

Panasonic

Quick Reference Guide Communication Assistant Client

Model No. **KX-NCP/KX-TDE Series**
KX-NS Series



Thank you for purchasing this Panasonic product.
Please read this manual carefully before using this product and save this manual for future use.

Communication Assistant: Version 4.2 or later

In this manual, the suffix of each model number is omitted (e.g., KX-NCP500**NE**).

Introduction

Communication Assistant (CA) Client is a Computer Telephony Integration (CTI) application that integrates with your Panasonic PBX, and allows you to perform various telephone operations from your PC.

About the Quick Reference Guide

This Quick Reference Guide is designed to serve as an overview of the features, setup and installation of CA Client.

The Quick Reference Guide is divided into the following sections:

1 Features

This section provides general information about the features in CA Client.

2 System Connection Diagram

This section shows how CA Client fits into your network.

3 System Requirements

This section provides the minimum and recommended system requirements for installing CA Client on a PC.

4 Software Installation

This section explains how to install and uninstall CA Client.

CA Server

CA Server is a separate program that, when installed on your network, enhances the features of CA Client. Settings for CA Server can also be managed on any computer on the server's network via a web browser, using the CA Web Manager client. For more information about CA Server, contact your dealer.

Note

CA Server version 4.2 or later is required for users to log in with CA Client version 4.2.

IMPORTANT

CA Client stores personal information. In order to prevent data theft and leakage, we recommend the following:

- Set a password-protected screensaver to activate after your computer has been idle for a set amount of time.
- Use Windows Update to keep your system up-to-date with the latest software patches.
- When users change extensions, desks, etc., make sure that the access rights for their previous and new extensions are correct.
- Set a login password that is at least 5 characters long, and contains a combination of letters and numbers.
- Periodically change all login passwords to prevent unauthorised access by third parties.
- When the computer used for CA Client is transferred, disposed of, or taken out of service, ensure all sensitive data is securely erased.

Notice

- If an older version of CA Client is installed over a newer version, the software may not function properly. If you want to downgrade your version of CA Client, uninstall the current version, and then install the older version.
- Some call features may not be available, or some interface buttons may not display when using CA with certain telephone models.
- When using CA Client, be sure the system display font is set to normal size (96 dpi).
- When you uninstall the CA application, the Licence Registration Keys of IP Softphones will be deleted. Please make a record of the Licence Registration Keys of IP Softphones before you uninstall the CA application.
- The use of this Software may be limited under the terms of the licence agreement for your system. Please confirm the terms of your licence before using this Software.

Note

The contents and design of the software are subject to change without notice.

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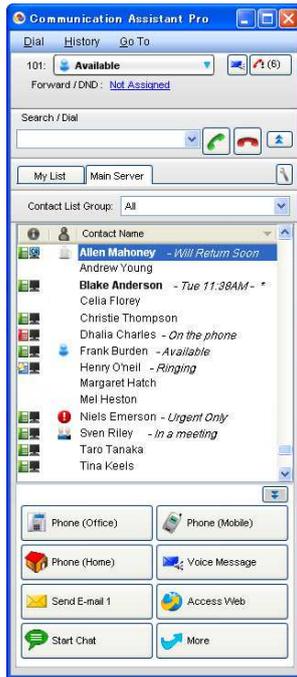
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1 Features

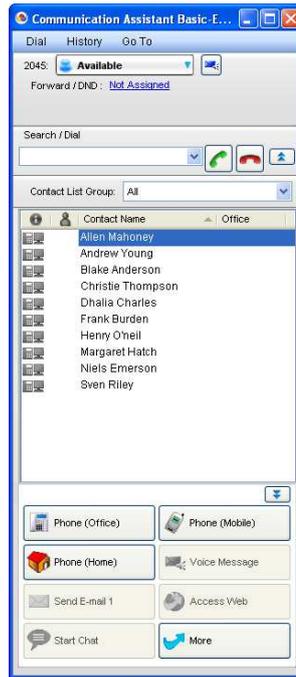
Contact List with Presence

You can easily make calls using a customisable contact list that is displayed on your PC, and search for a desired contact simply and quickly. You can also see the phone status, PC status, and the absent message of other extensions from the contact list before you make a call.

CA Client Pro Contact List



CA Client Basic-Express Contact List



Presence Window



- When you receive a call, information about the caller is displayed if it is registered in the contact list.
- You can set your presence to display an absent message of the current date and time, after a specified amount of time has passed with no operations being performed. This can be enabled in **Options** from the Absent Message drop-down list.
- The PC icon in the contact list shows the login status of other CA users:
 - : The user is logged in.
 - : The user is logged in, but the auto absent message has been set.
 - : The user is not logged in, or the status of the contact could not be confirmed over the network.Presence is not displayed for users of CA Basic-Express; the contact entry must be opened to check the extension's presence.
- Each PBX in your network has a tab above the contact list with that PBX's contacts. Click a tab to view that PBX's contacts.
- Multiple contacts can be selected at once for performing operations such as copying, deletion, etc.

Note

- You can set which PBXs networked through CA Server are displayed as tabs. From the **Go To** menu, select **Option**, then **Network Server**. Tabs for up to 7 other PBXs can be displayed.
- Basic-Express users cannot use contact list tabs.

One-look Networking (KX-NS1000 PBXs only)

A One-look network is where multiple KX-NS1000 PBXs in multiple locations are connected and managed over an IP network. One PBX serves as the Master unit, which controls one or more PBXs, known as Slave units. With CA Client, the contacts in a One-look network can be viewed by all users of PBXs within the One-look network. However, to view the contacts of other PBXs outside of the One-look network, the PBXs must be connected to a CA Server. For details, see the CA Server Quick Reference Guide.

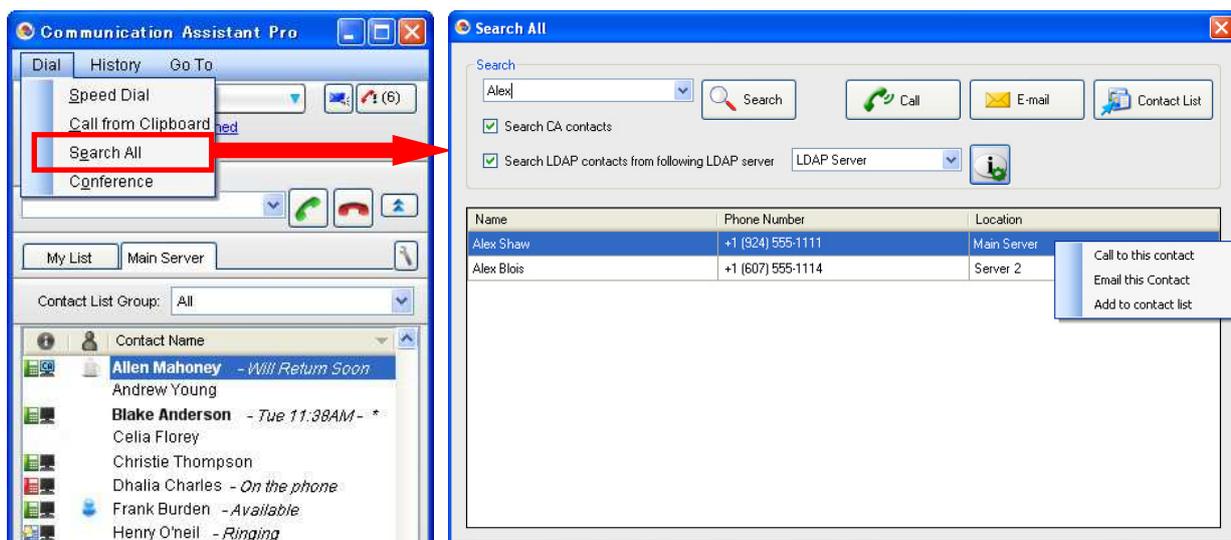
Searching for Contacts

When many contacts are displayed at once, you can narrow down the list of displayed contacts by entering a name or part of a name into the search box.



Search All Contacts

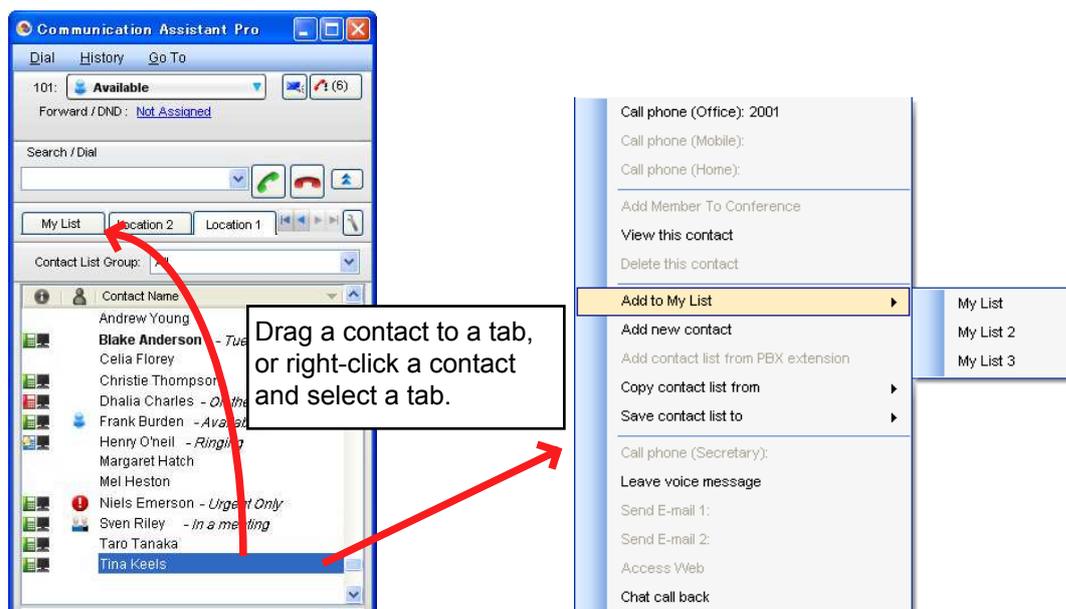
Choose **Search All** from the **Dial** menu to search all PBX contact lists as well as your network's LDAP directory. Enter a name or part of a name and click **Search**. From the search results, you can make a call or add an LDAP directory member to your CA Client contacts.



