Panasonic

Quick Reference Guide for Communication Assistant
Pure IP-PBX

Model No.   KX-NCP500
KX-NCP1000

Thank you for purchasing a Panasonic Pure IP-PBX.
Please read this manual carefully before using this product and save this manual for future use.

KX-NCP500/KX-NCP1000: PBMPR Software File Version 1.0000 or later

Document Version: 2008/06

Introduction

Communication Assistant (CA) is a Computer Telephony Integration (CTI) application that integrates with your Panasonic PBX, and allows you to perform many 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 Communication Assistant.

The Quick Reference Guide is divided into the following sections:

1 Specifications

This section provides general information about the features in Communication Assistant.

2 System Connection Diagram

This sections shows how Communication Assistant fits into your network.

3 System Requirements

This section provides the minimum and recommended system requirements for installing Communication Assistant on a PC.

4 Software Installation

This section explains how to install and uninstall Communication Assistant.

IMPORTANT

CA stores personal information. In order to prevent data theft and leakage, we recommend the following:
- Set a screen saver to require a password when you do not use your computer after a certain amount of time.
- When users change extensions, make sure that the access rights for their extensions are correct.
- Set a login password that is at least 5 characters long, and contains a combination of letters and numbers.

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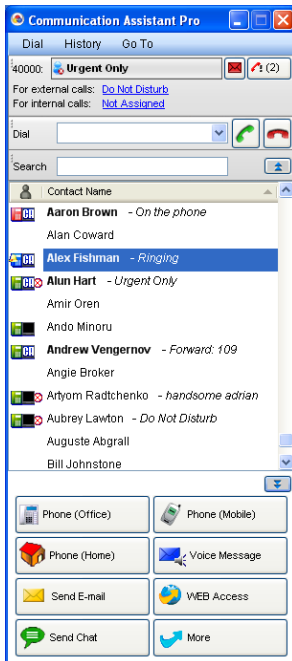
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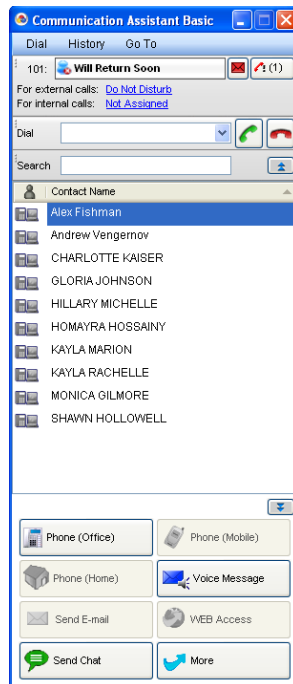
1 Specifications

Features

Contact List with Presence

You can easily make calls using a customizable 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 Pro Contact List   **CA Basic Contact List**   **Presence Window**

- When you receive a call, information about the caller is displayed if it is registered in the contact list.
- While you are logged in, if you do not use your PC for a set amount of time, your absent message will be automatically set to the current weekday and time of your PC.
- The colour of the PC icon in the contact list shows the contact's login status:
  <PC blue icon>: The user is logged in.
  <PC gray icon>: The user is logged in, but the auto absent message has been set.
  <PC black icon>: The user is not logged in.

CRM Integration

You can make calls directly from CRM (Customer Relationship Management) software using TAPI.
You can also make calls with Microsoft® Outlook® 2003/2007 without using TAPI. When you install CA on a PC, a new toolbar containing the Dial box, Answer button and Hang-up button is added to Outlook.

Note

This feature may not work with some CRM software depending on the software's specifications.

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.

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 dialled 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 establishing a conference.

