



4059EE With Tellus PAM

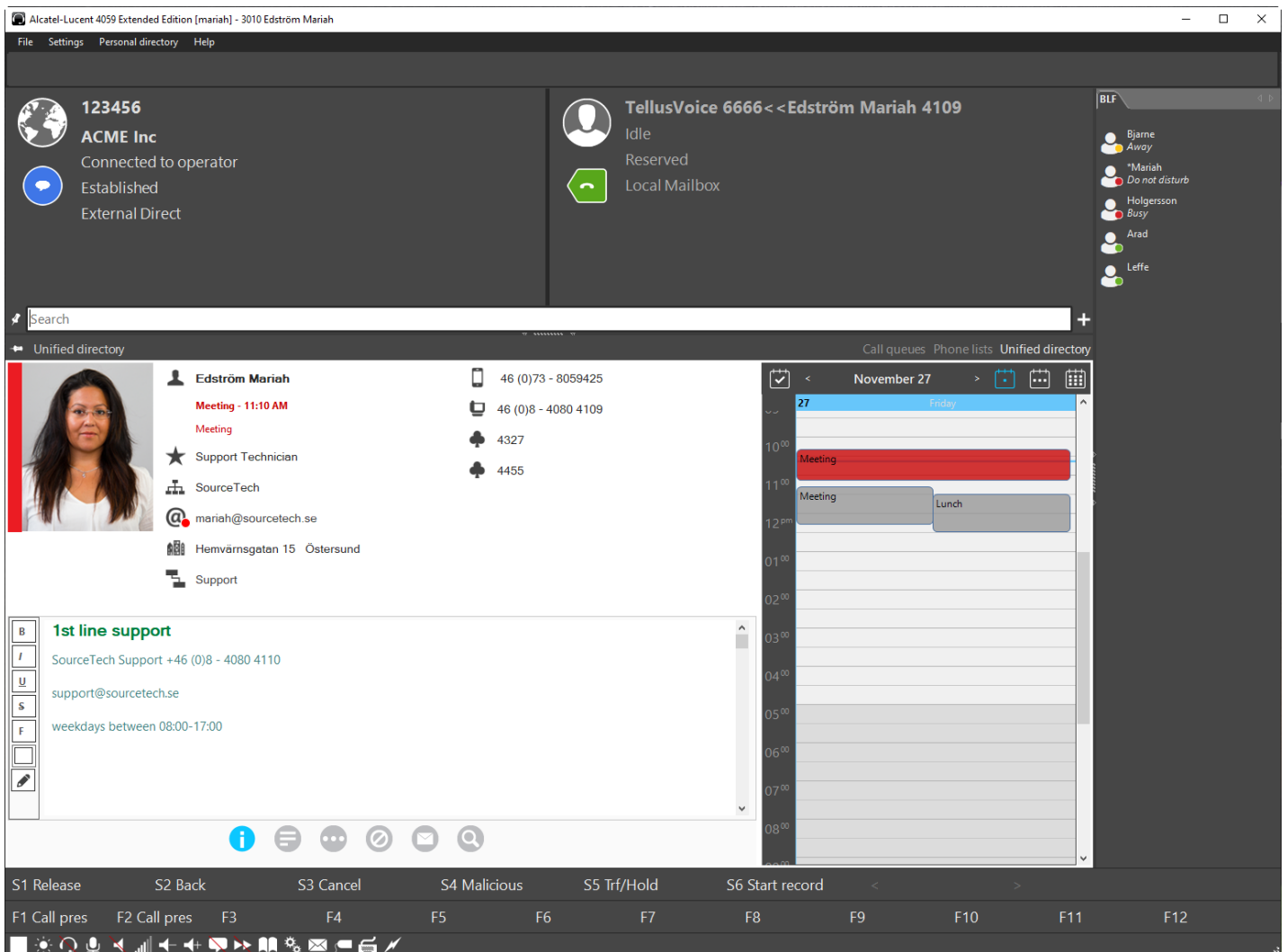
User manual



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4059EE With Tellus PAM



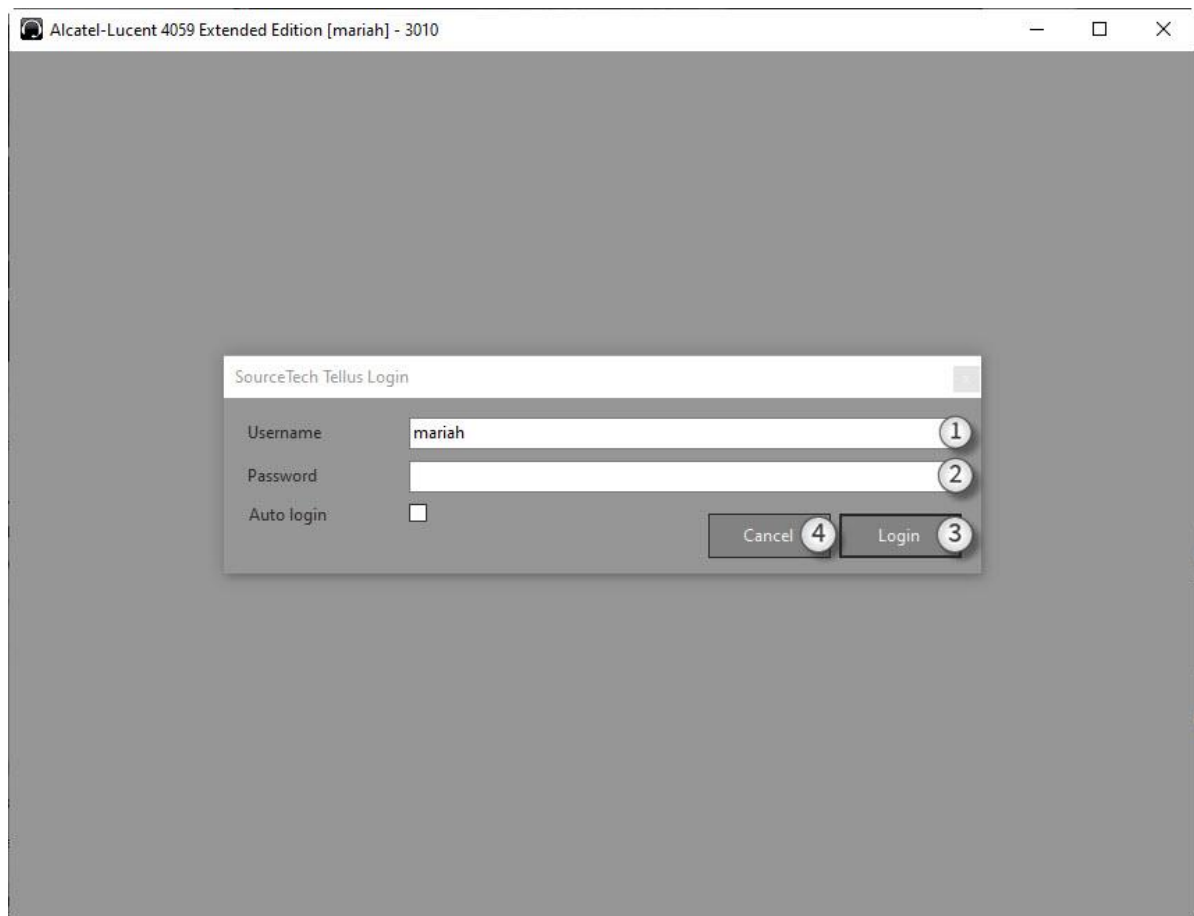
4059EE is a modern operator application and Tellus PAM will give the operators a powerful tool for the everyday work.

This user manual is an appendix to 4059EE Operator Manual.