This feature supports LDAP v3 compliant databases (e.g. Microsoft® Active Directory®). However, this feature may not work with some LDAP compliant databases, depending on the database's specifications.

My List

If CA Server is installed on your network, you can personalise which contacts to display in the contact list using the My List function. My List is a convenient way to manage and display contacts that you communicate with most often. Just drag and drop any contact from a PBX's contact list onto a My List tab. You can also right-click a contact and select **Add to My List**.



You can create multiple My List tabs to further organise your contacts. A maximum of 5 different My List tabs can be created, with up to 128 contacts per tab.

Contact Lists with CA Server

If CA Server is installed on your network, multiple users can share common contact lists. Common contact lists can be modified using the CA Web Manager of CA Server. When CA Client users log in to CA Server, the latest common contact lists are received from CA Server. Common contacts are displayed in your contact list enclosed by square brackets (example: "[Accounting Department]").

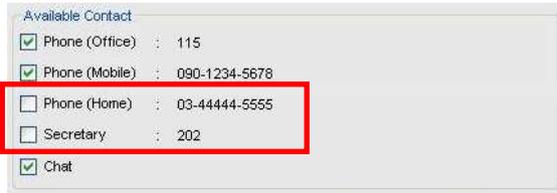


Restricting Contacts by Presence

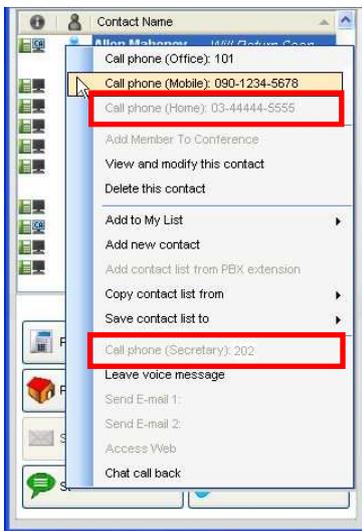
If CA Server is installed on your network, you can restrict which of your contacts are available to be called by other CA Client users, according to your presence.

Example

In one of your presence settings, Phone (Home) and Secretary are unchecked.



When that presence is set, those contacts are unavailable to be called by other CA Client users.



Network Features

If CA Server is installed on your network, you can make or transfer calls to users of other networked PBXs after confirming their presence from the contact list. You can also chat with users of other PBXs. Each computer that will use network features requires a network activation key.

- To connect to other networked PBXs, the other PBXs must be using CA Server version 3.0 or later.
- CA Basic-Express users cannot use network features.

Outgoing Calls from Outside the Office

If CA Client Pro is installed on your laptop PC, you can call cellular phones or land line phones from the CA Client Pro via the KX-NS series PBX.

To use this feature, your extension must have "Transfer to CO" enabled in its COS settings.

1. Click **Phone Number** on the CA Client Pro main screen.
2. Select one of the items below.
 - Phone (Mobile)
 - Phone (Home)
 - Custom Phone Number

3. Click **Call**.

The PBX calls the selected phone.

4. Go off-hook on that phone, and then dial the destination number or select the destination in the contact list.

5. Talk.



You can access the VM or UM system by pressing the Message Waiting button. You can also access the UM system by using Microsoft Outlook integration.

Listening to UM/VM voice messages

- Click the Message Waiting button to use your phone to listen to a message in the message waiting list.
- Listen to voice messages using Microsoft Outlook (UM only). See **Microsoft Outlook Integration** for details.

Note

- When using this feature to check waiting messages, the Message Waiting button stays on red even if all messages are listened to.
- The "Call Back with Phone" operation of Microsoft Outlook integration cannot be used while the "Outgoing Calls from Outside the Office" feature is active.

Microsoft Exchange Server Integration

If CA Server is installed on your network, you can integrate a Microsoft Exchange calendar with CA Client. When Microsoft Exchange Server is integrated with CA Client, your presence will automatically change according to the contents of your Exchange calendar. You can set keywords in your calendar's schedule to change your presence.

For example, you could specify that when the word "meeting" is in your calendar's schedule, your presence would change to "In a meeting". Then, if there is an event named "Monthly meeting" from 10 a.m. to 11 a.m., your CA Client presence will automatically change to "In a meeting" for that time. Afterwards your presence will return to the first presence setting in the drop-down list (by default, "Available").

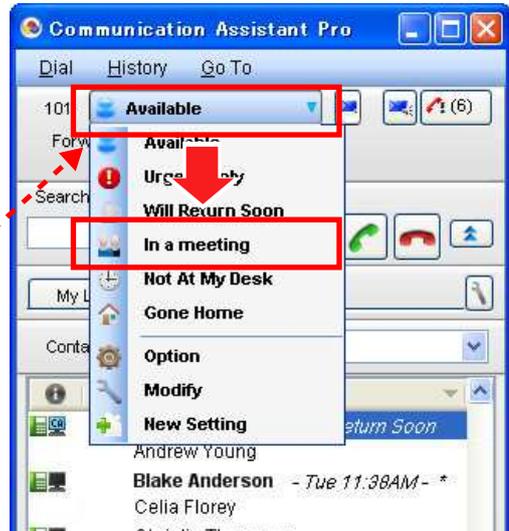
Example of Microsoft Exchange Server integration with CA Client

Microsoft Exchange calendar

9 ⁰⁰	
10 ⁰⁰	
11 ⁰⁰	Monthly Meeting
12 ⁰⁰	
13 ⁰⁰	

Schedule Keyword	Function List Name
meeting	In a meeting
conference	In a meeting
training	Urgent Only

CA Client Exchange integration settings



CA Client presence changes

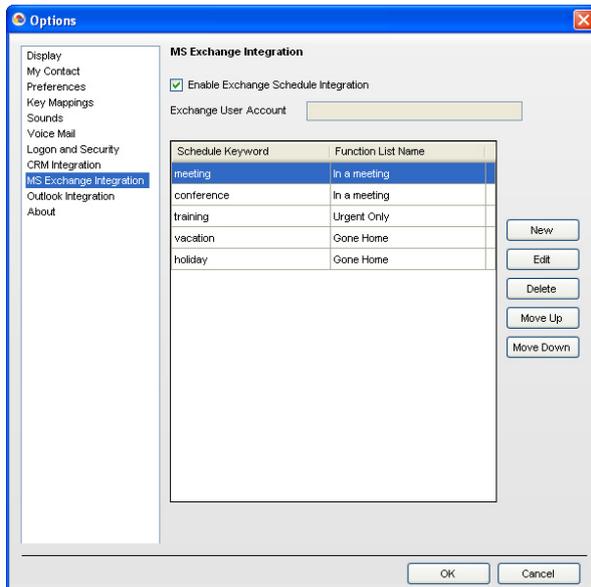
For KX-NS series PBX users, a Personal Greeting set in the Unified Messaging system can be assigned to each presence. The Personal Greeting can be specified in the settings of each presence. Callers redirected to your mailbox will hear the Personal Greeting assigned to the current presence.

Note

Microsoft Exchange Server 2007 and 2010 are supported for this feature. Exchange Server 2003 is not supported.

Exchange integration setup

1. From the **Go To** menu, select **Option**, and then select **MS Exchange Integration**.



2. Check the box for **Enable Exchange Schedule Integration**.
3. In **Exchange User Account**, enter your Exchange user account.
Format: [user name]@[domain name]
For example, if your user name is "user123", and the domain of the Exchange server is "test.panasonic.com", enter "user123@test.panasonic.com".

Note

If the Exchange User Account input area is greyed out, the user name must be entered using CA Web Manager for CA Server. For details, contact your system administrator.

4. Click **New** to add a schedule keyword and associated presence from the Function List. For example, enter the schedule keyword, "meeting" and specify the presence "In a meeting". You can repeat this step to add multiple schedule keywords.
You can create up to 40 keywords. The priority of keywords is determined by their order in the list, from top to bottom. If the text of a scheduled event has more than one keyword, your presence will change according to the highest priority keyword. Select an entry and click **Move Up** or **Move Down** to change its priority, or select an item and click **Edit** or **Delete** to modify or remove entries.
5. Click **OK**.
6. Settings must be made for your Exchange calendar so that it can be viewed by the Exchange server administrator:
 - a. In the calendar view of Microsoft Outlook, in the **My Calendars** column, right-click **Calendar**, and then select **Properties...** from the menu.
 - b. Select the **Permissions** tab.
 - c. Click **Add**. A list of Exchange accounts will be displayed.
 - d. Select the account name of your Exchange server administrator from the list, click **Add→**, and then click **OK**. If you are unsure of your administrator's account name, contact your administrator.
 - e. With the administrator account selected in the **Permissions** tab, change **Permission Level** to **Reviewer**, and then click **OK**.

TAPI Interface

You can make calls directly from CRM (Customer Relationship Management) software using TAPI. CA Basic-Express users cannot use CRM software with CA.

3rd-party CRM Integration

CRM features differ according to the software package used, but some or all of the following features will be available when the software is integrated with CA:

- For incoming calls, a pop-up window with CRM database customer information is displayed according to the caller ID information received by the PBX.
- Calls can be made from CA using the calling functions within the CRM software.

To use these features:

- Dedicated middleware is required.
- CRM software is required.

For information about middleware and supported CRM software types, contact your dealer.

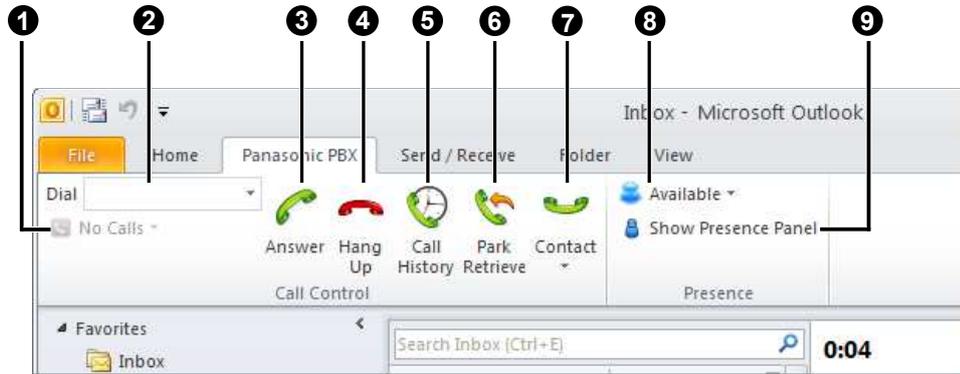
Microsoft Outlook Integration

You can integrate CA Client with Microsoft Office Outlook® 2003/2007/2010. During the installation of CA Client, if you select to add call functions to Outlook, a toolbar will be added to Outlook. The toolbar offers many of the call features of CA Client.