IP Camera Integration (Panasonic HX-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).
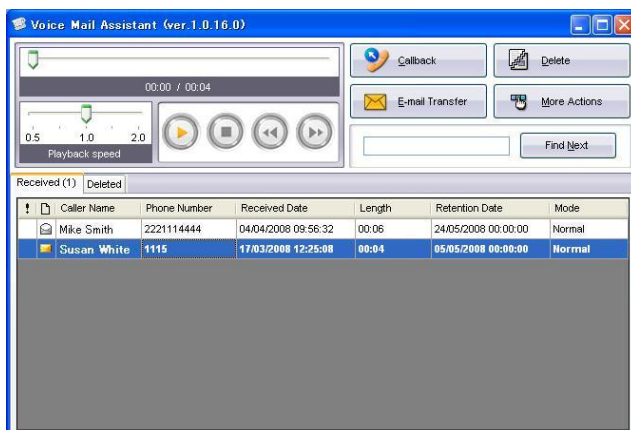
Note

> This feature requires Internet Explorer® version 6.0 or higher.

### Voice Processing System (VPS) Integration

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 Integration

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

- In order to use Voice Mail Assistant, the VM IP address must be set correctly.
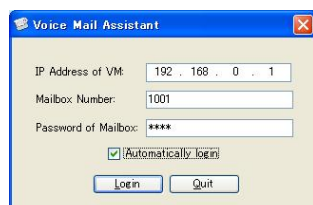
- Voice Mail Assistant uses 2 fixed ports: 20000 and 20001.
- You can customise your mailbox, such as setting the notification schedule.

Note

> This feature requires voice mail firmware version 2.1 (main software version 2.50 or later).

IP Softphone

You can use the built-in IP Softphone. A KX-NCS32xx 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 users. This feature is useful for tasks such as confirming whether a colleague is available for a phone conversion.
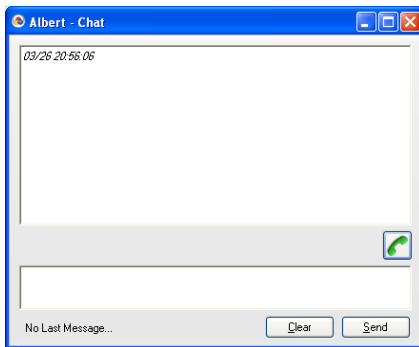

- A chat session uses 1 available port in the range 42525–42535.

System Speed Dial Control

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

Supervisor Features

If you log in to CA 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.
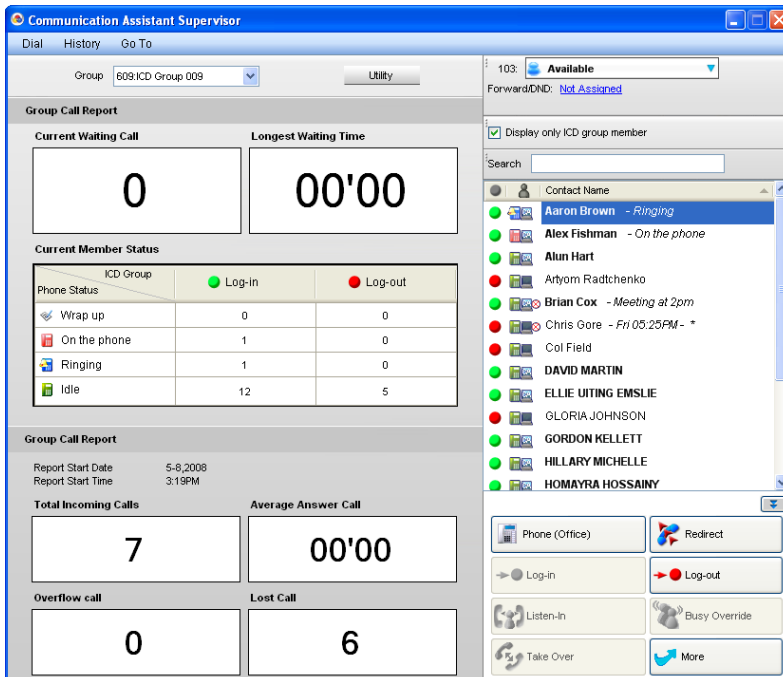
Note

- To use the listen-in function, your extension must have "Call Monitor" enabled in its class of service (COS) settings on the PBX.
- To use the busy override/take over functions, your extension must have "Busy Override" enabled in its class of service (COS) settings on the PBX.

Feature Comparison

CA has 3 operating modes: Basic, Pro, and Supervisor. The following table summarises the features available for each mode.

