
The tab **Groups** is only visible for **Custom Users**. In **Group membership** you can select which groups the user should be member of and thus appear in. **Public information** allows you to select which groups of users, who should see this user – no one else will be able to see the user. If you are not member of any of the groups who can see the user, check the box **Always visible for me** if you want to see the user anyway. Either way, your custom user will always be visible in the Custom Users group.

# 8 Hunt Groups

The component **Hunt Groups** is only accessible if the company uses BroadWorks. It shows you all company hunt groups and their members.

At the top of the component, you can switch between viewing all hunt groups and only the hunt groups you are member of. For each hunt group you can view the group's name, phone number, number of active users and your own status (if you are member of the group). If you click a hunt group, it will expand and you will be able to see its members.

For each member you can see the person's status in the hunt group and phone status.



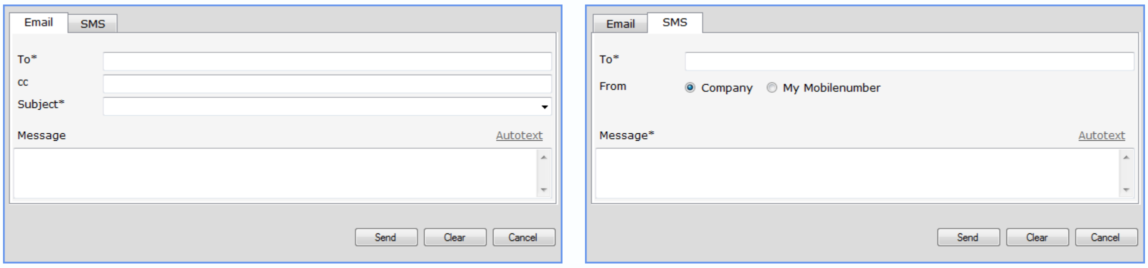

*The Hunt Groups component.*

# 9 Other Application Features

This section describes other functions and possible actions in the application. Most of the functions mentioned in the sections below are found in the **Actions** menu or appear when you right-click a user in the Time component.

## 9.1 Send Message

In **Send Message** you can email or text another person. Click **Send** to send the message, **Clear** to delete everything (apart from what you typed in the "To" field) and **Cancel** to close the window without sending a message. All content is deleted when you close the window. If you chose one or more persons in the Time component, they will automatically be added as recipients in the window.

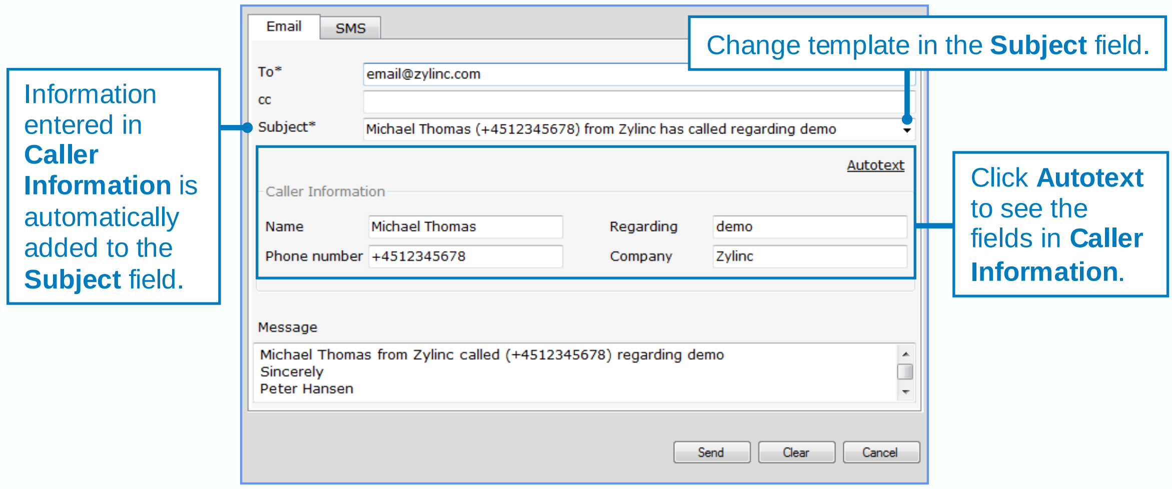



*The Send Message tabs: Email (left image) and SMS (right image).*

In the tab **Email** you can send an email to one or several email addresses by separating the addresses with commas. You are required to fill in the "To" and "Subject" fields.

Choose **SMS** to send an SMS to one or several users. Type the users' mobile numbers, separated by commas, and your message. If you have a mobile number, you can choose whether the message should be signed with your own number or the name of the company. If you do not have a mobile number in the system, the message will automatically be signed with the name of the company.

