



WEB PORTAL PERSONAL DIRECTORY

TUTORIAL FOUR

The purpose of this module is to familiarize you with navigating the Personal Directory, using the function icons and adding personal contacts.

WEB PORTAL DIRECTORY

<Click> on the Personal Sub Tab of the Directory Tab















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Directory Voice Mail Conferencing Call Management Options

Kelly Pack - (614) 602 4420

Personal Corporate My Numbers

Search by Last Name Go

| Last Name | First Name | Company | Phone Numbers | Functions | Select |
|-----------|------------|------------------------|----------------|---|--------------------------|
| Lowe | Henry | Henry Miller Furniture | (312) 323 5666 |     | <input type="checkbox"/> |
| Pack | Katherine | Elite Weddings | (312) 323 3578 |     | <input type="checkbox"/> |
| Steve | Stocker | Just For Dolls Inc. | (740) 269 3574 |     | <input type="checkbox"/> |

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Figure 1 – Personal Directory Tab – Adding Favorites

There are a variety of ways to add contacts to your Personal Directory.

- Add individual entries
- Import a CSV file
- Add from the Call Log
- Add from Call Screening

From the Personal Directory Tab
<Click> on the ADD button

The screenshot shows the Planet One Networks web interface. At the top left is the Planet One Networks logo. At the top right are links for 'Logout' and 'Help'. Below the logo is a navigation bar with tabs for 'Directory', 'Voice Mail', 'Conferencing', 'Call Management', and 'Options'. The 'Directory' tab is selected, and the user's name and number, 'Kelly Pack - (614) 602 4420', are displayed. The main content area is titled 'Add' and contains a form for adding a new personal directory record. The form has a left sidebar with the title 'Add new Personal Directory Record' and instructions: 'Enter the required information, and then click the Save button to create a new Personal Directory Record.' The right side of the form contains input fields for: Last Name, First Name, Company, Email Address, Office Number, Cell Number, Home Number, Pager Number, and Fax Number. At the bottom of the form are 'Save' and 'Cancel' buttons. The text 'powered by M6' is visible in the bottom right corner of the interface.


Figure 2 – Adding information to your Personal Directory

<Enter> the information on the right hand side. You can complete as much information as you need here for your personal contacts.


<Click> on SAVE

After saving the information you will automatically go back to the Personal Directory window and will see the contact information you just entered. A system message will display in the upper left corner of the window.

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• Personal Directory successfully modified

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Search by Last Name

























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| | | |  (740) 269 8474 | | |
| | | |  (740) 268 1409 | | |
| | | |  (740) 269 3574 | | |
| | | |  (330) 221 3474 | | |

Figure 3 – Icons in your personal directory

- Cell Number is represented by the  (cell phone icon)
- Fax Number is represented with a  (fax machine icon)
- Home Number is represented by the  (house icon)
- Office Number is represented by the  (briefcase icon)
- Pager Number is represented by the  (pager icon)

IMPORTING A FILE INTO THE DIRECTORY

Before you can import a file into your personal directory, you must export a file. For example, you would first export a file from Outlook, then import into the directory.

IMPORTING DIRECTORY ENTRIES FROM A CSV FILE

You can import an existing contact list that you exported from Outlook or Excel as a comma separated value (CSV) file.

CREATING A CSV FILE

Outlook has an "Import and Export" feature under the File menu that allows you to export the Contacts list. A CSV file that has been exported by Outlook can be opened and edited in Excel. Also, a file can be created in Excel and then exported.

NOTE: If your CSV file was created in Excel and contains a long international number starting with a zero, the default cell size in Excel will display this number in exponential format. When this information is exported from Excel into a CSV file, the leading zero is no longer on the number. When the data is imported into Web Portal, the number will not be correct because the leading zero was not in the file that was imported.

For example: phone number 011-845-882-2999, when entered in Excel with the standard cell width, will be displayed as 1.18459E+11. Therefore, 11845911 will be the number that gets exported to a CSV file by Excel.

To correct this problem, be sure to widen the columns in Excel so that the number is displayed correctly before you export it to a CSV file. This problem does not occur when exporting data from Outlook.

CHECKING THE FILE FORMAT

Column titles are important in the CSV file that is being imported. The columns must be labeled as listed below including case. Failing to capitalize a label as shown will cause the import to fail. Order of the fields is not important and missing or additional fields are simply ignored. Web Portal will use the information from columns with matching labels to create the Personal Directory.