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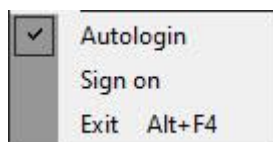
Login



**Note that you need to run the application as an administrator to be able to change the system settings.*

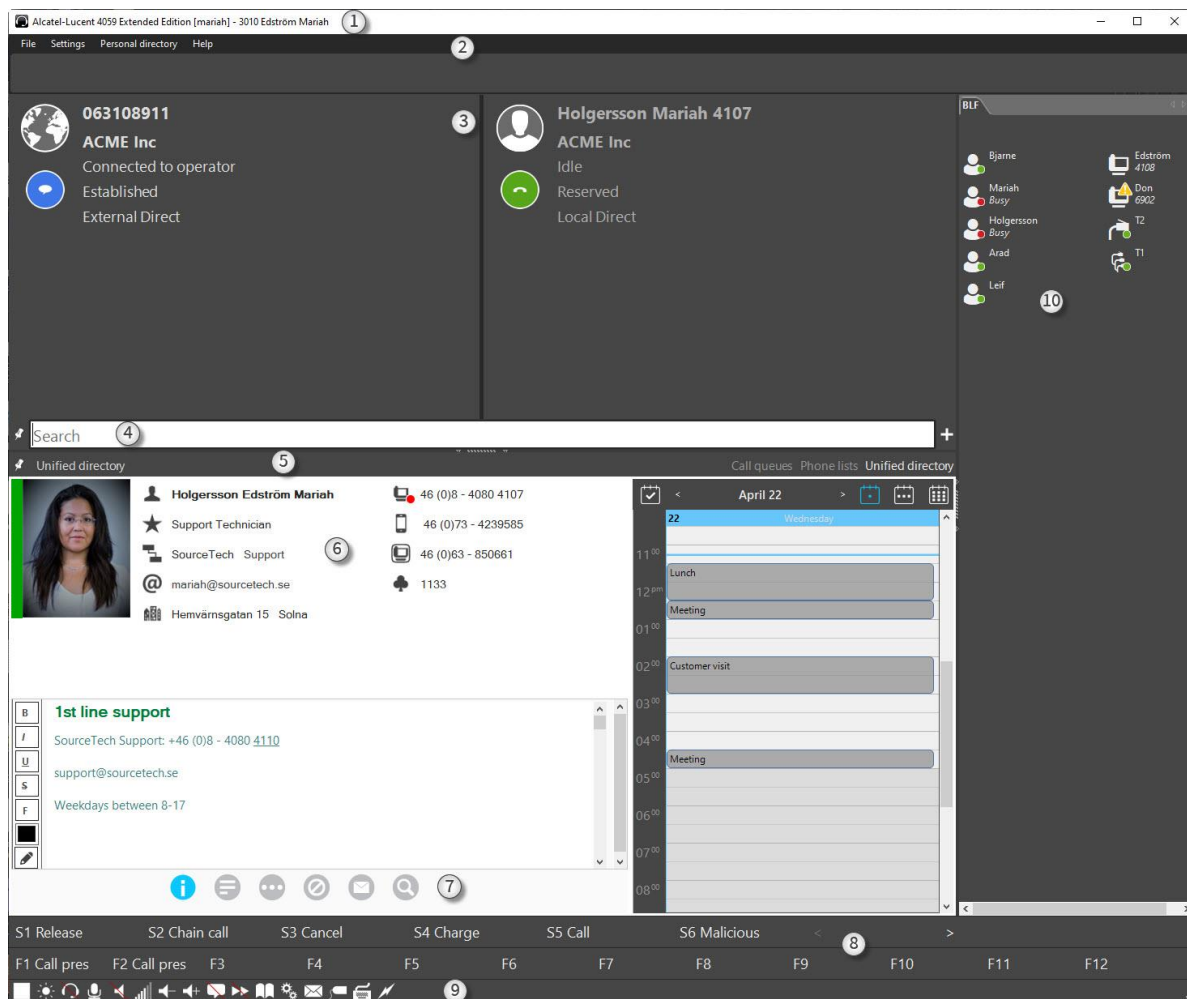
1. Select user in the drop list.
2. Enter your password.
3. Press the Login.
4. Press the Cancel button if you want to cancel the login.