Note

- When you first run Outlook after installing the CA Client toolbar, a dialogue may be displayed asking "Are you sure you want to install this customization?". For the warning, the "From" field will include your local installation path for CA Client. If this dialogue is displayed, click **Install**.
- The following examples are taken from Microsoft Outlook 2010. The display may vary according to your software version and display settings.

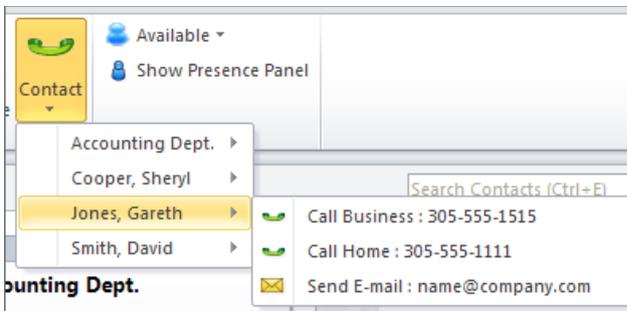
Microsoft Outlook Toolbar



The following CA features can be accessed from Outlook, as shown above. Many of the features are the same as in CA Client.

- 1 Call status of current calls
- 2 Dial box
- 3 Answer
- 4 Hang up
- 5 Call history
- 6 Park retrieve
- 7 Contact list

Click this button to display the contact name and calling options for contacts who match the e-mail address of the currently selected e-mail, or the information of the currently selected contact in Outlook.



You can also double-click a contact in Outlook's contacts to display calling options.

- 8 Presence setting
- 9 Show/hide presence panel

Click this button to show or hide the presence panel. From the presence panel, you can make calls, send e-mails, and start chats with other users. The presence panel can be docked within Outlook, or be set as a free-floating window.



Call Control

Many of the call control features in CA are available from Outlook as well. During a call, the call control bar is displayed.

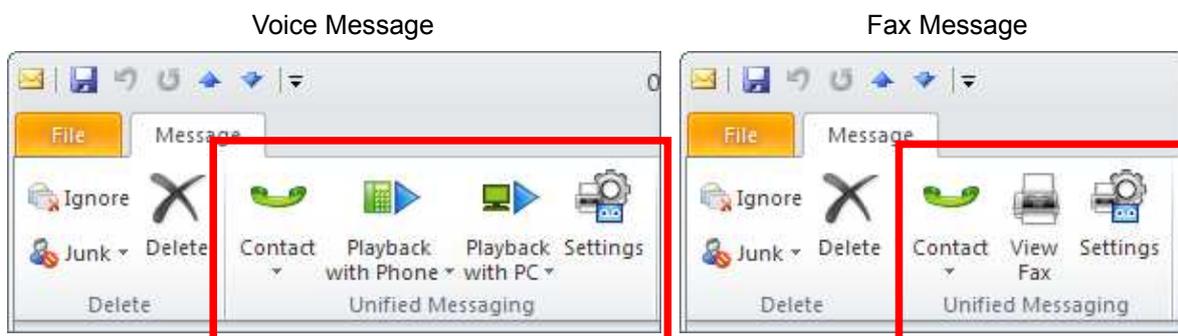


Unified Messaging System Integration (KX-NS series users only)

If you are connected to a KX-NS series PBX, you can also access the following features with Outlook:

- Voice and fax messages can be received directly from the PBX as e-mail attachments by using IMAP to access the PBX's stored Unified Messaging system data.
- Voice messages can be listened to using a telephone or PC.
- Fax messages can be viewed using a PC.
- The message waiting indicator on your telephone will turn off when the mail item is opened in Outlook.
- You can call back the person who left the message or fax if his or her information is available in your contact information, or if a caller ID number is available.

Listening to voice messages and viewing faxes



Note

- For Unified Messaging integration, CA Client must be configured to access the Unified Messaging system. See **Unified Messaging Integration (KX-NS series PBXs only)**.
- A Unified Messaging e-mail activation key (KX-NSU2xx) is required to receive e-mails from the PBX to the mail client.
- **For Microsoft Outlook 2003/2007**
If your installation of Microsoft Outlook has been configured to access your Unified Messaging mailbox, you will not be able to access that mailbox by using a telephone while Outlook is running. In order to access the mailbox's subscriber services using a telephone, the Outlook program must first be closed.
- **For Microsoft Outlook 2007/2010**
The Outlook toolbar display may not update to reflect a call's status, etc. correctly if it is not the active window. If the window displaying the Outlook toolbar is not active, click it to refresh the toolbar's display.

Account Setup

An account must be set up in Outlook for use with the Unified Messaging system (separate from your usual e-mail account). The setup procedure will vary depending on the version of Outlook used and the configuration of your network. When adding the account, the settings must be specified as follows:

-
- The type of the account must be set to IMAP.
 - The mail server must be set as the IP address of the PBX where your UM mailbox is located.

Note

In a One-look network, the UM mailbox may be located on a Slave unit and not the Master unit. Ask your network administrator for details.

- The user name is your UM mailbox extension number.
 - The password is your UM Message Client Mailbox Password.
 - Specify a valid SMTP server (ex. the SMTP server used for your existing mail account).
- If you are unsure of any of these settings, ask your network administrator for details.

Offline Settings

When using IMAP to access voice mail and fax messages, additional PBX system resources are used. To reduce the possibility of affecting PBX operation, Outlook should be configured to operate offline for the UM mailbox. For information about configuring Outlook for working offline, refer to your software's documentation, or consult your network administrator.

If Microsoft Outlook is installed or upgraded after CA Client has been installed

Follow the procedure below if Microsoft Outlook is newly installed on a computer after CA Client has been installed, or you are using Microsoft Outlook with CA, and you upgrade your version of Outlook (for example, you upgrade from Outlook 2007 to Outlook 2010).

1. Run the CA Client setup program.
2. In **Optional Feature Selection**, select the check box for **CRM Toolbar**.
3. Follow the prompts to complete the setup.

CA Client will be reinstalled to operate with the new or upgraded installation of Microsoft Outlook. For details about the CA Client setup program, see **4.2 Installing and Starting CA Client**.

If the toolbar for CA Client is not displayed in Microsoft Outlook

If the toolbar is not displayed when you are using Microsoft Outlook, it may have been disabled by Outlook's settings. You can confirm these settings by following the procedure below according to your version of Outlook.

For Microsoft Outlook 2003:

1. From the menu, click **Help** → **About Microsoft Office Outlook**.
2. Click **Disabled Items**. If the item "CAOutlookAddin" is disabled, enable it.

For Microsoft Outlook 2007:

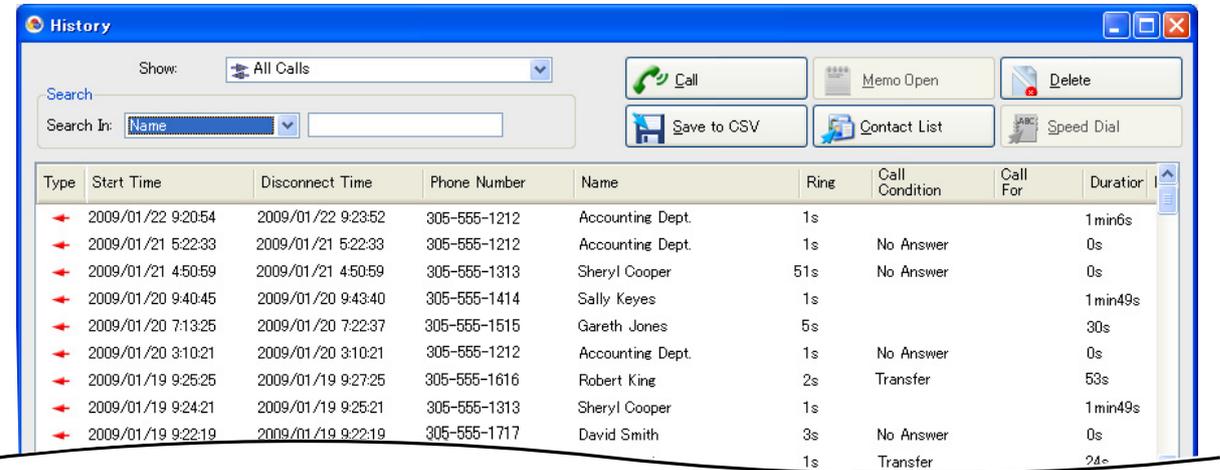
1. From the menu, click **Tools** → **Trust Center...** → **Add-ins**.
2. In the **Manage:** drop-down list, select **Disabled Items**, and then click **Go**. If the item "CAOutlookAddin" is disabled, enable it.

For Microsoft Outlook 2010:

1. In the **File** tab, click **Options**.
2. Click **Add-ins**.
3. In the **Manage:** drop-down list, select **Disabled Items**, and then click **Go**. If the item "CAOutlookAddin" is disabled, enable it.

Call History

You can view your incoming and outgoing call history. Information such as the destination and duration of the call, the time of the call, and whether the call was answered is displayed for each call. You can also save the history list to a CSV file.