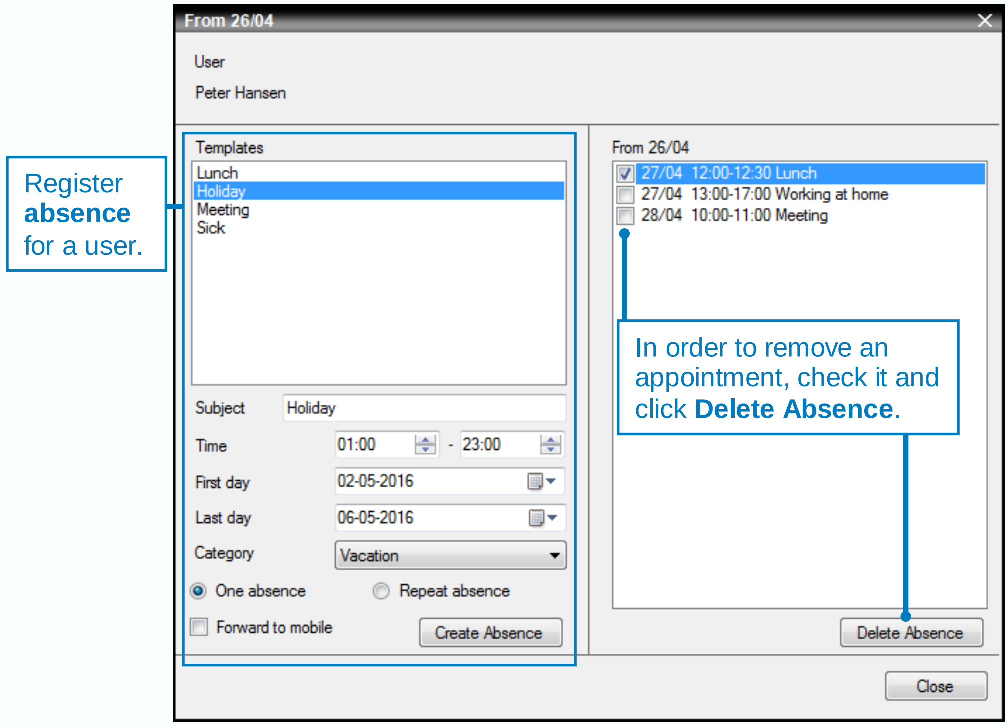
The **Autotext** function is available in both tabs and can be used to create a phone message quickly. By clicking it, you activate extra fields where you can fill in who called, company, phone number and why they were calling. The content of these fields are automatically transformed into a coherent written message and will be added to the **Subject**, and sometimes **Message**, fields (emails) or **Message** field (SMS). You can choose between different templates for the message that is automatically created from the autotext fields, by clicking the arrow on the right in the subject.




*Autotext activated in the Email tab.*

## 9.2 Absence

In **Absence,** you can create simple calendar entries, which are often used to indicate absence or unforeseen events. Choose the person you want to register absence for and click **Absence** in the **Actions** menu or the user's context menu (right-click the user). The window shown below will open.




*Create or remove an absence appointment for a user.*

Describe the reason for the absence in the **Subject** field, e.g. "gone for the rest of the day" or "in a meeting", and set the start and end times for the absence. If you choose a different **First day** and **Last day** for the absence, you can choose whether the absence should be repeated each day in this period or whether it is one continuous absence starting and ending on those days. If you want the absence to be colored according to type, you can choose a category for the absence like "Sick" or "Holiday".

Predefined templates may be available when you create an absence. If available, you can choose a template in the list to fill out the required fields automatically.

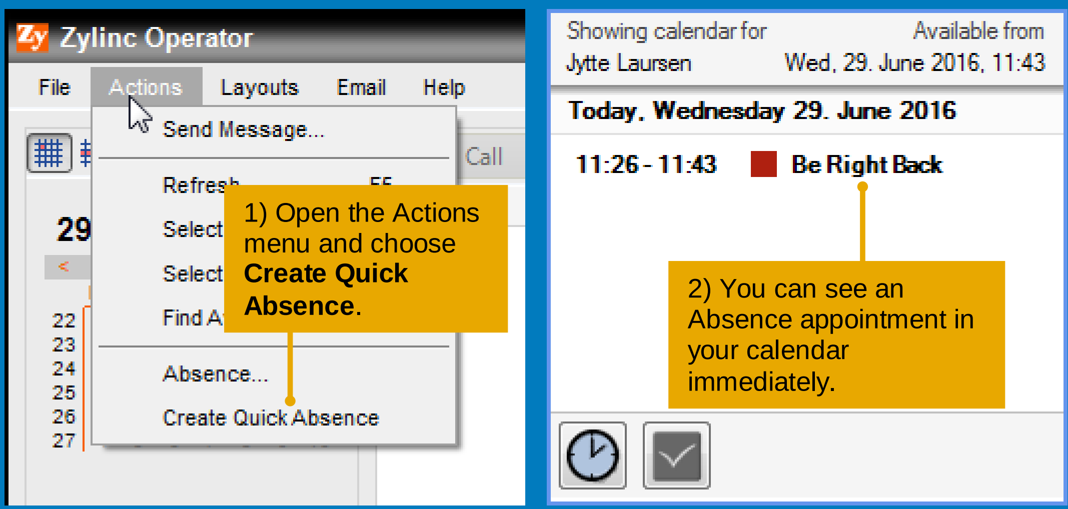
When a user is absent, you can make sure calls are forwarded to the user's mobile phone. This is done by checking the *Forward to mobile* box. This option is not always available (for instance, if the user does not have a mobile number).