Auto login – Tick the box to use auto login



If the autologin is not to be used, press File in the application menu and uncheck the Auto login choice.

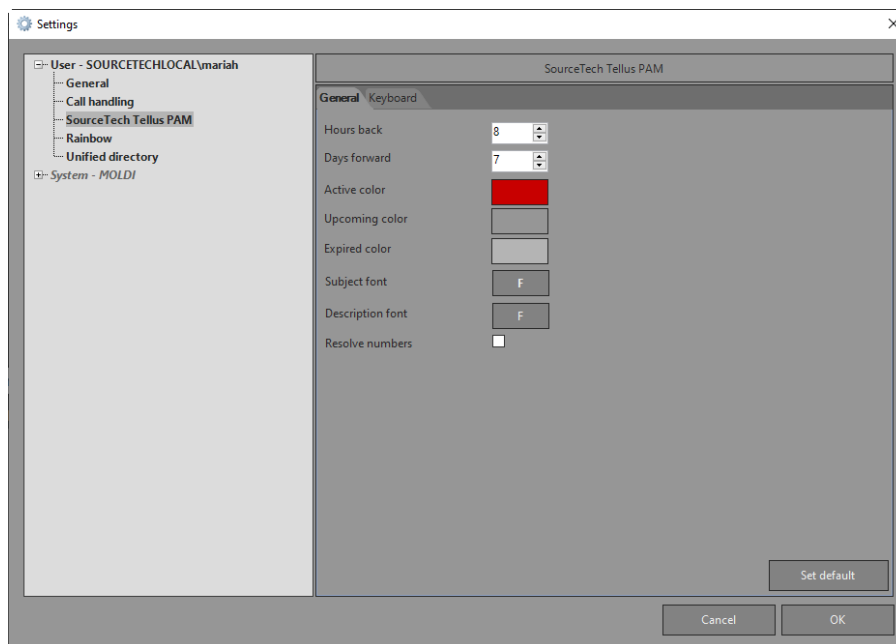
Overview



Depending on version, plugins etc. the appearance can vary.

1. At the top of the application window you can see which user is logged in as an operator and with which extension number.
2. In the menu you will find settings for the application.
3. When you have an active call, the information about the active call will be displayed in this section.
4. Use this box to perform a search. You can temporarily change this by using down arrow on your keyboard. You can also add more search fields with the plus. Save the search fields you want by using the "Pin" to the left of the search field.
5. Here you can select the display window you want to see.
6. In the middle section you will see details of the searched user.
7. Below user details are tabs that contain additional information about the user.
8. These buttons are dynamic and are used in call handling. You can read more below section on call handling.
9. These buttons are used to launch the application, change the volume or to access settings.
10. At the right side, the Busy Lamp Field is located, here you can monitor users, extensions, trunk lines and trunk groups.