Feature	Basic	Pro	Supervisor
View other extensions' presence from main menu	No	Yes	Yes
Maximum number of contacts	10	1000	1000
Maximum history length	10 calls	1000 calls	1000 calls
ICD group login/logout	No	Yes	Yes
Listen-in/Busy override/Take over	No	No	Yes
ICD group supervisor	No	No	Yes

Note

- A CA activation key for the desired number of users must be registered in the PBX. See the KX-NCP500/KX-NCP1000 Installation Manual for details about the activation keys.
- You must enable CA mode for the extensions that will use CA in the PBX settings.
- To use Supervisor mode, you must set the appropriate extension as an ICD group supervisor in the PBX settings.
- CA Pro has a 60-day trial mode, where you can use all of the features of CA Pro without installing an activation key (CA Pro trial). The 60-day trial period begins once you have installed CA on a PC.
- Up to 5 users can use CA Basic without installing an activation key.

Login Capabilities

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

Login Mode/Software	No. of Users		Total
KX-TDA0350 PC Phone Software	128		
CA Basic	128		
CA Pro trial	2		Max. 128
CA Pro	8	Max. 8	
CA Supervisor	4		
KX-TDA0300 PC Console Software	8		

Dial Modification

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

Example

Copy a telephone number on another application software.

```
hank you very much for your time.

***************************************
ichael Victor

ukuoka Kikaku

hone: +81-92-123-4567
ax:    +81-92-123-5678
***************************************
```
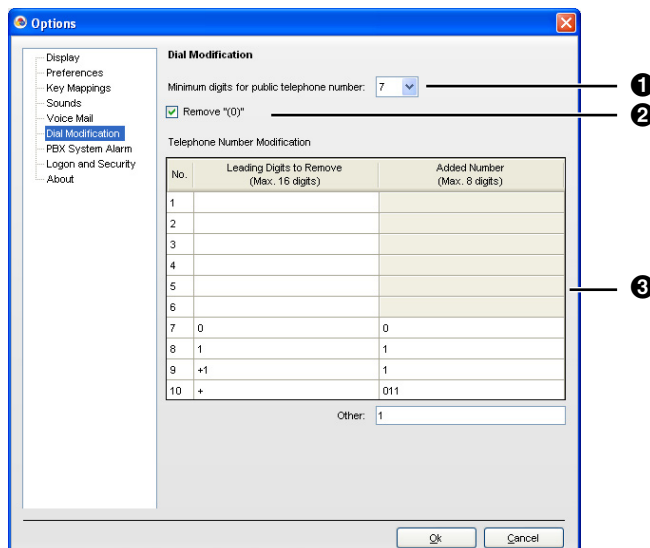
Paste the number into CA's dial box by pressing CTRL+V.
<screen shot: 901181921234567>
The telephone number is modified automatically, as programmed by the user.

1. On the **Go To** menu, select **Options**, and then select **Dial Modification**.
   The following window is displayed:

❶ **Minimum digits of 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.
1234576 = 7 digits → External telephone number
123456 = 6 digits → Not an external telephone number

❷ **Remove "(0)"** check box
Deletes the string "(0)" from a copied external telephone number.
[Example]
+81-(0)1-2345-6789P12 → +81-1-2345-6789P12

❸ **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 of public telephone number**, **Remove "(0)"**, and the **Telephone Number Modification** table as desired.

3. Restart CA for the changes to take effect.

Conditions

- Digital proprietary telephones (DPTs), analogue proprietary telephones (APTs), IP proprietary telephones (IP-PTs), IP softphones, portable stations (PSs), and single line telephones (SLTs) can be used with CA.
- A CA user who logs in using an SLT extension cannot use the hold retrieve function in CA.
- Call control functions, including making calls, are not supported with a PS.
- When logging in to CA, if you enter the wrong password for a given extension number a pre-programmed number of times, the CA password will be locked. When this happens, the extension PIN is also locked. When the PIN lock is cleared by using PT Manager programming, the CA password and CA password lock are also cleared.
- The VM menu feature for a display PT should be disabled in the class of service (COS) settings on the voice processing system (VPS). If it is not disabled, you cannot record a VM greeting message in CA.
- The contents and design of the software are subject to change without notice.