Click **Create Absence** to save the absence in the user's calendar and click **Close** to close the window. To remove an absence, choose the absence in the right side of the **Absence** window and click **Cancel Absence**.

**Please note: Absences may create a forwarding by default.**
Depending on your setup, all or some absence categories may automatically create a forwarding to a predefined number.

## 9.2.1 Quick Absence

You can register a **Quick Absence** if the feature has been enabled by your system administrator (not available in Zylinc Attendant Console). Quick Absence is a short, predefined absence appointment you can create using a shortcut or choosing the option from the Actions menu. The benefit of Quick Absence is that you can quickly tell your colleagues that you are busy without having to open a window. You can cancel a Quick Absence the same way you cancel regular Absences. Please note that Quick Absences are always created for yourself, regardless of who is chosen in the Time component.




*Example: How to create Quick Absence in Zylinc Operator.*

## 9.3 Forwarding

If you want to forward calls to a different phone, you can use the **Set Forward for** feature. You can do this for both yourself and others.

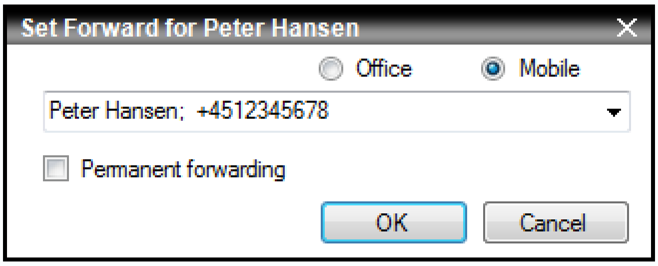
There are three kinds of forwarding: **Regular forwarding, Calendar-based forwarding, and permanent forwarding.**

### 9.3.1 Regular Forwarding

To create a regular forwarding for someone or yourself, right-click the person in the Time component and select **Set forwarding for**. A window will open where you can choose to forward calls to an office or mobile phone and which user you want the calls to be forwarded to. Alternatively, you can simply type the number you want to forward to. Click **OK** to activate the forwarding.

To delete a forwarding, right-click the user and select **Remove Forward for**.

If your settings permit it, you will also be able to forward your own calls simply by right-clicking the person you want your calls forwarded to and select **Forward to** and then choose if it should be permanent or not.




*This window appears when you right-click a user and selects **Set Forward for.***

### 9.3.2 Calendar-based Forwarding

A calendar-based forwarding ensures that calls are forwarded when the user has a certain type of appointment. This kind of forwarding is automatically deactivated when the appointment is over.

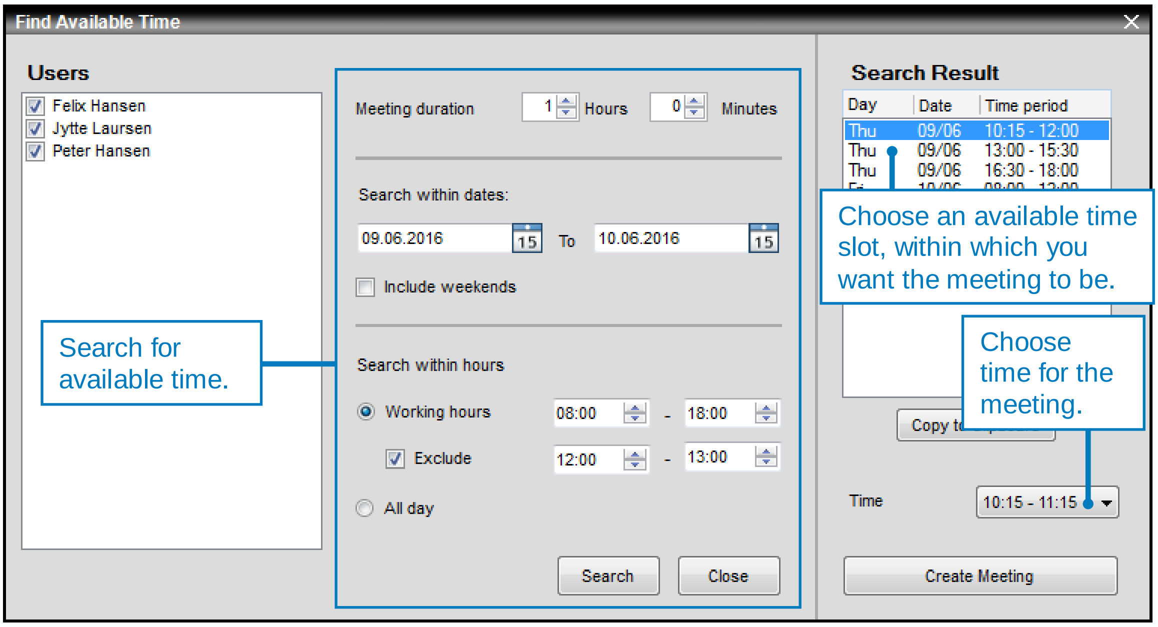
### 9.3.3 Permanent Forwarding

A calendar-based forwarding will always overrule a regular forwarding. To avoid this, you can create a permanent forwarding instead of a regular forwarding. The only difference between a regular and permanent forwarding is that the permanent forwarding is not overwritten by calendar-based forwarding.