Type	Start Time	Disconnect Time	Phone Number	Name	Ring	Call Condition	Call For	Duration
←	2009/01/22 9:20:54	2009/01/22 9:23:52	305-555-1212	Accounting Dept.	1s			1min6s
←	2009/01/21 5:22:33	2009/01/21 5:22:33	305-555-1212	Accounting Dept.	1s	No Answer		0s
←	2009/01/21 4:50:59	2009/01/21 4:50:59	305-555-1313	Sheryl Cooper	51s	No Answer		0s
←	2009/01/20 9:40:45	2009/01/20 9:43:40	305-555-1414	Sally Keyes	1s			1min49s
←	2009/01/20 7:13:25	2009/01/20 7:22:37	305-555-1515	Gareth Jones	5s			30s
←	2009/01/20 3:10:21	2009/01/20 3:10:21	305-555-1212	Accounting Dept.	1s	No Answer		0s
←	2009/01/19 9:25:25	2009/01/19 9:27:25	305-555-1616	Robert King	2s	Transfer		53s
←	2009/01/19 9:24:21	2009/01/19 9:25:21	305-555-1313	Sheryl Cooper	1s			1min49s
←	2009/01/19 9:22:19	2009/01/19 9:22:19	305-555-1717	David Smith	3s	No Answer		0s
					1s	Transfer		24s

CA Server Missed Call Log

If CA Server is installed on your network, when a call to your extension is not answered and you are not logged in to CA Client, CA Server will record the missed call. When you next log in to CA Client, you will be notified of any missed calls.

Note

Calls received as a member extension of an incoming call distribution group are not recorded using this feature.

Absent Message/Forward/Do Not Disturb

You can change the absent message, forward, and do not disturb (DND) settings of your extension. When you change your absent message, your forward/DND settings can be changed automatically, and a feature number, such as "Extension dial lock" can be dialed automatically.

Call Control

When a conversation starts, operation buttons are automatically displayed on your PC for telephone functions such as transferring a call, holding a call, and making a conference. If a called extension is busy, you can set callback ringing, send a call waiting tone, start a text chat, or leave a voice message.

During a call:

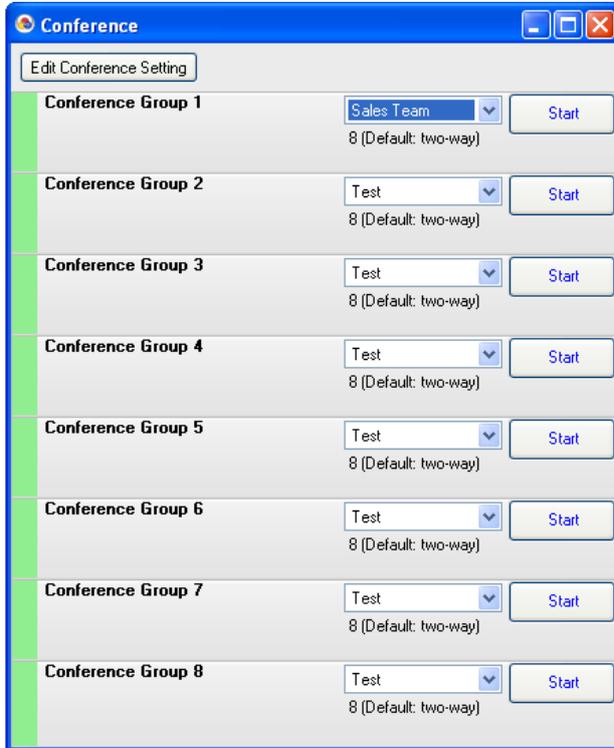


When calling a busy extension:

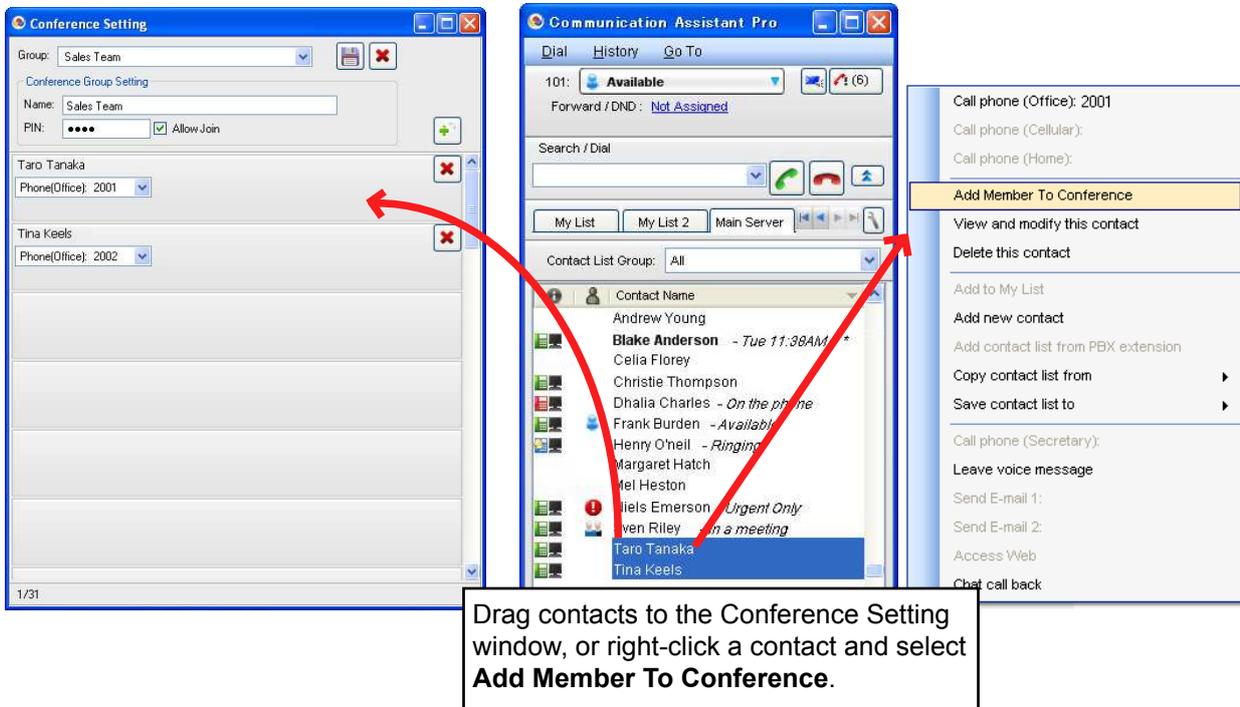


Conference Features

A conference can be easily initiated using the conference interface. Choose **Conference** from the **Dial** menu to open the Conference group list. You can check the status of conferences in progress, request to join a conference, or start a conference if your extension has that ability enabled.



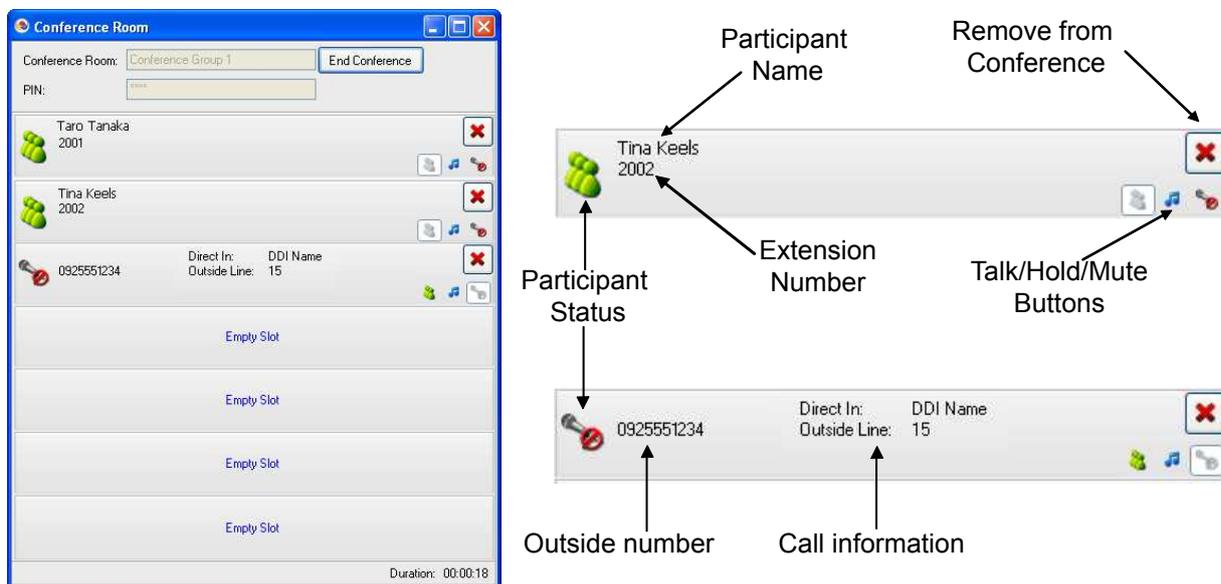
The originator of the conference can click **Edit Conference Setting** and make a conference of up to 32 participants. To add members to a conference, drag and drop contacts from a contact list to the conference setting window, or right-click a contact and select **Add Member To Conference**.



Notice

- If you make changes to conference member settings from CA Client and begin a conference call, the new settings will be used instead of the PBX’s conference call settings, and the PBX’s conference call settings will be cleared.
- You can call a conference group of up to 7 parties to establish a conference call from CA Client, even if your PBX has the features to do a conference call for more parties from the phones.

Once the conference has started, a PBX extension user (or outside caller accessing the PBX using DISA) can join the conference. During a conference, the originator of the conference can enable or disable the ability of other members to speak, put them on hold, or remove them from the conference.



IP Camera Integration (Panasonic KX-HCM/BB-HCM/BL-C series cameras)

If a Panasonic IP Camera is available on the network, you can view images or streaming video from the IP camera while talking with the other party (e.g., extension, doorphone).

Note

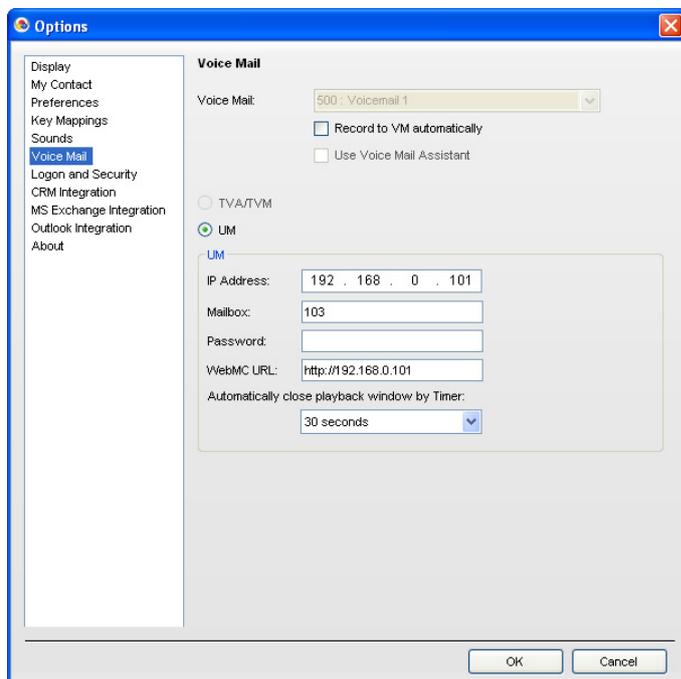
This feature requires Internet Explorer® version 6.0 or higher.

