



BroadWorks Receptionist

Administration Guide

Release 14.sp6

Document Version 1



BroadWorks® Guide

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1 Introduction

1.1 About This Guide

This guide is designed to provide information about planning, installing, and configuring BroadWorks Receptionist. This document is not intended to supplement or replace the hardware manufacturer's instructions for equipment installation, maintenance, and support. This document assumes that BroadWorks Receptionist customers have a clear understanding of the underlying operating system and associated hardware. Customers should also have a working knowledge of the purchased access and network devices of our partner companies.

BroadWorks Receptionist is herein referred to as Receptionist.

1.2 Overview

Receptionist software is usually deployed from the service provider's website to the end user's desktop.

For Receptionist to communicate with the BroadWorks servers, the client software requires the BroadWorks Open Client Server (OCS) that is part of the Web Server option. In this document, some references will be made to OCS. For information on the Web Server, see the *BroadWorks Web Server Configuration Guide*.

1.3 Audience

This document is intended for anyone responsible for the deployment and management of Receptionist. The document is intended for network administrators and systems integrators to install Receptionist for end-user console activities on the BroadWorks platform.

1.4 Additional Resources

For Application Server procedures used by group administrators, department administrators, and users, see the following BroadWorks guides:

- BroadWorks Application Server Group Web Interface Administration Guide (Part 1 and Part 2)
- BroadWorks Application Server User Web Interface Administration Guide

To customize the CommPilot web portal, see the *BroadWorks Application Server Web Portal Customization and Localization Guide*.

For the Web Server procedures, see the *BroadWorks Web Server Command Line Interface Administration Guide*.



2 BroadWorks Overview

Receptionist is a carrier class IP Telephony attendant console for receptionists, or telephone attendants, who screen inbound calls for enterprises.

Receptionist delivers the following real benefits to users:

- An ergonomic design that follows the natural work "flow" of a call from the top to the bottom of the screen
- Improved business processes, as only valid options are presented to the attendant
- Professional call handling, as critical information is available in "real time"
- Accurate delivery of messages via a one step process when people are unavailable
- Integration with BroadWorks Call Center

Receptionist is an intuitive attendant console that manages high volume call distribution for front-desk operators through remote control of their desk phone. In addition to integrated contact status and messaging, it has many other features that include call statistics and integration into enterprise-level repositories and services.

Receptionist requires the BroadWorks Web Server for access to BroadWorks services.

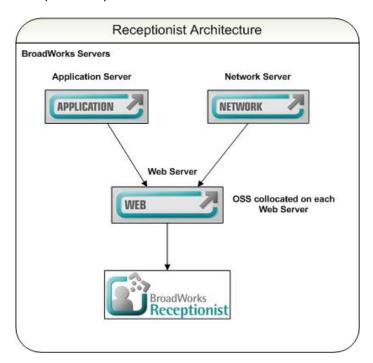


Figure 1 Receptionist Architecture



3 Hardware and Software Requirements

The requirements listed here are the minimum requirements for proper Receptionist behavior. It is strongly recommended that computer systems intending to run Receptionist have capabilities that exceed these.

3.1 Operating System

Receptionist is deployed on the Microsoft Windows platform and/or Citrix Presentation Server platform.

3.2 Hardware Requirements

Microsoft Windows Platform

The hardware requirements for Microsoft Windows platform include:

- 1.2 GHz or higher, Pentium 3, or compatible CPU
- 512 megabytes (MB) of RAM recommended minimum (more memory generally improves performance)
- 60 MB available hard disk space
- Video Graphics Card with minimum of 8 MB RAM
- Super VGA Monitor (15" or larger)
- 800 x 600 screen resolution minimum (1024 x 768 is recommended)
- TCP/IP connectivity to the BroadWorks Open Client Server on port designated by service provider (default port is 2208):
 - Lab Environment: Collocated with BroadWorks Application Server
 - Live Environment: Collocated with the BroadWorks External Web Server

Citrix Presentation Server Platform

The hardware requirements for the Citrix Presentation Server include:

- 2.0 GHz or higher, Pentium 4, or compatible CPU
- Minimum 2 GB of RAM
- 60 MB free disk space per application installation
- TCP/IP connectivity to the BroadWorks Open Client Server on port designated by service provider (default port is 2208):
 - Lab environment: Collocated with BroadWorks Application Server
 - Live environment: Collocated with the BroadWorks External Web Server

Citrix ICA Client Workstation

The hardware requirements for a Citrix ICA client workstation include:

- 1.2 GHz or higher, Pentium 3, or compatible CPU
- 128 megabytes (MB) of RAM

BROADWORKS RECEPTIONIST ADMINISTRATION GUIDE

Video graphics card with 8 MB of RAM minimum



- 800 x 600 screen resolution minimum
- Network connection of minimum 56 KBps speed

3.3 Software Requirements

The software requirements include:

- Windows 2000 with SP4 (or higher), Windows XP, Windows Vista, or Citrix Presentation Server 3 or 4
- Windows Installer 2.0
- Sun Microsystems Java 2 Standard Edition (J2SE) Runtime Edition Versions:
 - Java 5 Update 11 (or higher maintenance releases) or Java 6 Update 2 (or higher maintenance releases)
- Internet Explorer 6.0 or later (optional; used for web-based JRE auto-download in Deployment Studio samples)
- Microsoft Active Directory has been tested and supported for LDAP integration
- Squid Web Proxy Server has been tested and supported for silent updates

Citrix Server Impacts:

- The application can be published on to a Citrix server via the Management Console for MetaFrame.
- Sun Microsystems Java 2 Standard Edition (J2SE) Runtime Edition Versions:
 - Java 5 Update 11 (or higher maintenance releases) or Java 6 Update 2 (or higher maintenance releases)

Citrix Workstation Impacts:

■ The Java Virtual Machine is not required on the workstation in this deployment style

3.4 Platform Requirements

The platform requirements include:

- For installation, a Windows user account with administrative rights
- For post installation, a Windows user account with the following rights are required:
 - Registry HKEY LOCAL MACHINE hive
 - Read
 - Enumerate
 - Query
 - Registry HKEY_CURRENT_USER hive
 - Full Access
 - Receptionist install Directory
 (Default C:\Program Files\BroadSoft\BroadWorks Receptionist)
 - Write
 - Read



Execute

NOTE: Some features require a specific version of the BroadWorks platform to be available. To make sure you have the minimum requirements to use these features, consult the compatibility matrix in the *BroadWorks Receptionist Feature Description*.

3.5 Interoperable Phones

All phones that have undergone successful interoperability with the BroadWorks platform are supported for basic call control capabilities.

Enhanced call control functions are capable with phones that comply with the advanced call control specification from BroadSoft, described in the *SIP Access Side Extensions Interface Specification*. Ensure the firmware revision used supports the version of the BroadWorks platform you are running.

To determine the features your phone supports, including the number of available call appearances and support for the *Advanced Call Control Specification*, refer to the corresponding BroadSoft Partner Configuration Guide.

NOTE 1: Functionality may vary with network configurations, topologies, and firmware. For further information, see the BroadSoft third-party device interoperability guides from the specific phone vendor documentation.

NOTE 2: Specifications are subject to change at the vendor's discretion.



4 Installation

4.1 Operating System Installation

Receptionist is supported on Windows 2000/XP/Vista and Citrix Presentation Server 3 and 4 operating systems for Windows 2000 and Windows 2003 Editions (32-bit or 64-bit). For information on the operating system, see section 3 Hardware and Software Requirements.

NOTE: Receptionist Enterprise may have a server performance impact if the default maximum contact monitoring value is increased in Deployment Studio.

4.2 Install Receptionist

A typical installation of Receptionist is depicted in the following diagrams. This illustrates a standard windowed installer (non-silent) wizard:

1) Double-click on the BroadWorks **Receptionist Install** executable.

The first page of the Installation Wizard appears.



Figure 2 Receptionist Installation Wizard - Page 1



2) Click Next.

The second page of the Installation Wizard appears.



Figure 3 Receptionist Installation Wizard - Page 2

- 3) To select a different folder, click **Browse**. Make your selection to add the folder to the *Wizard* dialog box.
- Click Next.

The third page of the Installation Wizard appears.