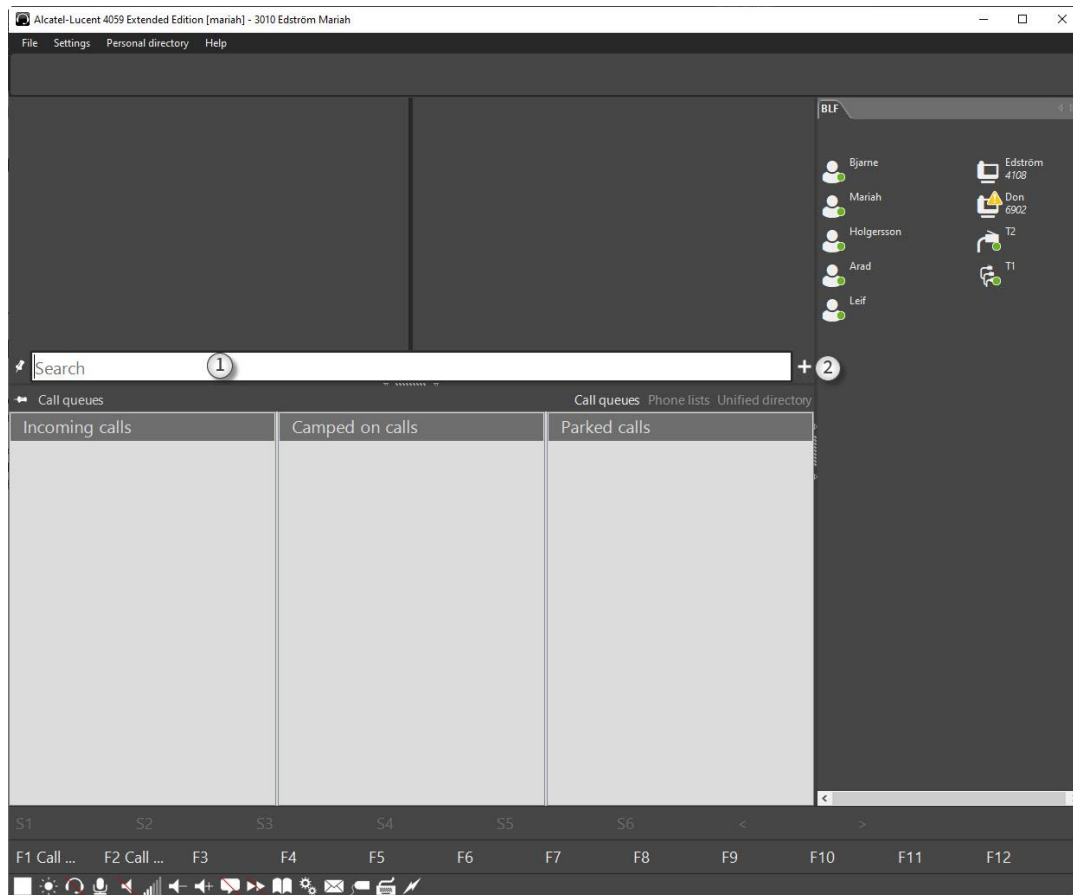
PAM settings



You will find all settings under Settings – show settings
















1. Select for how many hours back old absences should be visible.
2. Select how many days in advance absences should be displayed.
3. Colors in the application is adjustable.
Click on the color you want to change and set a new color in the dialog that appears.
4. Resolve numbers - When this is unchecked, name/number look up are not made. This is default set to false.
5. Set default - Press this button to revert your changes to the original settings.

Search



1. By default, only one search field is present, this is the field Search. Search is a search type that combines all the available search fields. With this search type, you can make a global search, instead of having one search type per field.
2. Search field(s) can be added. To add a field, click the "add" sign located at the right side of the current search field. Chose the search criteria from the dropdown displayed (the type Search is only available in the first search field). Use the pin, at the left side of the first search field, to save the field. If this is not done the field will be removed when the search is cleared with [Escape] or a person's details are displayed.

Result list














Unified directory										
Status	Name	Phone	Company	Pager	Department	Email	Number	Title	Location	Options
	Andersson Leif	4232	SourceTech		Marketing	leffe@sourcetek.se		Owner	SourceTech HQ	
	Berglund Christina	46 (0)8 - 4087 6305	SourceTech			christina@sourcetek.se			Solna	
	Beställning Prompt	46 (0)8 - 4080 4115	SourceTech		Marketing	marknad@sourcetek.se				
	Dahl Elin	46 (0)8 - 4080 4265	SourceTech		Support	es@sourcetek.se		Organisation M...	Solna	
	Edström Mariah	46 (0)8 - 4080 4109	SourceTech	4455	Support	mariah@sourcetek.se		Support Techni...	Östersund	
	Forum SourceTech		SourceTech			sourcetekforum@sourc...			Solna	
	Genovese Vito	46 (0)8 - 4087 6306	SourceTech		R&D	vito@sourcetek.se		Customer Care ...		
	Heisner Nathalie	46 (0)8 - 4080 4206	SourceTech		Marketing	nathalie@sourcetek.se		Key Account M...	SourceTech HQ	
	Hoffa Jimmy	46 (0)8 - 4080 8989	SourceTech		R&D	jimmy@sourcetek.se	46 (0)8 - 90510	Chairman	Solna	
	Holgersson Edström Mariah	46 (0)8 - 4080 4109	SourceTech	1144	Support	mariah@sourcetek.se		Support Techni...	Solna	
	Ingelsson Bjarne	46 (0)8 - 4087 6306	SourceTech		R&D	bjarne@sourcetek.se		Developer	SourceTech HQ	
	Jacobsson Anna	46 (0)8 - 4080 4265	SourceTech		Support					
	Konf Jupiter	46 (0)8 - 4080 4119	SourceTech			jupiter@sourcetek.se			Solna	
	Sourati Arad	46 (0)8 - 4080 4103	SourceTech		Support	arad@sourcetek.se		Support Techni...	Solna	
	Support SourceTech		SourceTech		Support	support@sourcetek.se				

If the search results in multiple hits, this will be displayed in a list. To see more information and details about a user, double-click or use the enter key on your keyboard. You can navigate the list using the arrow keys.

You also see if the user is present (green) or absent (red) directly in the list.

 Present

 Absent

Status	Name	Phone	Title	Department	Pager	
	SourceTech AB					
	Leffe Andersson	4111				
	Andersson Leif	46 (0)8 - 4080 4111	Owner	Marketing		
	Beställning Prompt	46 (0)8 - 4080 4115		Marketing		
	Dahl Elin	46 (0)8 - 4080 4265	Organisation Manag...	Support		
	Edström Mariah	46 (0)8 - 4080 4109	Support Technician	Support	4455	
	Forum SourceTech					
	Nathalie Heisner	4113				
	Heisner Nathalie	46 (0)8 - 4080 4206	Key Account Manager	Marketing		
	Mariah Holgersson Edström	4109	Support Technician			
	Holgersson Edström Mariah	8989	Support Technician	Support	1144	
	Bjarne Ingelsson	4101	Head of R&D			
	Jacobsson Anna	46 (0)8 - 4080 4265		Support		
	Konf Jupiter	46 (0)8 - 4080 4119				
	Arad Sourati	4103				

If you right-click in the result header, a menu with all searchable columns is displayed. Just click on the columns you want to add or remove.