Unified Messaging Integration (KX-NS series PBXs only)

You can record conversations to voice mail automatically or manually. When a message is left on your mailbox, a message waiting indication is displayed. You can call the Unified Messaging system to listen to messages, or you can listen to messages, view faxes, and manage your mailbox using the Microsoft Outlook plug-in. See **Microsoft Outlook Integration** for details.

In order to use your Unified Messaging mailbox with CA Client, settings must be configured as follows:

1. From the **Go To** menu, select **Option**.



2. In **Voice Mail** , select your mailbox from the **Voice Mail:** drop-down list, and check that the **UM** radio button is selected.

Note

If the **Voice Mail:** drop-down list is greyed out, the setting must be selected using CA Web Manager for CA Server. For details, contact your system administrator.

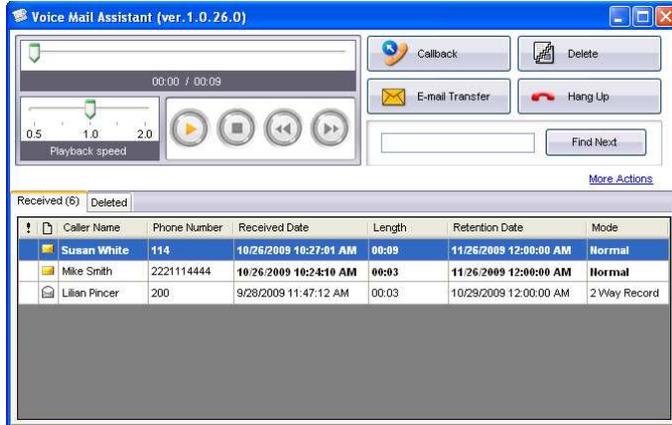
3. Enter the following information:
 - **IP Address:** Specify the IP address of the PBX where your UM mailbox is located. (This may be different from the IP address used to log in to CA Client.)
 - **Mailbox:** Specify your UM mailbox number.
 - **Password:** Specify your UM Message Client Mailbox Password.
 - **WebMC URL:** Specify the URL for accessing the Web Maintenance Console of the Master unit PBX. The format must be as follows:
http://[IP Address of Master unit]:[Web MC Port number of Master Unit]
For example, if the IP Address of the Master unit is 192.168.0.101 and the Web MC port is 80, you would enter the following: "http://192.168.0.101:80".
For details, refer to the documentation for the KX-NS series.
 - **Automatically close playback window by Timer:** Specify the amount of time until the connection to the UM system is ended if there is no activity.
4. Click **OK**.

Voice Processing System (VPS) Integration (KX-NCP/KX-TDE series PBXs only)

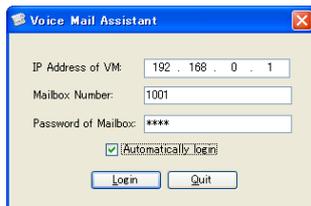
You can record conversations to voice mail automatically or manually. When a message is left on your mailbox, a message waiting indication is displayed.

Voice Mail Assistant

By clicking the message waiting icon and selecting **Call Voice Mail**, you can operate VPS voice mail from the PC with Voice Mail Assistant.



- In order to use Voice Mail Assistant, the VM IP address must be set correctly.



- Voice Mail Assistant uses 2 fixed ports: 20000 and 20001.
- You can customise your mailbox, such as setting the notification schedule.

Note

- This feature requires KX-TVM series VPS firmware version 2.1 (main software version 2.50 or later).

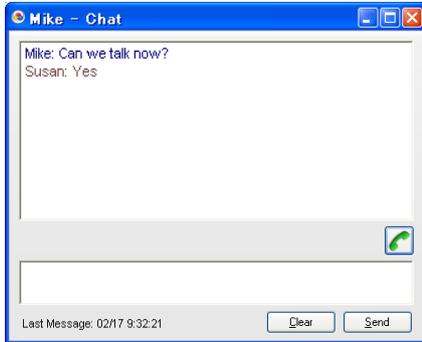
IP Softphone

You can use the built-in IP Softphone. A KX-NCS32xx/KX-NCS42xx/KX-NSM2xx activation key must be installed in your PBX.

You can record all phone conversations to your PC if a KX-NCS81xx licence is installed in your PC.

Chat

You can start a text chat session with other CA Client users. This feature is useful for tasks such as confirming whether a colleague is available for a phone conversation. You can also set Chat call back to a user not currently logged in, and the message will appear on the user's screen when they next log on.



- The chat feature can be restricted according to user's Class of Service (COS) settings. Only extensions permitted to use chat will be able to initiate a chat session.
- A chat session uses 1 available port in the range 42525–42534.

Note

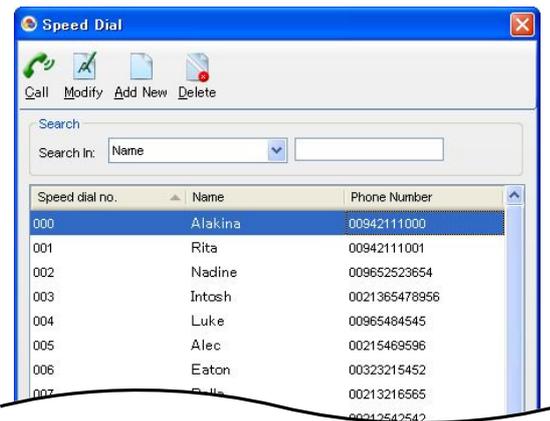
A network activation key is required when using this feature with users connected to other PBXs.

System Speed Dial Control

If you log in at an extension that is assigned as a manager in its COS settings on the PBX, you can add, modify, and delete entries in the Speed Dial list. You can also copy entries from the call history.

Note

When CA Server is used, you cannot add, modify, or delete entries in the Speed Dial list.



Thin Client Support

CA Client can be used in a thin client environment. The supported thin client environments are Citrix XenApp™ and Microsoft Terminal Service only. CA Server and a thin client activation key (KX-NSA010/ KX-NCS2010) are required to enable thin client support.

Note

When using CA Client in a thin client environment, the following features are not available:

- IP Softphone
- 1st Party TSP features
- 3rd Party CRM Integration
- Microsoft Outlook Integration

Function Key Bar

The function key bar can be accessed by choosing **Function Key** from the **Go To** menu. A bar appears with common call control function keys that always stays in front of other windows. If you drag the function key bar to the top, bottom, or sides of the screen it will 'dock' to the edge of the screen without overlapping with any other program windows.



Note

- The docking feature of the Function Key Bar is not available when using a thin client.
- The Account Code function key can only be used to input an account code before an outgoing call is dialed. Account codes input during or after the call (using the function key bar) will not be recorded in the SMDR.

Operator Console Features

If you log in to CA Client in Operator Console mode, you can manage and redirect multiple calls simultaneously. Call parking and extension management features are available for managing a large volume of call traffic. Parked calls are put on hold and pooled into a common parking zone, and can be retrieved by any extension user.

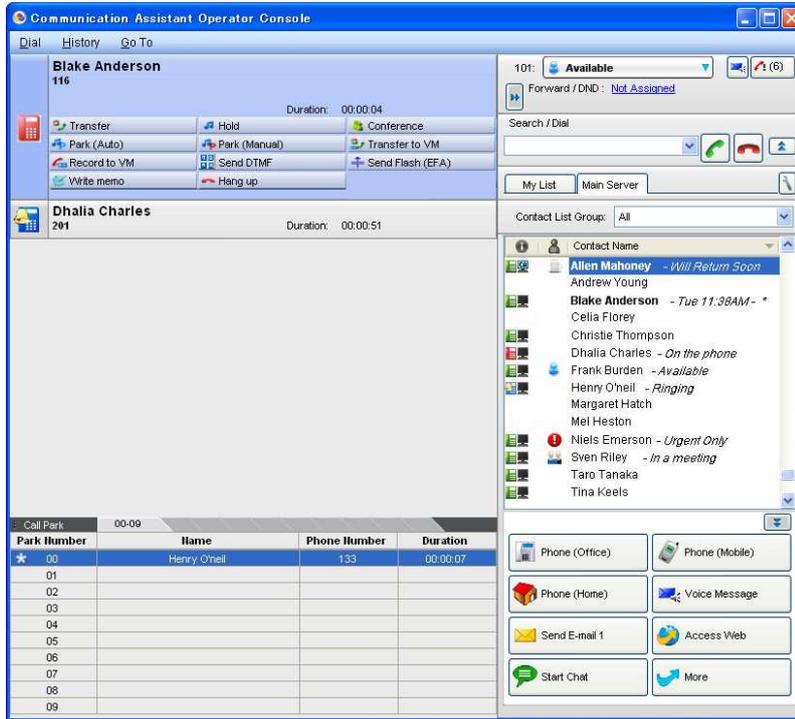
Using Operator Console, you can also:

- Perform unscreened transfers
- Change some settings of other extensions (e.g. FWD/DND, Absent Message, extension lock/unlock, etc.)
- Listen in on conversations
- Take over calls
- Override busy extensions

Using Operator Console with the KX-NS1000

When an Operator Console user is connected to a KX-NS1000 Master unit that is connected to other KX-NS1000 PBXs in a One-look network, all of the extensions of the One-look network are visible in Operator Console.

Operator Console Interface



Note

- To enable extension control features, your extension must be assigned as a manager in its COS settings on the PBX.
- To use the Listen-In function, your extension must have "Call Monitor" enabled in its COS settings on the PBX.
- To use the Busy Override/Take Over functions, your extension must have "Busy Override" enabled in its COS settings on the PBX.