2 System Connection Diagram

The figure below illustrates an example network setup using CA.

Remote Office
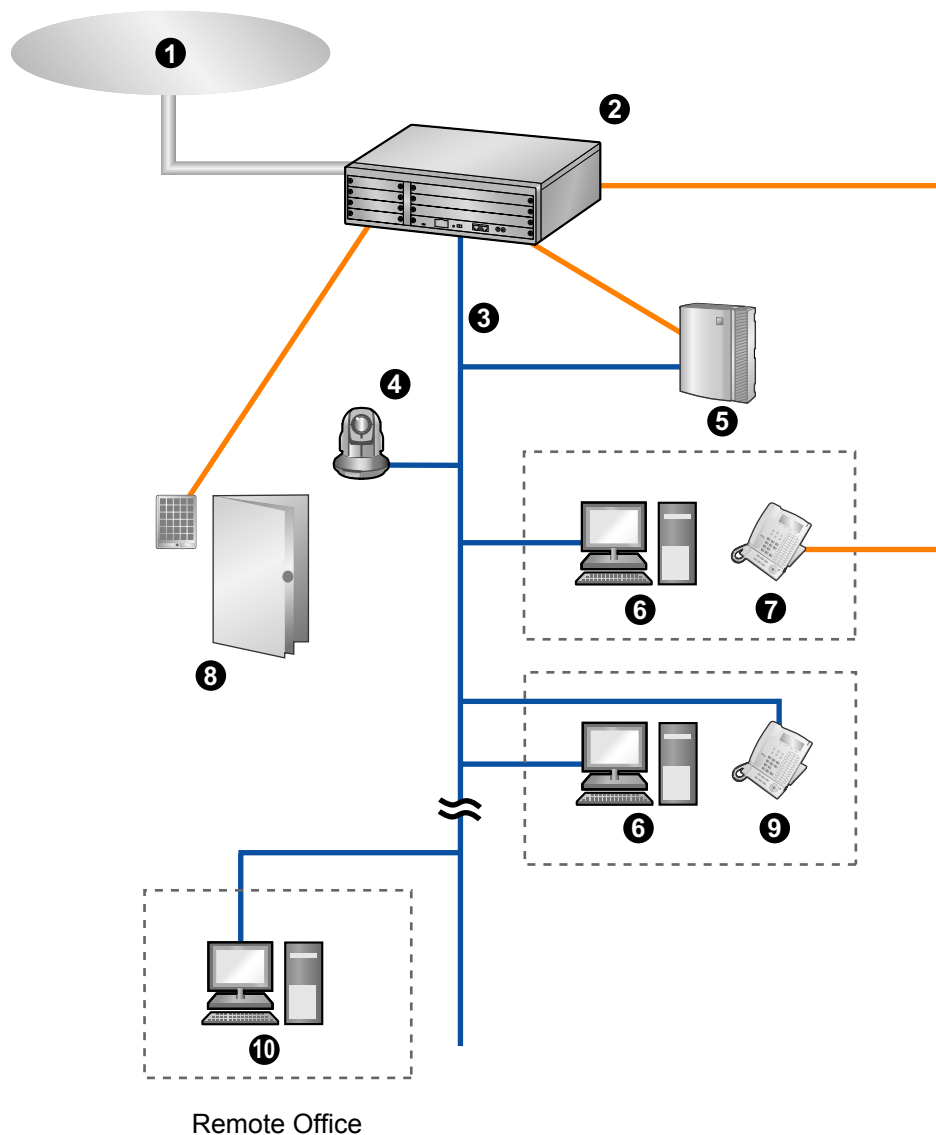
❶ Telephone Company
❷ Panasonic KX-NCP Series PBX
❸ LAN
❹ Panasonic Network Camera
❺ Voice Processing System
❻ PC running CA
❼ Proprietary Telephone or Single Line Telephone
❽ Doorphone and Door Opener
❾ IP Proprietary Telephone
❿ PC running CA with Softphone

3 System Requirements

The table below summarises the minimum and recommended requirements for running CA.