- First Name
- Last Name
- Company
- Business Fax
- Business Phone
- Home Phone
- Mobile Phone
- Pager
- E-mail Address

IMPORTING THE FILE

To import a CSV file into Web Portal, do the following:

On the Directory tab, select the Personal tab.

Click the Import button at the bottom of the screen.

On the Import page, select:

Append - if you want to import all new directory entries (none of the contacts in the CSV file already exist in your Personal Directory)

Overwrite - If you want to update your existing Personal Directory entries with any changes and if you added new contacts to the CSV file.

NOTE: If you have contacts in the CSV file that have already been imported to the directory, and Append is selected, the import function will fail due to duplicate entries.

Type in the entire path name of the file you wish to import. If you do not know the path name, click Browse to search for the file.



Click Upload File to import the file.

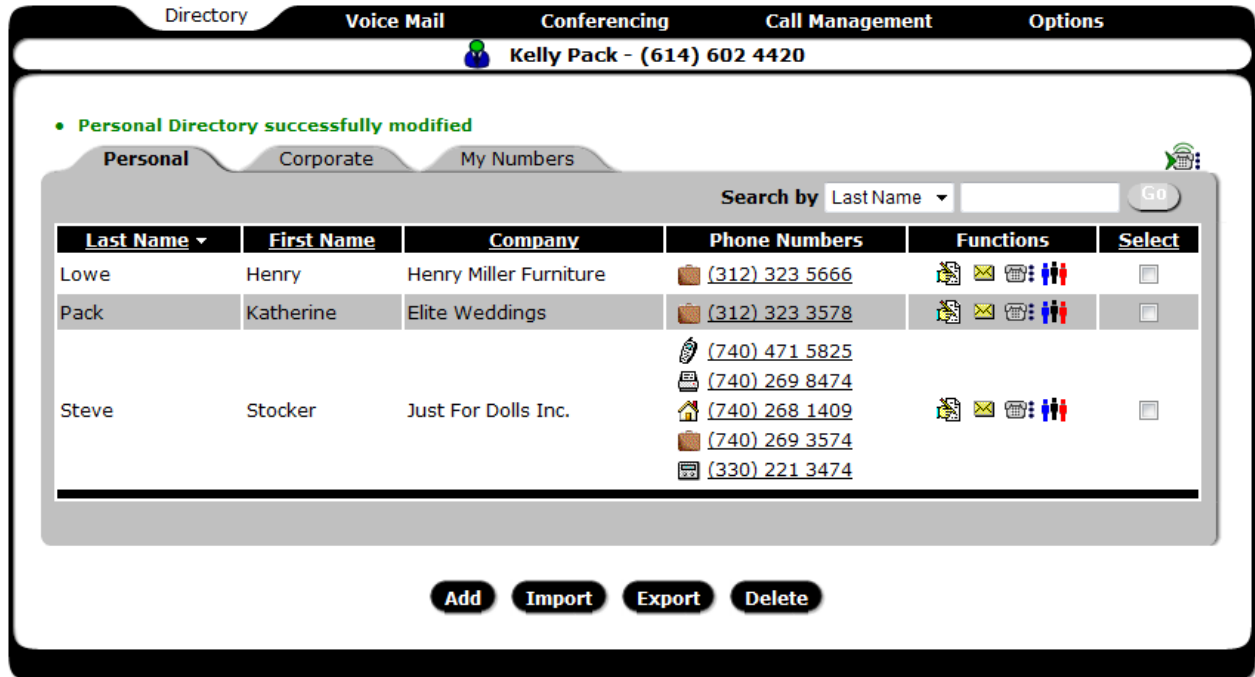
A window will be displayed listing the contents of the file. Click the Import button to import the file. If you do not want to import the file shown or you wish to select a different file, click the browser's Back button.

If you clicked Import, you should get a message saying "Directory successfully imported".

NAVIGATING USING THE FOUR FUNCTION ICONS



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Add Import Export Delete








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Figure 4 – Function Icons from the Directory Window - Edit

Using the Function Icons from the Directory Window there are four icons,



    Edit, Email, Options and Conference In.

<Click> on the  EDIT icon and make any necessary changes or add new information for your contact you will see the system message appear in the upper left corner of the window letting you know that you successfully modified the contact information. (See Figure 4 above)

<Click> on the  Email icon and your email program will open with the TO: populated with the user email that you selected.