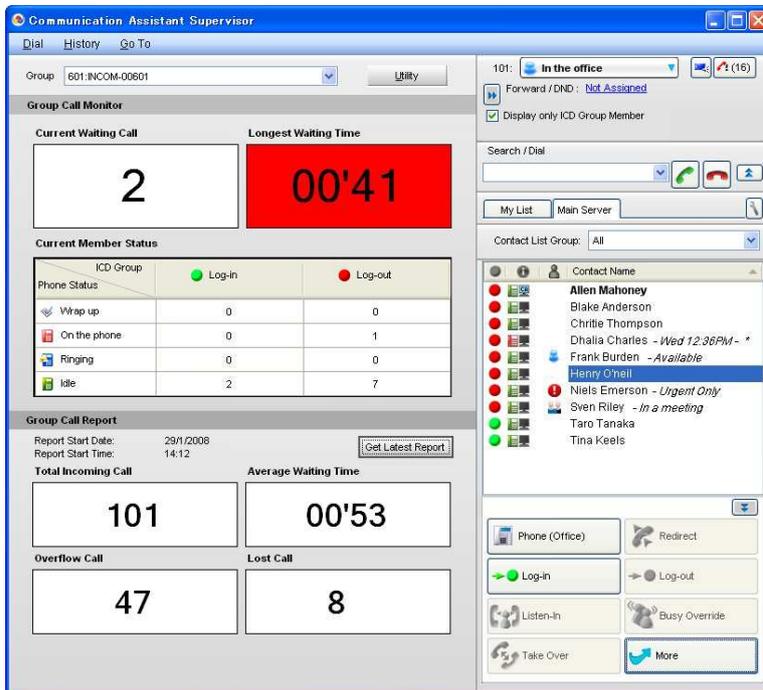
Supervisor Features

If you log in to CA Client in supervisor mode, you can monitor the status of Incoming Call Distribution (ICD) groups, listen in on conversations, take over calls, and perform other supervisory functions.

When using CA Server, the following features are also available:

- Opening the presence of an extension that is having a conversation will display the name and telephone number of the other party, as well as the duration of the call.
- You can use supervisor features for all ICD groups if the appropriate user settings are made using CA Web Manager.

CA Supervisor Interface



CA Supervisor Call Control



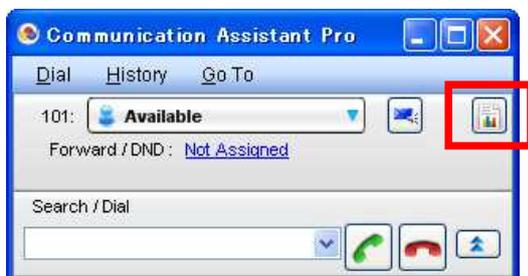
Note

- To use supervisor features when connecting to the PBX directly, your extension must be assigned as the supervisor of an ICD group in the PBX settings.
- To use the Listen-In function, your extension must have "Call Monitor" enabled in its COS settings on the PBX.
- To use the Busy Override/Take Over functions, your extension must have "Busy Override" enabled in its COS settings on the PBX.

ACD Report Generation with Poltys CCView

Poltys CCView is an end-user call management tool that provides real-time call monitoring, automatic call distribution (ACD) reports, and call logging and accounting features. CCView can be used with CA to manage call centre environments.

When CCView is installed on the PC, an ACD Report button will be displayed in CA Client. Click this button to launch CCView.



Note

- To use CCView, the following software must be installed:
 - CCView Client (installed on the PC running CA Client)

- CCServer (installed on a dedicated server)
- CCView Middleware
- The information collected by CA Supervisor cannot be shared with CCView.
- System requirements for CCView and CCServer may differ from CA Client.
- A 3rd Party CTI Link Activation Key (KX-NSF101) is required for KX-NS series users to use CCServer with CA.
- If CCView Server is used with a PBX that is connecting to CA Server, CSTA MUX must be used to allow connections to the PBX for both servers. For more information about CSTA MUX, refer to the CSTA Multiplexer Quick Reference Guide.
- For information about CCView and related software and middleware, contact your dealer.

Feature Comparison

CA Client has 4 operating modes: Basic-Express, Pro, Operator Console, and Supervisor. The following table summarises the features available for each mode.

Feature	Basic-Express	Pro	Operator Console	Supervisor
View other extensions' presence from main menu	No	Yes	Yes	Yes
Maximum number of contacts	10	1000	1000	1000
Maximum history length	10 calls	1000 calls	1000 calls	1000 calls
ICD group login/logout	No	Yes	Yes	Yes
Listen-In/Busy Override/Take Over	No	No	Yes	Yes
ICD group supervisor	No	No	No	Yes
Conference Interface	No	Yes	Yes	Yes
Network Features	No	Yes	Yes	Yes
3rd-party CRM integration	No	Yes	Yes	Yes
Microsoft Exchange Server integration	No	Yes	Yes	Yes
ACD reports with CCView	No	Yes	Yes	Yes
CA Server missed call log	No	Yes	Yes	Yes
Microsoft Outlook toolbar	Yes ^{*1}	Yes	Yes	Yes
Outgoing Calls from Outside the Office	No	Yes	No	No

*1 Call history and presence display in Outlook are not available for Basic-Express users.

Note

- A CA activation key for the desired number of users must be registered in the PBX. See **3 System Requirements** for details about the activation keys.
- You must enable CA mode for the extensions that will use CA Client in the PBX settings.

Free and Trial CA Installations

A limited number of copies of CA Basic-Express can be used on your PBX's network without activation keys. Also, a limited number of free 60-day trials are available for other CA modes. During the trial period, all of the modes' features are usable without installing an activation key.

The following tables detail the number of CA Basic-Express and trials available according to your PBX:

Free Activation Keys

Activation Key Type	KX-NS series	KX-NCP500/ KX-NCP1000	KX-TDE100/ KX-TDE200	KX-TDE600
Basic-Express	240 (PBX Mode) 1022 (Server Mode)	5	10	20

60-day Free Trial Activation Keys

Activation Key Type	KX-NS series	KX-NCP500/ KX-NCP1000 ^{*1}	KX-TDE100/ KX-TDE200	KX-TDE600
Pro	128	2	4	8
Operator Console	1	2	4	8
Supervisor	1	–	–	–
Thin Client Server Connection	1	–	–	–

^{*1} 60-day trials for KX-NCP series PBXs include IP softphone functionality for the duration of the trial, but only if CA Server is not installed on the PBXs network.

Note

For KX-NCP/KX-TDE series PBXs, the 60-day trial period begins once you have installed CA Client on a PC. For KX-NS series PBXs, the 60-trial period begins when the PBX is installed.

Login Capabilities

The total allowed number of simultaneous CA Client users is determined by the type of CA Client used and whether or not CA Server is installed on your network.

The following table shows the maximum number of users that can simultaneously log in for each mode.

CA Client Login Mode	No. of Users PBX Only (Up to 240 total users)	No. of Users with CA Server (Up to 1022 total users)
Basic-Express	240	1022
Pro		
Operator Console	128	128
Supervisor	4	

Note

A One-look PBX network has the same maximum number of simultaneous CA Client users as a "PBX only" configuration. CA Server is required to increase the maximum number of users within the One-look network.

Dial Modification

When you make an external call from the contact list or a CRM application, or copy an external phone number to CA Client from another application, the number is modified according to the dial modification settings.

Note

- These dial modification settings can only be made through CA Client when accessing the PBX directly. If CA Server is used, settings must be made through the CA Server Web Manager.

Example

Copy a telephone number from another application.

```
Thank you very much for your time.

*****
Michael Victor

Tokuoka Kikaku

Phone: +81-92-123-4567
Fax: +81-92-123-5678
*****
```

Paste the number into CA Client's dial box by pressing CTRL+V.



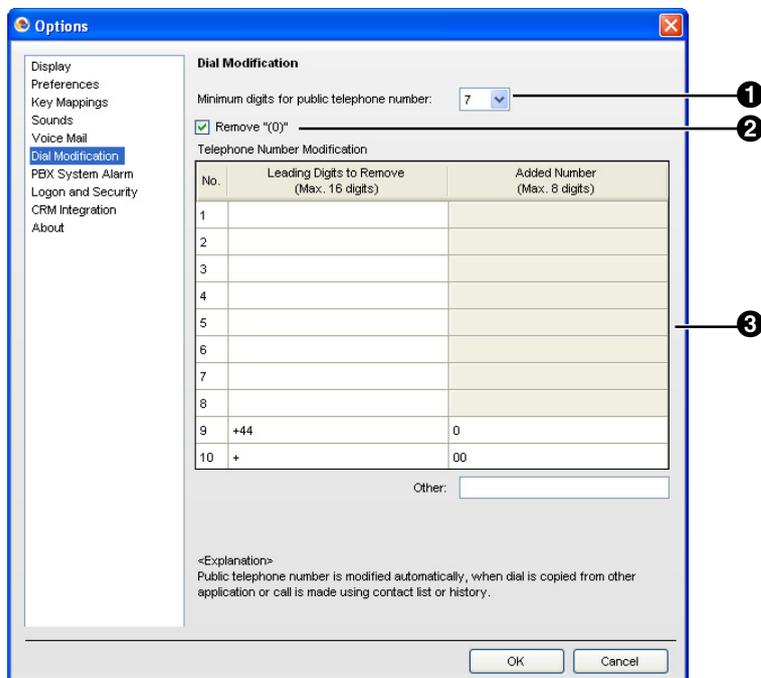
When pasted, the telephone number is modified automatically, as programmed by the user.

Note

This operation can only be performed when the Dial and Search boxes are not combined. From the **Go To** menu, select **Option**, and then select **Display**. On this screen, select **Disable** for **Combine Search and Dial**, and click **OK**.

Dial Modification Settings

- From the **Go To** menu, select **Option**, and then select **Dial Modification**. The following window is displayed:



1 Minimum digits for public telephone number

Specifies the minimum number of digits required to treat the dialled number as an external telephone number. If the number of digits dialled is less than the specified value, it will not be treated as an external call. The default value is 7. For example, a number is treated as below by default.

1234567 = 7 digits → External telephone number

123456 = 6 digits → Not an external telephone number

2 Remove "(0)" check box

Deletes the string "(0)" from a copied external telephone number.