The order of the fields can be arranged, this is done by dragging the column to wanted location.

You can resize the columns by dragging the pages of the column. The result can be sorted by ascending or descending by clicking on one of the column headings.

Detailed view

1. User profile information: Edström Mariah, Support Technician, SourceTech, mariah@sourcetechn.se, Hemvärmagatan 15 Östersund, Support. Phone numbers: 46 (0)73 - 8059425, 46 (0)8 - 4080 4109. Active absences: Meeting - 2:10 PM (2:25 PM), Demo for customer.

2. 1st line support information: SourceTech Support +46 (0)8 - 4080 4110, support@sourcetechn.se, weekdays between 08:00-17:00.

3. Calendar view for November 26, Thursday. Events: Coffee Break, Meeting Demo for customer, Calendar Planning.

Once you have selected a user in the search list and clicked enter or double-clicked, you will get a detailed view with extended information about the user.

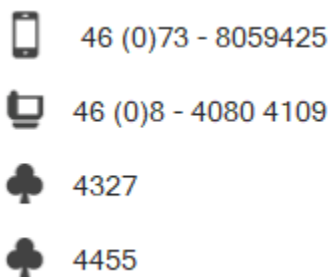
To refresh the view, you can click on the user's name. All information in the top part is clickable and a search will be made if you click it.

If you click on a phone number, the application will send the phone to the call handling window and clicking on the email address will open your default email client.

1. In this part you will see the user's status and picture. The bar to the left of the picture shows the users status right now. If the user is present the bar will be green.
2. The information about the active absence or if there is an upcoming absence will be shown here. Mariah has two absences, the first can we see that her meeting will end at 2:10, but after we can see that she has another "actual return time" which is when the next absence ends.

3. The information in the upper middle part is organizational information. Title, organization, location is displayed here. All this information is clickable which makes it easy to find a replacement if this user is unavailable.
4. The calendar view on the right is a graphical view of the users upcoming day. You can choose between day, week, and month view. By clicking on the calendar icon in the top you can choose a different date to see how the absences are on that day.
5. In the bottom part there are different panes depending on the plugins in the application. With the PAM system you will get Operator information, keywords, custom data, absences, messages.

Call the user



If you know the user's extension number, you can call the user from the search field. Just enter the extension number in the search field and press enter (remember to use the enter button that is located on the numpad on your keyboard, to the far right).

Another way to call the user is to do a search on the user's name and select the user in the list then press F12 on your keyboard.

You can also call a user by clicking on the phone number in the detailed pane or press F12. F12 will call the first number in the list and if you want to call the users associated mobile you can use the combination shift + F12.

Operator information

Edström Mariah
Meeting - 2:25 PM
Sale meeting
★ Support Technician
SourceTech
@ mariah@sourcetechn.se
Hemvärnsgatan 15 Östersund
Support

1st line support
SourceTech Support +46 (0)8 - 4080 4110
support@sourcetechn.se
weekdays between 08:00-17:00

Information that can be useful for operators, but that other users should not have access to, can easily be added in the operator application. Search for a user and in the detailed pane the operator information is located under the first bullet. If you want to modify the information you simply put focus in the text box and edit/add the information you need.

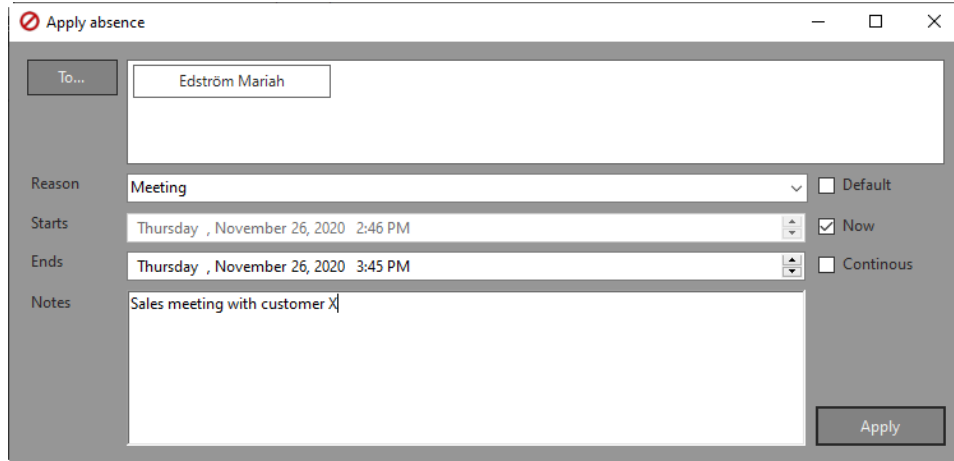
Presence and absence

To notify operators, colleagues, and customers where you are and when you will be back, all users can manage their absences in Tellus Web. The operator can manage all absences in the 4059EE.