A permanent forwarding is created the same way as a regular forwarding. You just need to check the box **Permanent forwarding** when the forwarding is created.

## 9.4 Find Available Time

**Find Available Time** makes it easy to see when your colleagues are available for appointments and meetings. Select the colleagues (in the **Time component**) you want to attend the meeting and find out when they are all available.




*The **Find Available Time** window.*

Find the relevant colleagues in the **Time component** and mark them one by one, by pressing and holding the Ctrl key while you click them. Once you have marked the relevant colleagues, click **Find Available Time** to open the window illustrated above. Alternatively, you can simply choose a group. If some members of the group should not attend the meeting, you can uncheck them in the **Find Available Time** window.

Choose the duration of the meeting and the time interval (days and hours) within which you want to search for available time. Click **Search** and all the results will show up in the **Search Results** field in the right side of the window. The **Copy to Clipboard** button lets you copy the search results into another application or an email. In order to schedule a meeting, choose one of the time slots from your search results, specify the time of the meeting, and click **Create Meeting.** Your email client will now open with the participants and the time of the meeting already inserted so you can quickly create the meeting from here.

## 9.5 Create Entries with your Email Client

You can create appointments from your email client, which will automatically be opened from Zylinc's desktop applications. If you have chosen one or more users in the **Time component**, these will automatically be included in the appointment.

There are four kinds of entries: **Appointment, meeting, memo** and **create entry for.**

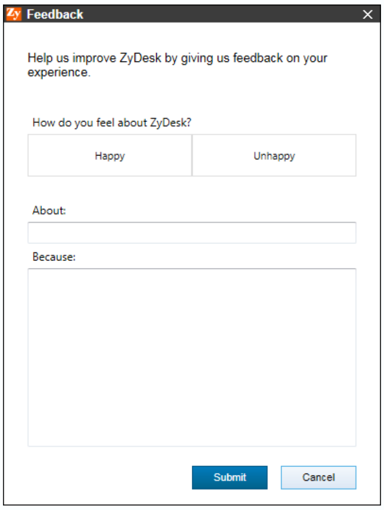
| Type of entry | Description |
|---|---|
| Create appointment | Create a new appointment in your email client. You can only create appointments for yourself regardless of whether you have chosen other users in the Time component. |
| Create meeting | Create a meeting in your email client. Users marked in the Time component will be inserted as participants of the meeting. |
| Create memo | Write a new email. Users selected in the Time component will be inserted in the "To" field of the email. |
| Create entry for | This option is only available if you have permission to create entries for other users. If you do, this function lets you create entries in other users' calendars. |

These functions are available in the top menus **Actions** or **Email** or by right-clicking a user in the **Time component**.

## 9.6 Feedback

If you have suggestions on features that could be improved or other things you would like to change in the application, we are happy to hear from you. Your feedback is highly appreciated as it helps us improve future versions of the applications, so we can give you the best possible products. In the top menu **Help,** you can select **Feedback** to open a window where you can tell us about your experience with the application.

In the **Feedback** window, select either **Happy** or **Unhappy**, and specify why you feel this way. Click **Submit** to submit your feedback. You can send feedback as often as you wish.



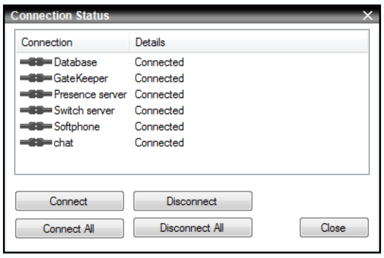

*The Feedback window.*

## 9.7 Connection Status

Should you experience problems with the application, e.g. you cannot see other users' phone status or take calls, please check your connection status.

Open the **Connection Status** window by double-clicking the icon with the two cables in the status line. Here you will see the status of the different connections used by the application.

All connections should be connected. If one or more connections are not successfully connected, the application might not function properly and you should contact your system administrator.