<Click> on the  Options icon



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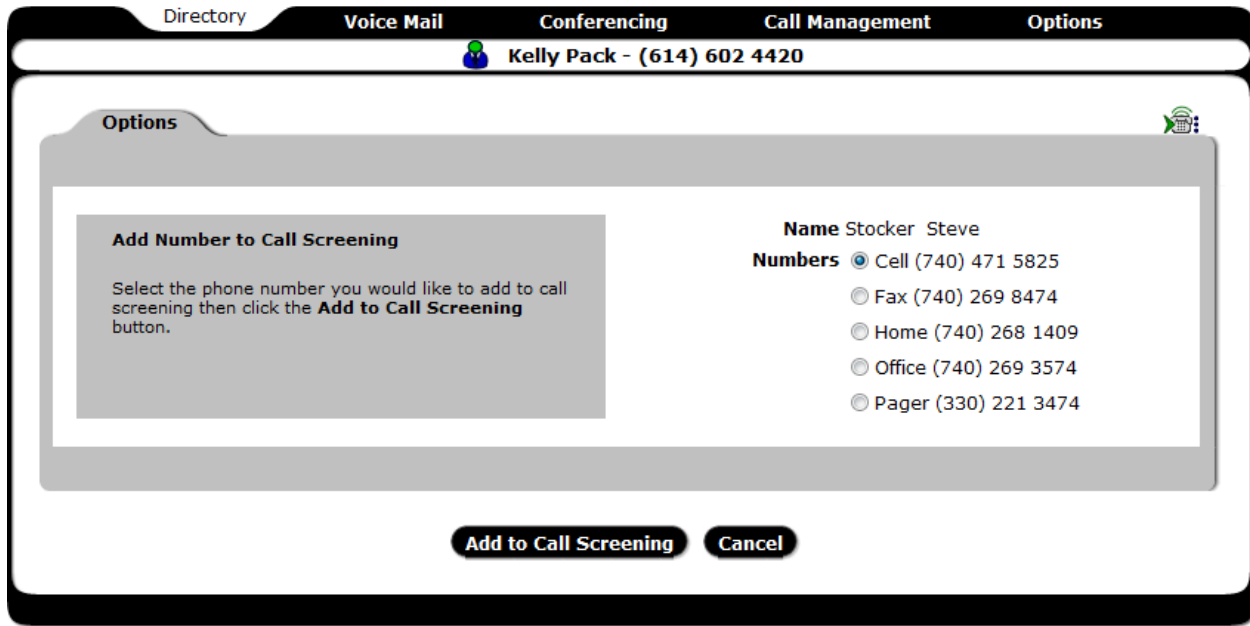



Figure 6 - Function Icons from the Directory Window – Options – Call Screening

Screening Calls from the Personal Directory

You can set up Call Screening actions (such as send to voice mail or forward to another number) for the callers listed in your directory.

1. Find the caller you want to set up a call screen action for.
2. Click the Options button  next to the directory entry that you want to screen.
3. Click the phone number for the entry that you wish to screen (if there is more than one number).
4. Click Add to Call Screening to add a call screen action, or Cancel to exit back to the previous screen.

For more information about Call Screening use the Call Management Module.

<Click> on the  Conference In icon

Conference In - The Conference In icon will allow you to Conference In up to the 5 callers by default and is called Ad hoc conferencing. If more ad hoc users are required, please contact your Planet One Network Support at 614.602.4222