Meeting 1:20 PM 1:26 PM
Meeting HQ
Meeting 1:50 PM 2:25 PM
Sale meeting
Calendar 2:50 PM 3:40 PM
Planning
Meeting Tomorrow 10:20 AM Tomorrow 11:10 AM

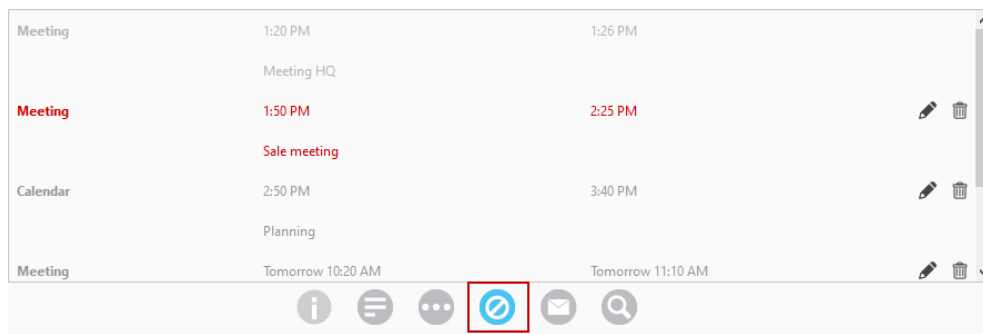
Add absence







To add an absence to a user, start by searching for a user and go into the detailed view and press F8. The apply absence dialog becomes visible. Here you select to, reason, start and end time. You can also add notes for information.



The 'Apply absence' dialog box is shown. It has a title bar with a red prohibition icon and the text 'Apply absence'. The main area contains a 'To...' button and a text field with 'Edström Mariah'. Below this are fields for 'Reason' (set to 'Meeting'), 'Starts' (Thursday, November 26, 2020 2:46 PM), and 'Ends' (Thursday, November 26, 2020 3:45 PM). There are checkboxes for 'Default', 'Now', and 'Continuous'. A 'Notes' text area contains 'Sales meeting with customer X'. An 'Apply' button is at the bottom right.

More users can be added by pressing To. A new dialog is shown where you can search and add more users. The name of the selected users is shown on the top and all will get the same absence reason.



Meeting	1:20 PM	1:26 PM	
	Meeting HQ		
Meeting	1:50 PM	2:25 PM	 
	Sale meeting		
Calendar	2:50 PM	3:40 PM	 
	Planning		
Meeting	Tomorrow 10:20 AM	Tomorrow 11:10 AM	 

At the bottom of the table is a row of icons: an information icon (i), a list icon (≡), a more options icon (⋮), a blue circle with a white 'x' icon (highlighted with a red box), an email icon (✉), and a search icon (🔍).

To edit an absence, simply click on the row that represents it and edit the information.
To remove the absence, click on the trash can.

Messages

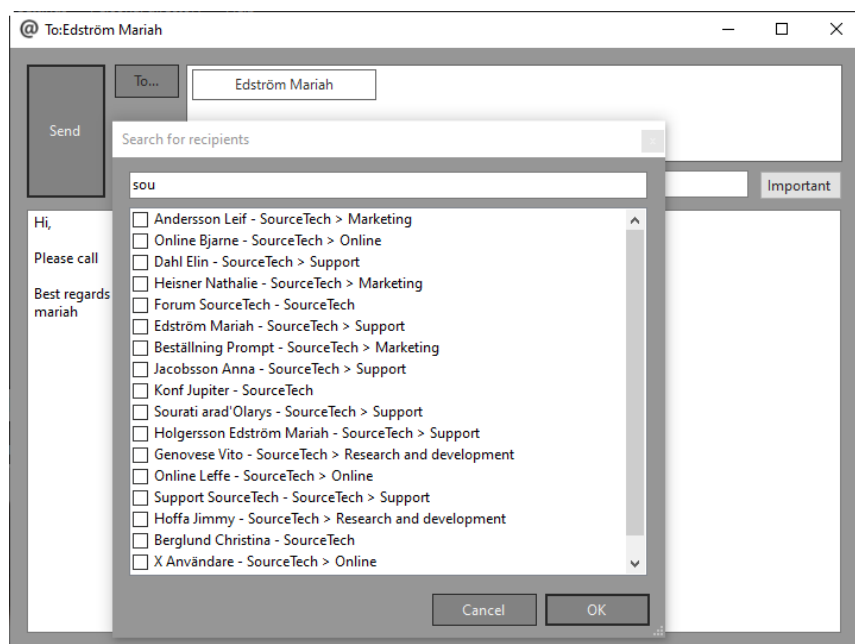
The operator can easily send messages to one or more, press F11 and the message dialog is shown. All messages will be sent to the web client in addition to other message channels.

The screenshot shows a message dialog window with the following components:

- To...** field: Edström Mariah (labeled 1)
- Subject** field: Message from the operator (labeled 2)
- Message Body** (labeled 3):
Hi,
Please call Bjarne on 46840804100, to confirm meeting.
Best regards
//Arad
- Buttons**: Send (left), Important (right)

1. In this list you will see the recipients of this message. If you want to remove a user from this message, press the X next to the name.
2. Enter a subject. (If you have set a message template this field will be filled out with your default subject).
3. Enter your message. (If you have set a message template this will be filled out with you default message).
4. The message will always be sent as an Tellus message that can be read in the web client. You can choose to send the message as an email. Email is depending on that there is an email address entered in Tellus