*Connection Status.*

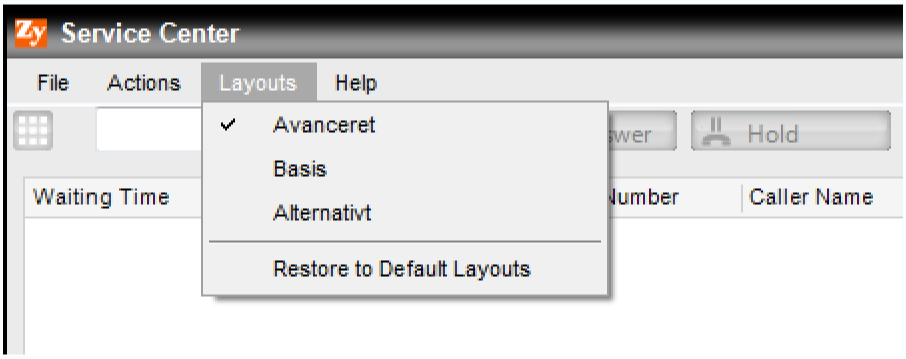
# 10 Customize the Application's Appearance

The following sections cover how to customize the appearance of the application to fit your needs and preferences.

## 10.1 Layouts

All Zylinc desktop applications have a top menu called **Layouts**. Here you can choose an overall layout for your application. The difference between layouts is typically which components are shown permanently, which are shown in dock strips, and how the components are positioned relative to each other. This lets you choose a layout that best suits you work habits.

You can change the size of a component by dragging the edge of it. Your changes will be saved as part of the chosen layout. If you regret your changes, you can always reset the layout by choosing **Restore to Default Layouts**.



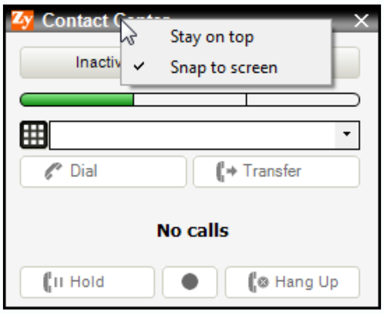

*The **Layouts** menu from Zylinc Service Center.*

## 10.2 Appearance of Windows

If you right-click the title of a window, you can choose to make the window **Stay on top** or **Snap to screen**.

The first option ensures that the window can never be hidden behind other windows on your screen. That way you can always see the window.

The other option attaches the window to the edge of the screen, when you drag it towards it.




*Choose how to show windows (image from Contact Center).*

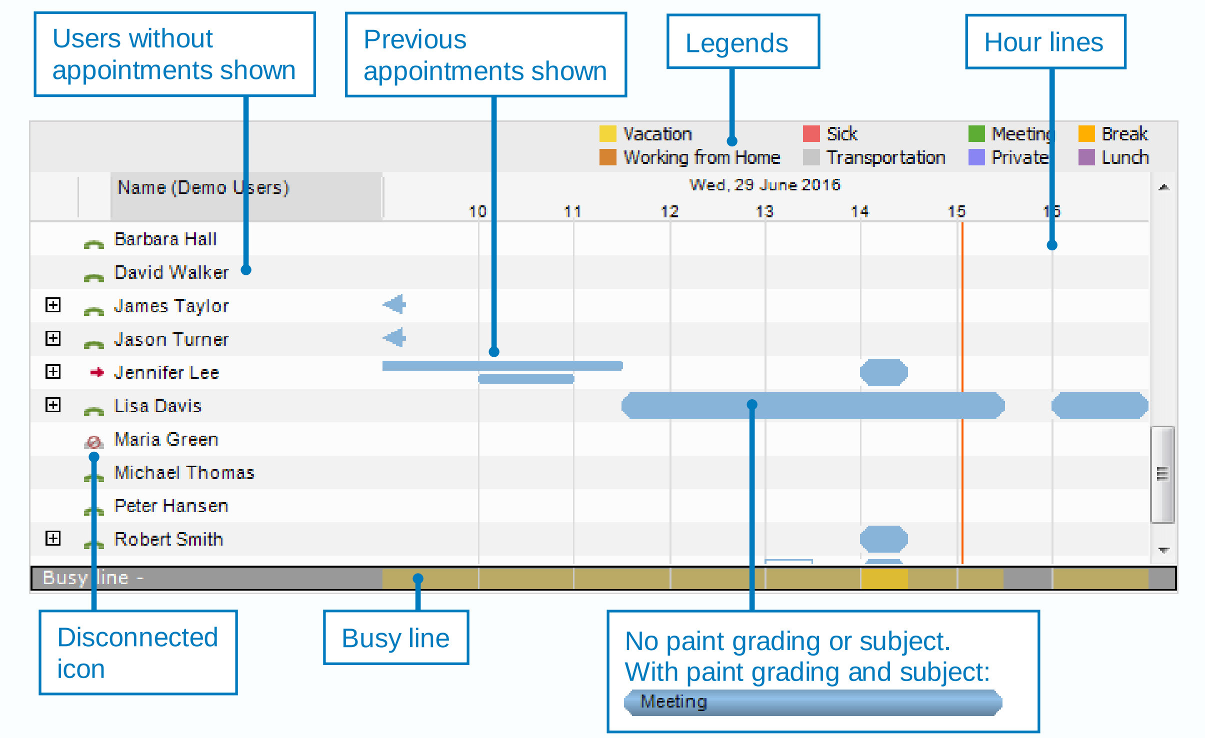
## 10.3 Customize Appearance of the Time Component

You can customize and change the graphical appearance of the Time component and its calendar overview by using **Time Preferences**. Depending on which Zylinc desktop application you are using, you open **Time Preferences** in a new window from the **File** menu or you use the toolbar at the top of the Time component.