	Minimum	Recommended
CPU	1.0 GHz Intel® Pentium®/Celeron® process-or or comparable CPU	2.0 GHz Intel Pentium/Celeron processor or comparable CPU
RAM	128 MB	512 MB
OS	Windows® XP Professional Windows XP Home Edition Windows Vista®	Windows XP Professional Windows Vista
Hard Disk	1.5 GB available space	2.0 GB available space
Video Resolution	1024 × 768	1280 × 1024
Interface	10Base-T	100Base-T

4 Software Installation

4.1 Installing and Starting Communication Assistant

1. Double-click "Setup.exe", and follow the on-screen guidance to install CA.
   <setup.exe icon>
2. When installation has finished, CA automatically starts. The screen below is displayed.
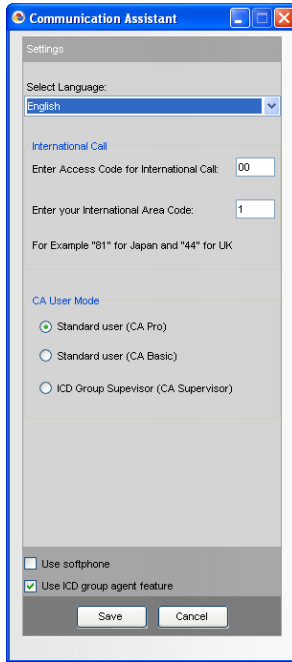
Select the display language, enter your international call access number and international area code.
**You must enter your international area code in order to proceed.**

Select your operating mode:
- Standard user (CA Pro): Log in using Pro mode.
- Standard user (CA Basic): Log in using Basic mode.
- ICD Group Supervisor (CA Supervisor): Log in using Supervisor mode.

Note

See Feature Comparison (Page 7) for a summary of the different modes.

3. Click **Save**.

4. Enter the IP address of the PBX you are connecting to, your extension number, and password.
If this is the first time you are logging in for the extension, leave the password blank.
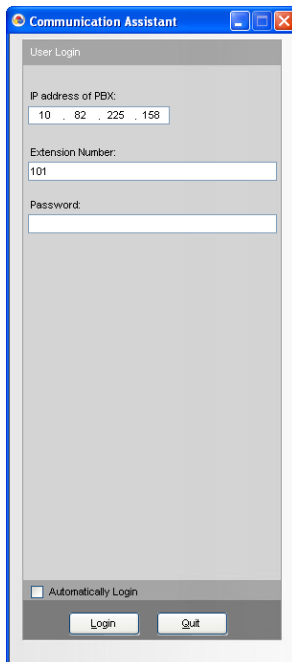
5. If you are allowed to log in with a blank password, a dialogue box is displayed prompting you to create a password. Enter a password in **New Password**, and then re-enter it in **Verify Password**.
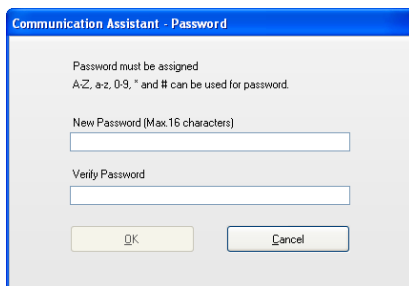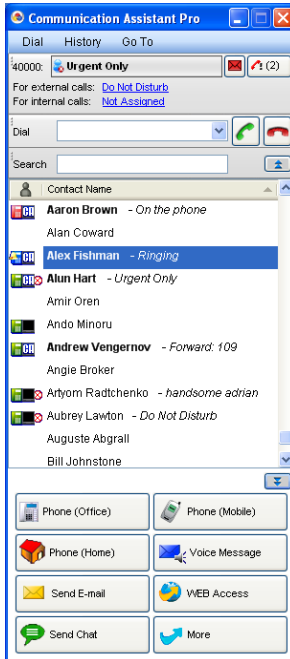

Click **OK**.

IMPORTANT

In order to prevent unauthorised access to your CA 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 main screen is displayed.

4.2 Uninstalling Communication Assistant

1. To uninstall CA, perform one of the following procedures.
  - On 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**.