Send messages to several recipients



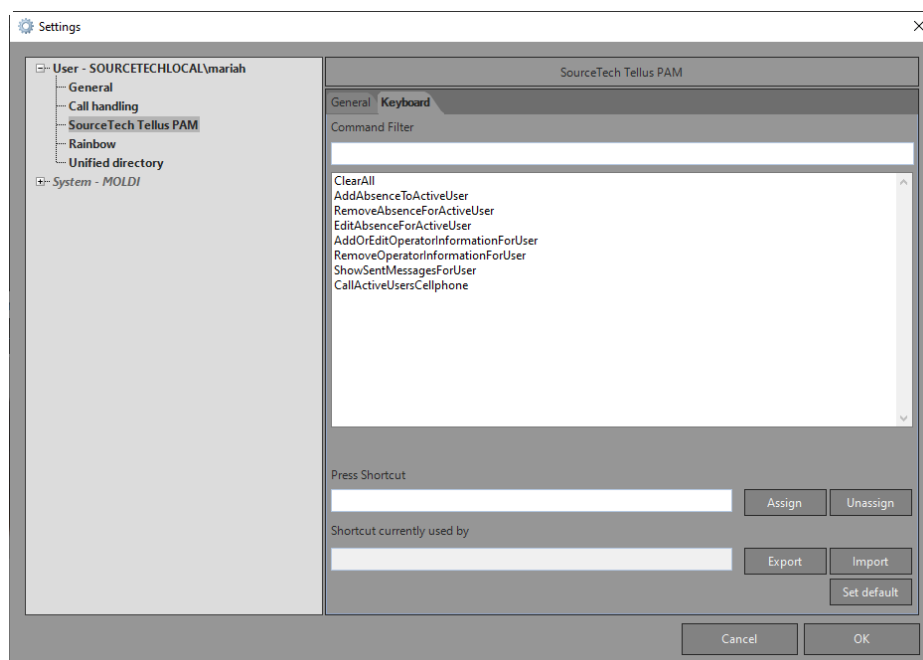
It is easy to send messages to several recipients. Start by opening the message dialog.

Press the "To" button.

This will open another dialog where you can search for the recipient.

Tick the boxes of those users you want to add to the recipient list and press OK to close the dialog when you are done.

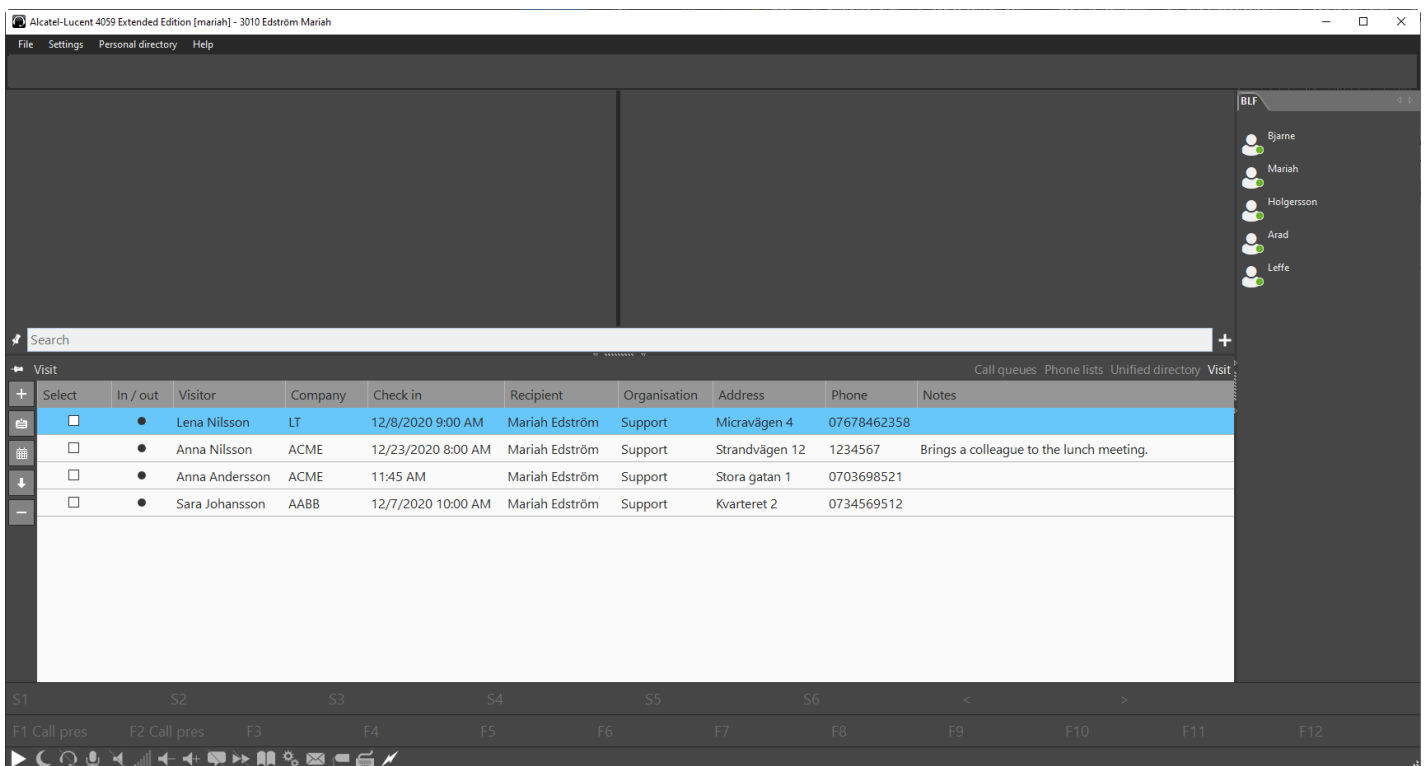
Program keyboard shortcuts for Tellus PAM



This is where you create shortcuts for, e.g. set absence, send message.

You will find these settings under Settings - Show settings. SourceTech PAM and the tab Keyboard.

Appendix A – Tellus Visit



In the visitor management, you can enter the organization's visitors. You can choose to register an individual visitor or an entire group.

When the visit arrives, the visit is checked in at the reception through a visit terminal or through the operator.