Among the settings are a number of boxes you can check to activate or deactivate functions, as well as the time interval you want the calendar overview to show. If you are using an application where Time Preferences are above the Time component, you can also choose whether you want to see all types of users or only a limited amount of user types e.g. rooms only.

The functions you can activate in Time Preferences are presented below.

| Function | Description |
|---|---|
| Show Subject | Appointment subject is written in the colored bar in the calendar overview. |
| Show Hour Lines | Show a thin line for every hour in the calendar overview. |
| Paint Grading | Add a shadow effect to the colored bars in the calendar overview. |
| Show Busy Line | Show a busy line at the bottom of the Time component. If you choose several users in the Time component, it summarizes the appointments. The more yellow the line is, the less available the users are. |
| Hide users without appointments | This option makes it possible to show only users with an appointment. This is useful if you want an overview of how many are busy in the chosen period. Please note, if a user was hidden because he or she did not have any calendar appointments, you cannot find that user with a search. |
| Show Legends | Show an overview of what each appointment color means. You can also use this to show appointments only of a certain type by checking the corresponding colored field. |
| Hide previous appointments | Automatically update the starting time of the displayed time interval thus only displaying appointments from the current time of day. |
| Hide disconnected icon | The user's phone status will be left empty if the user's phone is disconnected. |
| Users shown (only in the tool line) | Only show people, resources or rooms, or all three types of users (these options have their own dropdown in the Time component's toolbar). |

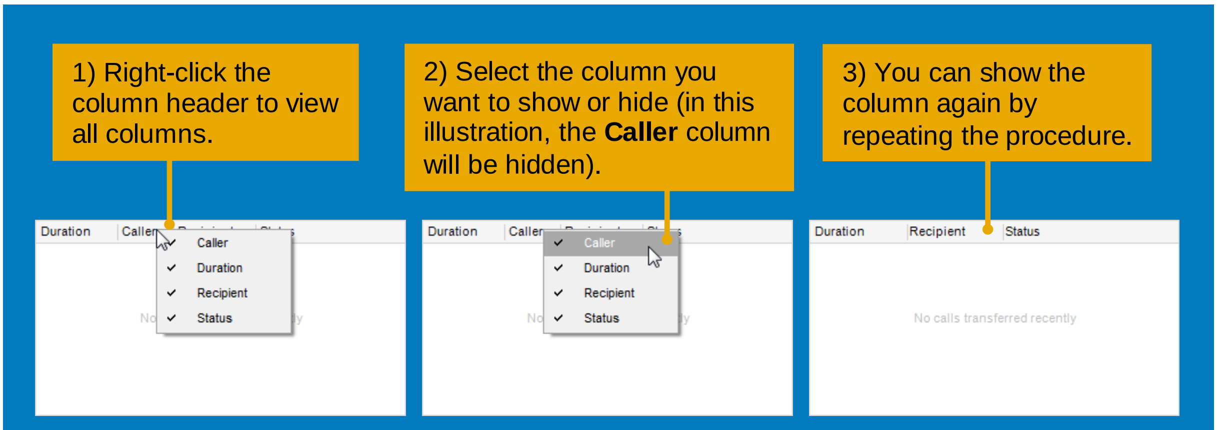



*The graphical representations you can change in Time preferences.*

## 10.4 Columns Displayed in Components

In some components, you will see a number of columns in the top. Right-clicking a column will usually let you access a context menu in which you can add or hide certain columns. This applies to e.g. the **Time component**.

You can expand and reduce the width of the columns by "dragging" their edges with the mouse, or change their order by "dragging" the column to a new place in the component.