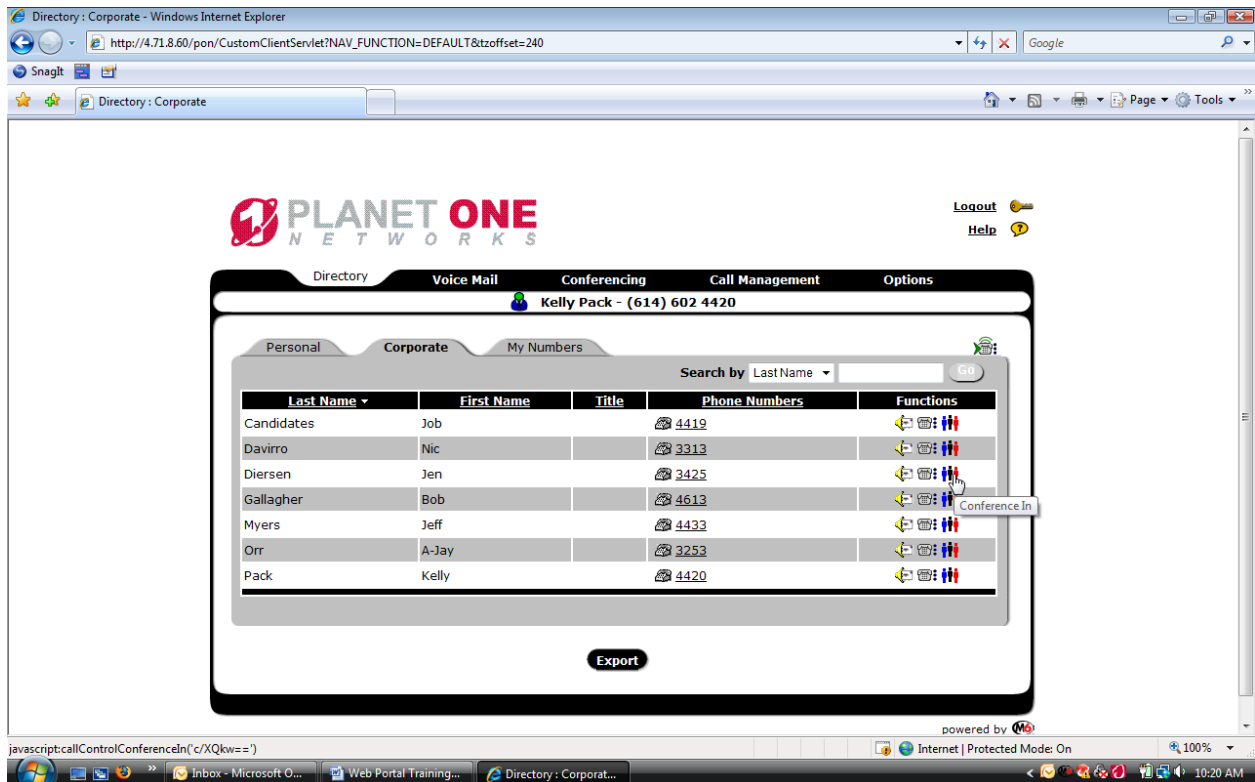


Figure 7 - Function Icons from the Directory Window – Conference In While on an active call using the Voice Assistant:

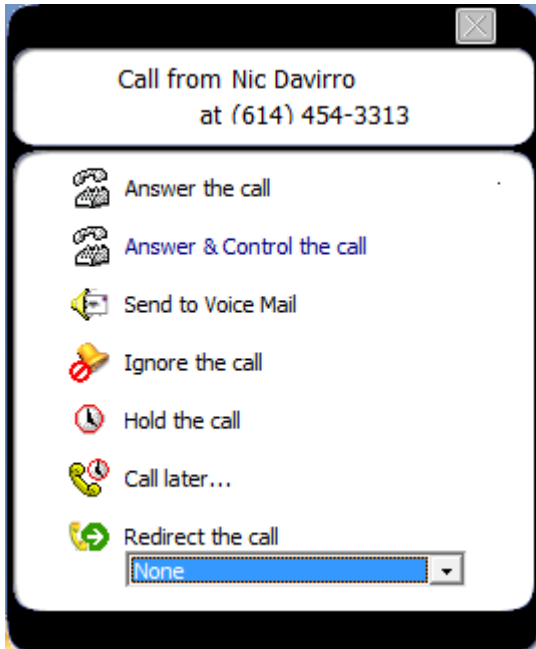


Figure 8 – Answer & Control the Call

<Click> Answer and Control the Call

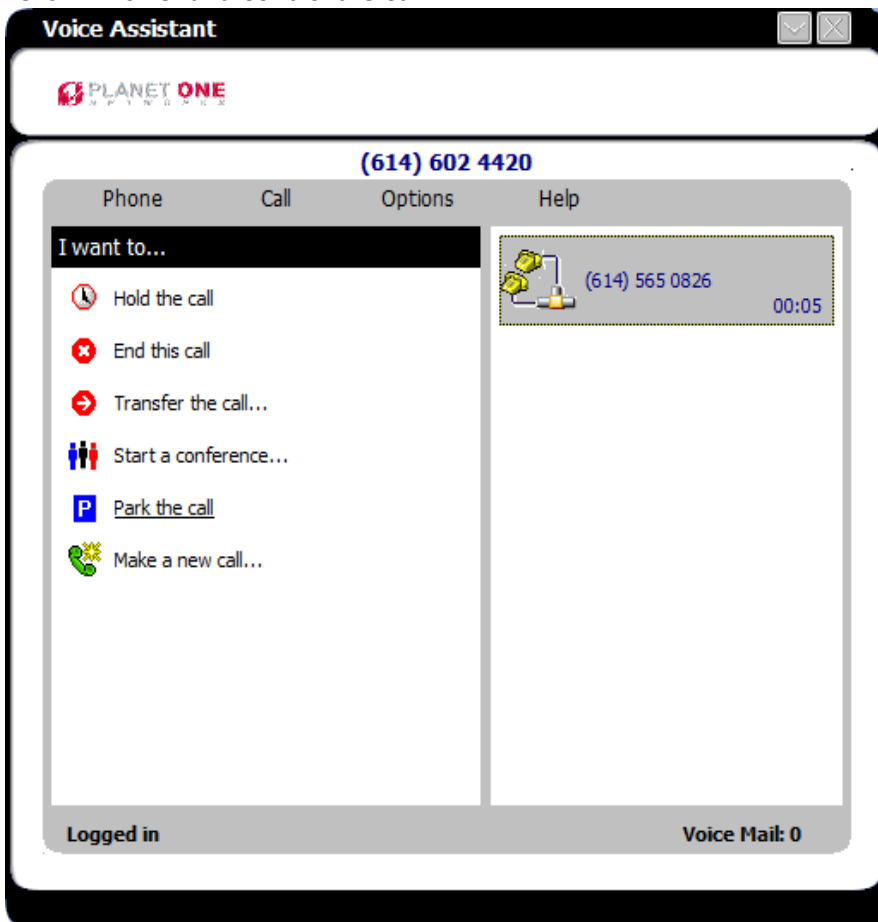


Figure 9 - Voice Assistant Window

Note: you can use the function icon here for Start a Conference IF you know the phone number or extension of party or parties you are going to conference in.
Otherwise you can: Bring up your Personal Directory and find the first party that needs to be connected.

<Select> the party

<Click> Conference In

Click on the phone number of the party you want to conference in.