Tellus Visit system is a 4059EE plugin.

Visit Setting

Settings

User - SOURCETECHLOCAL\mariah

- General
- Call handling
- SourceTech Tellus PAM
- Rainbow
- Unified directory
- System - MOLDI

SourceTech Tellus PAM

General Keyboard Visit

Printer

Category

Arrival

08:00

Auto checkin offset

5

☐ Print label on checkin ☒ Notify recipient on checkin

Cancel OK

Printer – select printer from the drop list.

Category - Select the appropriate category.






Arrival – Set a predefined arrival time.

Auto check in offset – Select in minutes if the visitor should be checked in automatically when register.

Print label on checkin - If a label is to be printed automatically at check in.

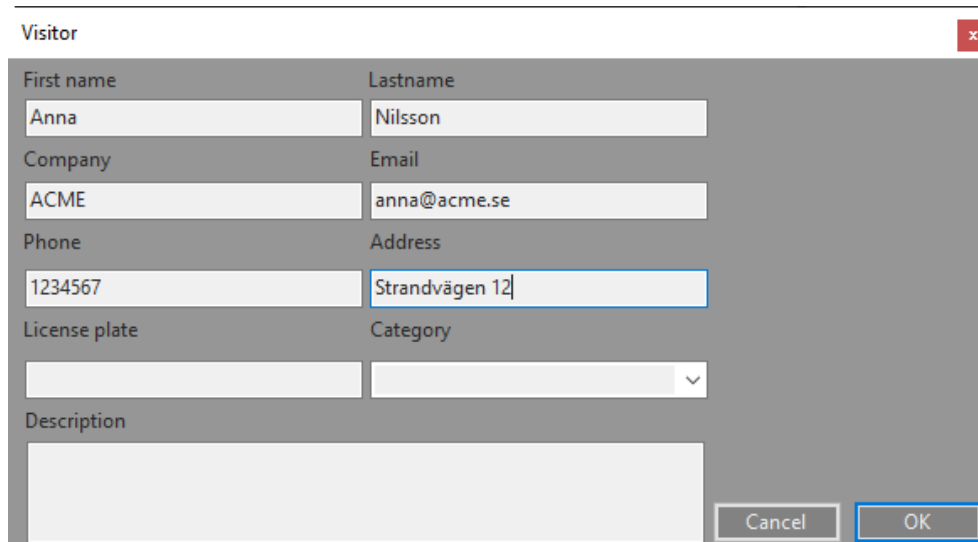
Notify recipient on checkin - Check If a notification should be sent to the recipient.

Visit

-  Add new visit
-  Show all visits
-  Show today's visit
-  Show checked-in visits
-  Purge checked-out visits

Add a visitor

Press the plus sign on the left, to get the visitor dialog.

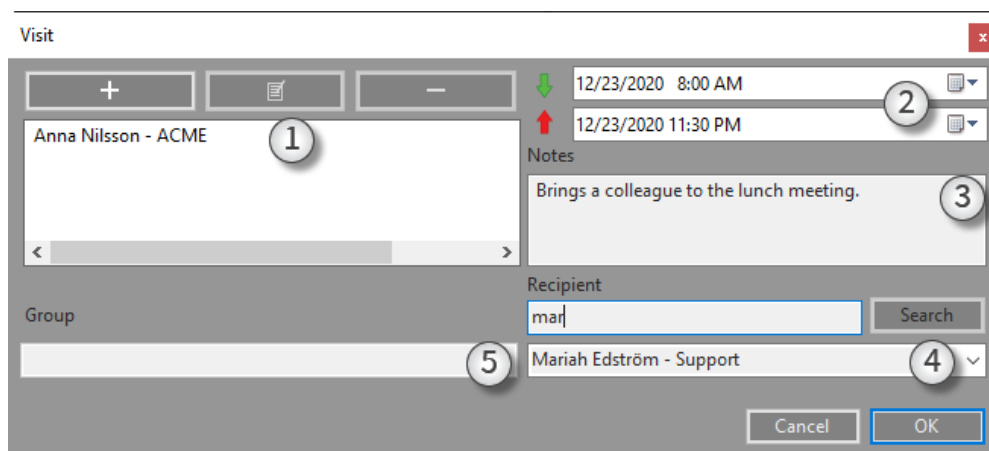


A dialog box titled "Visitor" with a close button (X) in the top right corner. The form contains the following fields:

First name	Anna	Lastname	Nilsson
Company	ACME	Email	anna@acme.se
Phone	1234567	Address	Strandvägen 12
License plate		Category	
Description			

At the bottom right are "Cancel" and "OK" buttons.

Enter information about the visitor and press ok.



A dialog box titled "Visit" with a close button (X) in the top right corner. The form contains the following elements:

- Buttons: +, Edit (pencil icon), -
- Visitor list: Anna Nilsson - ACME (1)
- Check-in/out times: 12/23/2020 8:00 AM (2) and 12/23/2020 11:30 PM (2)
- Notes: Brings a colleague to the lunch meeting. (3)
- Recipient search: Search bar with "mar" (4) and a dropdown showing "Mariah Edström - Support" (4)
- Group: Empty field (5)

At the bottom right are "Cancel" and "OK" buttons.

After pressing Ok, a visit dialog is shown, here you add information about the visit.

1. Press the plus sign to add a new visitor
 - To edit the information about the visit, press edit
 - To delete, press the minus sign
2. Enter date, check-in time and check-out time
3. Notes can be added.
4. Search and add recipients to the visit