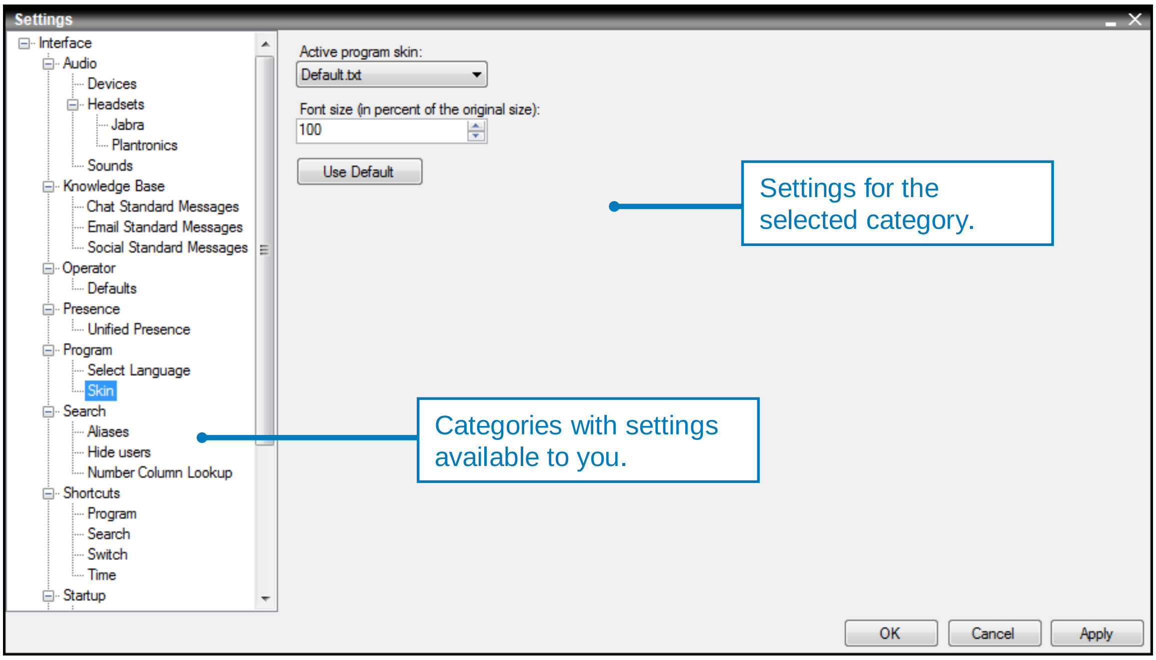



*How to change which columns are displayed in a component (example from the **Transfers** component from Attendant Console and Service Center).*

# 11 Settings

The **Settings** window gives you access to a number of options for adjusting the appearance and features of the application**.** You can access **Settings** from the **File** menu. Settings are grouped by category. These can be accessed on the left hand side of the settings window. On the right hand side, you can view and change settings for your selected category. The settings most used for all Zylinc desktop applications are described in the following.

**Please note: You might see other settings than those described here.**
There may be discrepancies between the settings mentioned in this chapter and the ones available in your application. For instance, some functions may be activated or deactivated during installation and others may not be supported by your system. If you want to know more about a setting not described in this manual, contact your system administrator.




*The **Settings** window.*

The following sections cover each category and its settings. All categories are grouped under the **Interface** category as shown above.

**Please note: If a setting seems to have no effect, try restarting.**
Certain settings require a restart of the application to take effect.

## 11.1 Shortcuts

| Category | Settings |
|---|---|
| Program | Create a global shortcut to bring the application into focus (e.g. if it is hidden behind another window), or create a shortcut to open **Help**. |
| Search | Create shortcuts to move the focus to the search field and to clear it. You can also define shortcuts for **Get previous search** and **Get next search** (see section 6.5 for more). |
| Time | Create shortcuts for functions related to the Time component. These include<br>▪ The ability to refresh the information in the Time component<br>▪ The sorting options mentioned in Appendix A<br>▪ Open **Send Message** (both email and SMS), **Absence,** and **Create Quick Absence**. |

## 11.2 Operator

| Category | Settings |
|---|---|
| Defaults | Choose which phone number to use by default, when a user is chosen. |

## 11.3 Startup

| Category | Settings |
|---|---|
| Login | Configure the two startup windows described in section 3.1.You can set the Login window to always appear when you start the application, even if the **Remember** box is checked. You may also choose whether you want to always show the Start Profile window or skip it if possible. If you choose the latter, and you only have one available profile, the window will not show up. |

## 11.4 Program

| Category | Settings |
|---|---|
| Skin | Here you can choose **skin** for your application and change font size. The skin determines what the graphical elements look like, such as the color shades of the components. |
| Select Language | Choose which language you want your application in. |

## 11.5 Search

| Category | Settings |
|---|---|
| Aliases | View, create, and remove your **alias** search options (see section 6.4 for more). First, choose the character you want to use as the alias. Then, in **Field**, choose which field to use when you type your alias character. Finally, choose whether the search should be exact or not. You cannot reuse characters or choose other characters as alias than those suggested. |
| Hide users | Choose whether you want to view users in the Time component only when searching or always. You can also choose whether your favorites should be hidden in the Time component when you search. |

## 11.6 Presence

| Category | Settings |
|---|---|
| Unified Presence | Select which status types should affect Unified Presence (see Appendix A for more). |

## 11.7 Time

| Category | Settings |
|---|---|
| Calendar | Choose how many days the Calendar component should show. |
| Available from | Select what the **Available from** column in the Time component is based on. You can choose a minimum of minutes, users should be available, before they are displayed as available. For example, if you set the value to 15 minutes and a user is only available 10 minutes between two meetings, you will not see the user as available until the second meeting is over. |

# Appendix A: Columns in the Time Component

You can choose to show several different columns in the Time component. These are described in the following. Most of the columns are hidden by default, but you can enable them by right-clicking the column header in the component (section 10.4). For some columns, you can double-click the information to perform an action while others have special shortcuts related to the information.