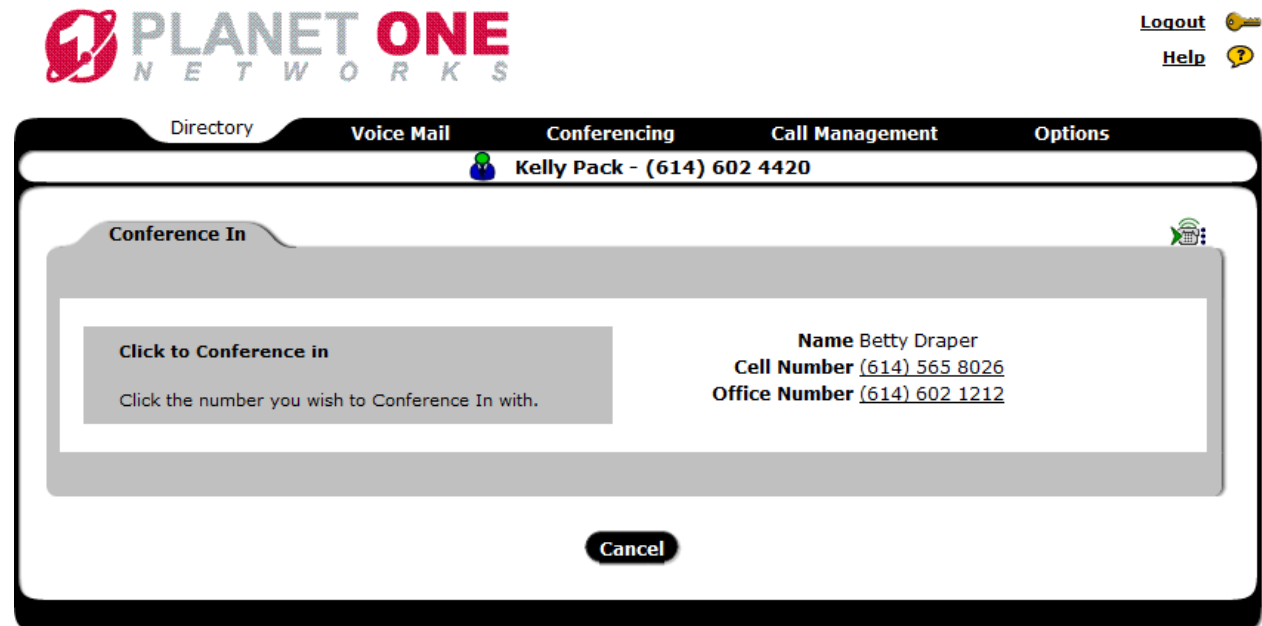


Figure 10 – Conference In Window

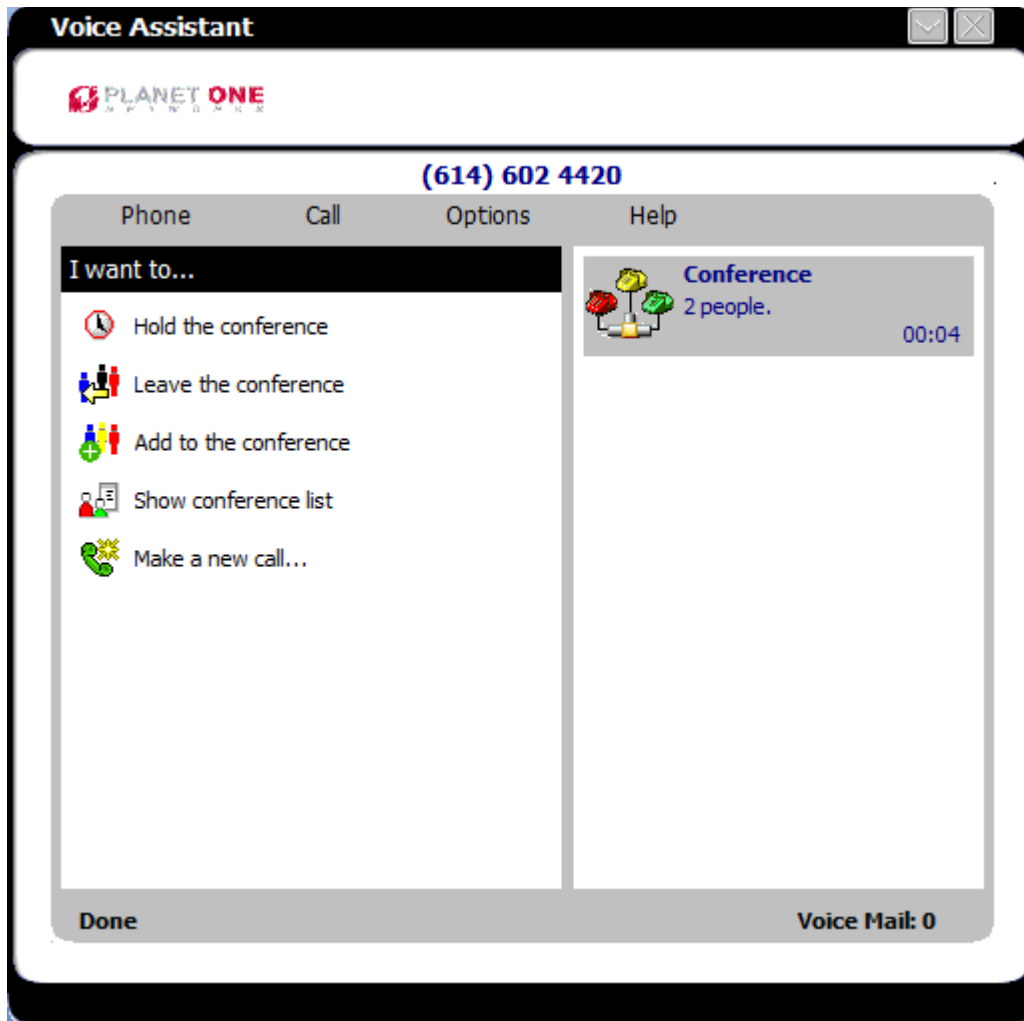


Figure 11 – Conference In - Options on a live call

The voice assistant window will appear and show you that you are conferencing two people. Then using the voice assistant you can perform the functions listed.