[Example]

+81-(0)1-2345-6789P12 → +81-1-2345-6789P12

3 Telephone Number Modification

A dialled number is modified according to the Telephone Number Modification table.

[Example]

Dial Modification Settings

No.	Leading Digits to Remove (Max. 16 digits)	Added Number (Max. 8 digits)
1	+8192	
2	+81	0
3	+	001
4	092	

Modifications

Dialled Number	Corresponding Table No.	Removed Digits	Added Digits	Modified Number
+81-92-123-4567	1	+8192	—	123-4567
+81-3-111-4444	2	+81	0	03-111-4444
+44-66-111-4444	3	+	001	001-44-66-111-4444
092-111-8888	4	092	—	111-8888

2. Configure **Minimum digits for public telephone number**, **Remove "(0)"**, and the **Telephone Number Modification** table as desired.
3. Click **OK**.

Conditions

General

- The following table shows which kinds of telephones can be used with CA Client:

Telephone Type	Use with CA Client
Digital Proprietary Telephone (DPT)	✓
Analogue Proprietary Telephone (APT)	✓
IP Proprietary Telephone (IP-PT)	✓
IP Softphone	✓
Portable Station (PS)	✓
Single Line Telephone (SLT)	✓
SIP Extension	✓ ^{*1}

^{*1} Only Panasonic KX-UT series SIP phones connected to a KX-NS series PBX can be used with CA. Other SIP phones and PBX systems are not supported.

- The following table shows which features are not available when using CA with the specified phone types.
 ✓: Available
 X: Not available

Feature	IP-PT/DPT	SLT	PS	KX-UT Series SIP Phone
Answer Call using the CA Interface	✓	X	X	✓
Call Splitting	✓	✓	✓	X
DND Override	✓	✓	X	X
VM Transfer	✓	✓	✓	X
Record to VM	✓	✓	✓	X
Automatic Callback Busy	✓	✓	✓	X
Call Waiting	✓	✓	✓	X
Leave Message Waiting	✓	✓	✓	X

Feature	IP-PT/DPT	SLT	PS	KX-UT Series SIP Phone
Listen-In ¹	✓	✓	X	X
Busy Override ¹	✓	✓	X	X
Take Over ¹	✓	✓	X	X
TRS Change using the CA interface	✓	X	X	X
Timed Reminder (Wake-up Call)	✓	✓	✓	X

¹ This feature can be used in CA Supervisor and CA Operator Console modes only.

- When callback ringing is used with the following features, the call must be manually answered using the PS:
 - Make Call
 - Message Waiting Callback
 - Account Code Entry
 - Call Pickup
 - Leave Message Waiting
 - Door Open
- The following are not supported in CA Client:
 - Call handling with a PS in Wireless XDP Parallel mode
 - Calls using the PDN/SDN button
- When logging in to CA Client, if you enter the wrong password for a given extension number a pre-programmed number of times, the CA Client password will be locked.
To clear the password lock:
 - For PBXs without CA Server, the extension PIN lock needs to be cleared. Clear the extension's PIN lock using PT Manager programming. When the PIN lock is cleared, the CA Client password and CA password lock are also cleared.
 - For PBXs with CA Server, the password lock must be cleared by using CA Web Manager. For details, see the CA Server Quick Reference Guide.
- The VM menu feature for a display PT should be disabled in the COS settings on the Voice Processing System (VPS). If it is not disabled, you cannot record a VM greeting message in CA Client.
- If the PBX settings are changed, you must restart CA Client in order for the changes to be reflected in CA Client.
- If CA Server is installed, and settings are changed using CA Web Manager, you must restart CA Client in order for the changes to be reflected in CA Client.
- Calls that you make from your extension when you are not logged in to CA Client are not recorded in the call history. CA Server is required to record calls missed when not logged in to CA Client.
- CA Client does not support calling restrictions between PBX tenants. The presence for other tenant's extensions are displayed in CA Client.

Microsoft Exchange Server Integration

- Because CA Server acquires data from the Exchange Server every 5 minutes, there may be a delay of up to 5 minutes between the start or end of an event in an Exchange calendar and the corresponding presence change in CA Client.

SIP Phones

- The following SIP phones can be used with CA Client. The SIP phones must be connected to a KX-NS series PBX.
 - KX-UT series SIP phones
- The PBX's Account Code Entry feature can only be used through the function key bar of CA Client.

-
- When using a KX-UT series SIP phone with CA Client, even if **Transfer automatically when new call is made during talking** is disabled in the **Preferences** screen of the **Option** window, operation will be the same as if it were enabled (making a new call while in a conversation with another party will always transfer the call to the new party).

Absent Message

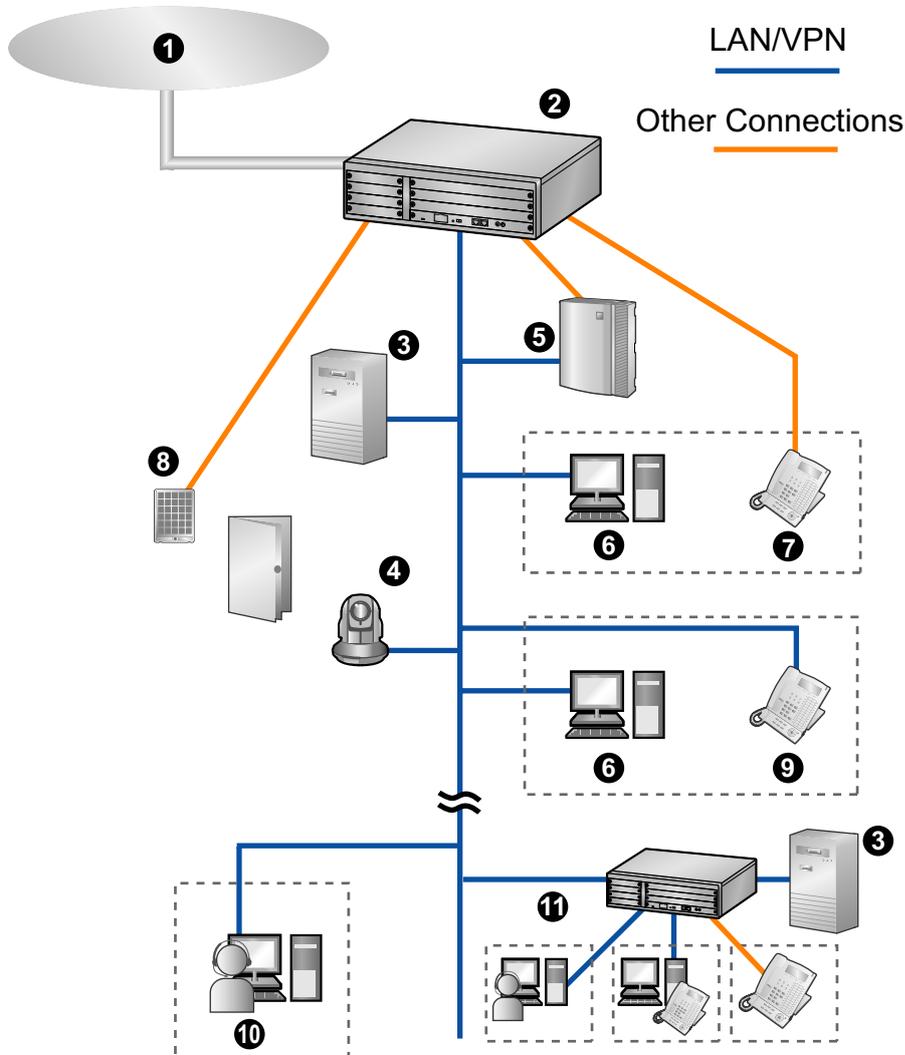
- If you are connecting to a CA Server, and that CA Server is not within your Local Area Network (LAN), do not enable the Auto Absent Message feature.

Conference Features

- During a conference, a maximum of 8 participants (including the originator) can have the ability to speak at one time. To allow other members to speak, one of the participants that already has the ability to speak must first be muted using the conference interface.

2 System Connection Diagram

The figure below illustrates an example network setup using CA Client.



- ❶ Telephone Company
- ❷ Panasonic PBX
- ❸ CA Server
- ❹ Panasonic Network Camera
- ❺ Voice Processing System (KX-NCP/KX-TDE series PBXs only)
- ❻ PC running CA Client
- ❼ Proprietary Telephone or Single Line Telephone
- ❽ Doorphone and Door Opener
- ❾ IP Proprietary Telephone or SIP Phone
- ❿ Remote PC running CA Client with Softphone
- ⓫ Networked PBX and Networked CA Client Users and Extensions

3 System Requirements

The tables below summarise the requirements for running CA Client.

PC

When CA Client is connected to your PBX directly, the number of contacts that can be displayed in the contact list depends on your computer's specifications. When CA Server is used, the number of contacts, including contacts of other networked PBXs, is not limited by your PC's specifications.

CPU	Memory	Number of Contacts in Contact List	
		Direct PBX Connection	CA Server Connection
1.0 GHz Intel® Pentium®/Celeron® processor or comparable CPU	512 MB	32	1000
2.0 GHz Intel Pentium/Celeron processor or comparable CPU	1 GB	128	1000
2.6 GHz Intel Pentium/Celeron processor or comparable CPU	1 GB	256	1000
2.6 GHz Intel Core™2 Duo processor or comparable CPU	1 GB	1000	1000

Note

- The above specifications are approximations and may vary according to your computer's status, network conditions, other programs running, etc.

Supported Operating Systems:

- Microsoft Windows® XP Professional Service Pack 3 or later (32-bit¹)
- Windows Vista® Business (32-bit/64-bit)
- Windows 7 Professional (32-bit/64-bit)
- Windows 8²

¹ 64-bit versions of Windows XP are not supported.

² The Windows 8 tile-based Metro UI is not supported.

Other specifications are as follows:

	Minimum	Recommended
Hard Disk	1.5 GB available space	2.0 GB available space
Video Resolution	1024 × 768	1280 × 1024
Interface	10/100Base-T	100Base-T

For thin client environments, the following two platforms are supported:

- Microsoft Terminal Service on Windows Server® 2003 with Service Pack 1 or later and Windows Server 2008
- Citrix XenApp on Windows Server 2003 with Service Pack 1 or later (Client computer must fulfill the system requirements for Citrix XenApp)

PBX

To use CA Client, confirm your PBX matches the requirements listed below.