| Column name | Description | Related functions |
|---|---|---|
| Agent Status | Status icons for the company's agents. | |
| Alternative contact | The person to contact if the user is busy. | *In Settings, you can create a shortcut to show a user's alternative contact in the Time component.* |
| Available From | This field is empty if the user is already available. Otherwise, you will see when the user becomes available. | |
| Calendar | Calendar overview. | Click a meeting to view other participants (only possible when the appointments are displayed on individual rows). Double-click one of your appointments to open it in your calendar application.<br>*See section 10.3 to learn more about how the appearance of this column can be customized.* |
| Camp | Calls waiting for the user. | |
| Company | The user's company. | |
| Department | The name of the user's department. | *You can use shortcuts to sort users by department or show all users from the same department as the selected user if this has been configured in Settings.* |
| Email | The user's email. | |
| Expand/collapse | If the Calendar column is displayed, this column is automatically shown. If a user has appointments during the day, you will see a "**+**" in this column. Clicking it will show each appointment on individual rows. | |
| Jabber | Status icon from the application Jabber. | Double click the icon to start a Jabber chat with the user. |
| Jabber status | Text description of the user's Jabber status. | |

| | | |
|---|---|---|
| Keywords | Keywords related to the user. You can find the user by searching for these keywords instead of just searching for the contact information. | *You can add or remove a user's keywords by editing the user. See section 7.2.* |
| Line status | Status icon for the user's phone. | Double-click the icon to call the user's phone. If the phone rings, you can double click the icon to answer the call for the user. |
| Lync | Status icon from the application Lync. | Double-click the icon to start a Lync chat with the user. |
| Lync Activity | Text description of the user's Lync status. | |
| Lync Location | The user's location as entered in Lync. | |
| Lync number | The user's Lync number. | Double-click the number to call it. |
| Managed by | The user's manager. | |
| Mobile | The user's mobile number. | Double-click the number to call it. |
| Mobile status | Status icon for the user's mobile. | Double-click the icon to call the user's mobile. |
| Name | The user's name. | *If you have selected a group, the name of the group will be displayed in parentheses in the top of this column (see section 7.1 for more details). You can sort users by name, both ascending and descending, by clicking the column header or with a shortcut configured in Settings.* |
| Note | Note attached to the user containing information that other users should be aware of. | *You can enter a note for a user by editing him/her. See section 7.2 for more.* |
| Office name | The user's office name. | *You can sort users by office name by clicking the column header or with a shortcut, if this has been configured in Settings.* |
| Office phone | The user's office phone number. | Double-click the number to call it. |
| Organization | Organization group this user is member of. | *You can sort users by organization by clicking the column or with a shortcut if configured in Settings.* |
| Sametime | Status icon from the application Sametime. | |
| Short number | The user's short number. | Double-click the number to call it. |
| Subject | The subject of the user's current calendar appointment. | |

| | | |
|---|---|---|
| Title | The user's title. | |
| Unified Presence | Summary of a user's status. | *In Settings, you can choose which kinds of status should be used to show that a user is busy. See section 11.6 for more.* |

# Appendix B: Icons in the Time Component

The status icons specifically used in the Zylinc desktop applications are covered below. For a description of the status icons used by **Lync**, **Sametime** and **Jabber**, refer to the manuals for these products.

## B.1 Line Status

**Line status** shows the status of a user's phone. By hovering the cursor above the icon in the Time component, more information appears, such as whom the user is talking to, if he or she is busy.

The user is not on the phone and is ready to answer a new call.

The user's phone is ringing.

The user has enabled Do Not Disturb.

The user is talking.

The user has a call on hold.

The user does not have a phone connected.

The user's calls are being forwarded.

The user's calls are being forwarded due to a calendar appointment.

The user's calls are permanently forwarded.

## B.2 Mobile Status

**Mobile status** shows a user's status on his/her mobile. Like **Line status**, you can view further information about the call by hovering the cursor over the icon in the Time component.

The user's mobile is idle and ready for a new call.

The user is talking.

The user has enabled Do Not Disturb.

The user's mobile is offline.

The user is abroad (roaming). This icon is shown on top of the user's mobile status.

## B.3 Unified Presence

**Unified presence** is a user's status summary, so you quickly can tell whether the user is available or not. This means that you do not have to take a look at all the individual status columns.

The user is available and can be contacted.

The user is busy.

The user is away.

# Appendix C: Numeric Codes

This list provides an overview of all search categories and their numeric codes.

| Code | What you want to search for |
|---|---|
| 1 | Display name |
| 2 | Name |
| 3 | Surname |
| 4 | Office phone |
| 5 | Mobile |
| 6 | Department |
| 7 | Country |
| 8 | City |
| 9 | Alias |
| 10 | Email address |
| 11 | Group |
| 12 | Keywords |
| 13 | Subject |
| 15 | Office |
| 16 | Company |
| 17 | Title |
| 18 | Managed by |
| 19 | Phone number (automatically searches these numeric codes: 4, 5, 22, 24, 25, 26, 27) |
| 20 | State |
| 21 | Address |
| 22 | Short number |
| 24 | Pager |
| 25 | Fax |
| 26 | Home |
| 27 | Lync number |