PBX Model	Required Software File Version
KX-NCP500/KX-NCP1000	PBMMPR Software File Version 5.0000 or later
KX-TDE100/KX-TDE200	PMMPR Software File Version 5.0000 or later
KX-TDE600	PGMPR Software File Version 5.0000 or later
KX-NS1000	PCMPR Software File Version 003.00000 or later
KX-NS500	PFMPR Software File Version 001.0000 or later

- For KX-TDE600 users, it is strongly recommended to use CA Server with CA Client. For more information about CA Server, contact your dealer.

Activation Keys

Activation Keys are files that need to be registered to your PBX to use CA Client. Different operating modes of CA Client require different activation keys. For information on how to install activation keys on to your PBX, refer to your PBX's Installation Manual.

The following activation keys are available for use with CA Client:

Model No.		Activation Key Type	Description
KX-NS	KX-NCP/ KX-TDE		
KX-NSA201	KX-NCS2201	CA Pro 1user	CA Client Pro for 1 user.
KX-NSA205	KX-NCS2205	CA Pro 5users	CA Client Pro for 5 users.
KX-NSA210	KX-NCS2210	CA Pro 10users	CA Client Pro for 10 users.
KX-NSA240	KX-NCS2240	CA Pro 40users	CA Client Pro for 40 users.
KX-NSA249	KX-NCS2249	CA Pro 128users	CA Client Pro for 128 users.
KX-NSA301	KX-NCS2301	CA Supervisor 1user	CA Client Supervisor for 1 user.
KX-NSA401	KX-NCS2401	CA Console 1user	CA Client Operator Console for 1 user.
KX-NSU201	–	UM/E-mail 1 User	UM E-mail Notification for 1 user.
KX-NSU205	–	UM/E-mail 5 Users	UM E-mail Notification for 5 users.
KX-NSU210	–	UM/E-mail 10 Users	UM E-mail Notification for 10 users.
KX-NSU220	–	UM/E-mail 20 Users	UM E-mail Notification for 20 users.
KX-NSU299	–	UM/E-mail All Users	UM E-mail Notification for all users.

Notice

The activation key file can only be installed in the PBX with the MPR ID number entered when the activation key file was downloaded. The activation key file cannot be reissued unless the MPR card crashes.

4 Software Installation

4.1 Before Installation

Before beginning the installation of CA Client, please perform the following:

1. Download and install the Microsoft .NET Framework from the Microsoft Web site.
 - Version 3.5 (Service Pack 1 or later) of the Microsoft .NET Framework is required.
 - The Microsoft .NET Framework is available at the following address:
<http://msdn.microsoft.com/netframework/>
2. If you will be using Microsoft Outlook with CA Client, run Microsoft Update in Windows to ensure your installations of Outlook and Microsoft Office are up-to-date. Repeat the update procedure until all updates have been applied. For details, refer to the documentation of Microsoft Outlook and Microsoft Office. If Microsoft Update cannot be used, consult your system administrator.

For users of Microsoft Outlook 2007:

To use CA Client with Outlook 2007, your MSO version must be 12.0.6520.5000 or later. You can confirm the currently installed version number by selecting **About Microsoft Office Outlook** from the **Help** menu of Outlook.

For users of Microsoft Office 2013:

Contact your dealer about using Microsoft Office 2013 with CA Client.

4.2 Installing and Starting CA Client

Notice

If an older version of CA Client is installed over a newer version, the software may not function properly. If you want to downgrade your version of CA Client, uninstall the current version, then install the older version.

Note

When you start CA Client, make sure you are logged in to an account that has administrator privileges.

1. Double-click the setup program according to your operating system configuration:
 - 32-bit version: **Setup(World).msi**
 - 64-bit version: **Setup64(World).msi**Follow the on-screen guidance to install CA Client.

System Environment

In this step, select whether you will be using CA Client in a thin client environment:

- **Non-thin Client Environment:** Use CA Client as a regular program installation.
- **Thin Client Environment:** Use CA Client in a thin client environment. Select this only when installing CA Client onto a thin client server.

Optional Feature Selection

In this step, you can select to add the following during installation:

- **CRM Toolbar:** Add a CA Client toolbar to Microsoft Outlook.
- **IP Softphone:** Install the IP Softphone program for use with CA Client. This option will not be available if **Thin Client Environment** is chosen in the previous step.

2. When you start CA Client for the first time, the screen below is displayed.



Select the display language, and enter your international call access number and international area code. **You must enter your international area code in order to proceed.**

Select your operating mode:

- Standard user (CA Pro): Log in using Pro mode.
- Standard user (CA Basic-Express): Log in using Basic-Express mode.
- Operator Console (CA Operator): Log in using Operator Console mode.
- ICD Group Supervisor (CA Supervisor): Log in using Supervisor mode.

Note

See Feature Comparison (Page 26) for a summary of the different modes.

Check the following features to use them in CA Client:

- **Use softphone:** The IP Softphone will load automatically each time CA Client is started. An IP Softphone activation key for your extension is required to use this feature.
- **Use Network:** Enable the additional connectivity and features offered by CA Server. CA Server and a network activation key are required to use this feature.

3. Click **Save**.

4. Enter an IP address and port number according to the kind of connection to be used:

- **Stand-alone PBX**
Enter the IP address and port number of the PBX.
- **One-look KX-NS1000 PBX Network (without CA Server)**
Enter the IP address and port number of the Master unit PBX of the One-look network.
- **CA Server connection**
Enter the CA Server IP address and port number.

4.2 Installing and Starting CA Client

5. Enter your extension number and password. If this is the first time you are logging in for the extension, leave the password blank. Click **Login**.



The screenshot shows the 'Communication Assistant' window with a 'User Login' sub-dialog. It contains the following fields and controls:

- IP Address of CA Server:** A text box containing '10 . 82 . 227 . 56'.
- Port:** A text box containing '33334'.
- Extension Number:** A dropdown menu with '128' selected.
- Password:** An empty text box.
- Automatically login:** An unchecked checkbox.
- Login** and **Quit** buttons at the bottom.

6. If you are allowed to log in with a blank password, a dialogue box is displayed prompting you to create a password. Enter a password in **New Password**, re-enter it in **Verify Password**, and click **OK**.



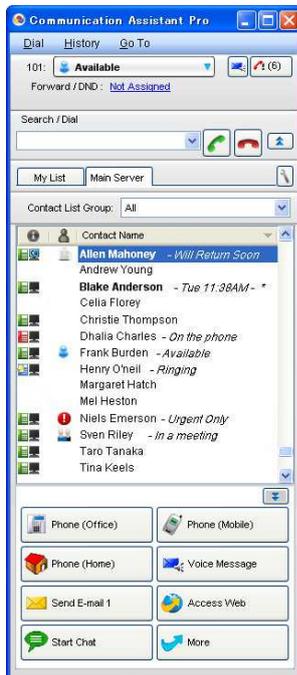
The screenshot shows the 'Communication Assistant - Password' dialog box with the following content:

- Message: 'Password must be assigned' and 'A-Z, a-z, 0-9, * and # can be used for password.'
- New Password (Max.16 characters):** An empty text box.
- Verify Password:** An empty text box.
- OK** and **Cancel** buttons at the bottom.

IMPORTANT

In order to prevent unauthorised access to your CA Client account, enter a password that is at least 5 characters long, and contains a combination of letters and numbers.

After you have entered a new password, the CA Client main screen is displayed.



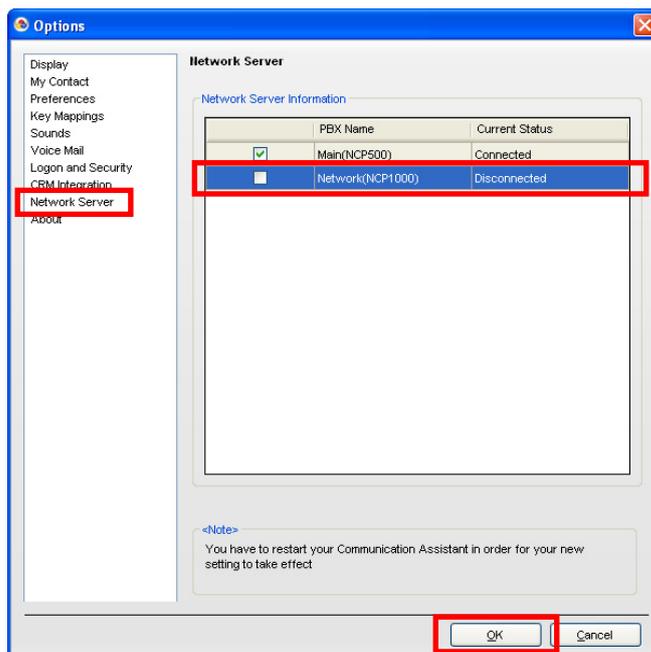
Notice

If CA Server has been installed on your network, before changing CA Client from a PBX connection to a CA Server connection, it is recommended to uninstall CA Client, then reinstall it. If this procedure is not done, all of your contacts will be moved to the 'Business' contact list group.

Network Settings

To enable the display of other networked PBX's contact lists, perform the following procedure:

1. On the CA Client main screen, from the **Go To** menu, select **Option**. On the **Network Server** screen, select which networked PBX's contact lists to display in CA Client. Then click **OK**.



4.3 Uninstalling CA Client

2. Close and restart CA Client.
3. Tabs with contacts for each selected PBX can now be viewed and used.

Note

- Up to 8 PBXs (including your own) can be selected.
- During the initial setup of CA Client, **Use Network** must be checked, and CA Server and a network activation key are required to use this feature.
- The above settings are not necessary to view the contacts within your own One-look network. The contacts of a One-look network of KX-NS1000 PBXs are all displayed in the contact list when CA Client users log in to the Master unit of the One-look network.

4.3 Uninstalling CA Client

To uninstall CA Client, perform one of the following procedures:

- From the **Start** menu, point to **All Programs** → **Panasonic** → **Communication Assistant**, and select **Uninstall**.
- From the Control Panel, double-click **Add or Remove Programs**, select **Communication Assistant**, and then click **Remove**.

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