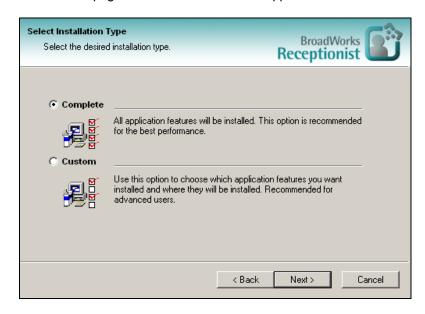


Figure 4 Receptionist Installation Wizard – Page 3

5) Select the type of installation, either *Complete* or *Custom*.



6) Click Back to modify the installation directory or click Next to proceed with the installation.

If you select **Next**, the fourth page of the Installation Wizard appears.

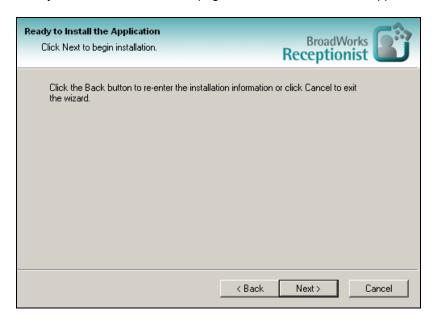


Figure 5 Receptionist Installation Wizard - Page 4

7) Click **Next** to begin the installation.The fifth page of the Installation Wizard appears.

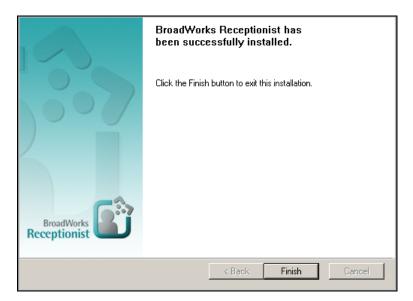


Figure 6 Receptionist Installation Wizard – Page 5

8) Click **Finish**. The installation is complete.



NOTE: Regarding Citrix Application Publishing mode, the Desktop application (seamless/non-seamless) is not supported. Desktop terminal services mode is supported.

4.3 Start Receptionist

Navigate to the Start menu, followed by All Programs, BroadSoft, and BroadWorks Receptionist, and click the BroadWorks Receptionist shortcut.

For descriptions of how to use and configure Receptionist, see the *BroadWorks Receptionist User Guide*.

4.4 Upgrade Receptionist

This section describes the upgrade process for Receptionist. Receptionist checks for updates during each session.

NOTE: Regarding Citrix Server impacts, application upgrades are to be performed when there are no application instances in operation. Administrators are advised to employ maintenance schedules for upgrades.

To upgrade Receptionist:

- 1) Launch Receptionist from the Start menu.
- 2) If a new update is found, you are prompted to download the package (as long as the update settings are configured).
- Select Next to begin downloading the new installation. Once the download completes, the new version installation is automatically started and an upgrade process takes place.

For information on installing Receptionist, see section 4.2 Install Receptionist.



4.4.1 Proxy Settings

Receptionist supports the HTTP proxy for web upgrades. Set these in the *Receptionist Options - Updates* dialog box if web traffic on the local network is directed through a proxy. The required fields can be obtained from the network administrator or service provider.

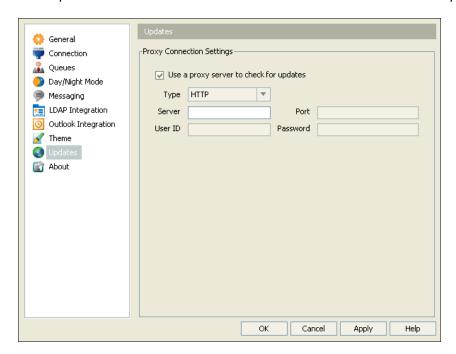


Figure 7 Receptionist Options – Updates

NOTE: Proxy Connection Settings are only used for the silent upgrade checking mechanism, and not for the OCS connection.



5 Service Provisioning

5.1 License

Before running Receptionist, log in to the BroadWorks Application Server (AS) through CommPilot, and assign the necessary services to the user, to access Receptionist.

To provision Receptionist:

- Log in to BroadWorks Application Server using a system administrator or group administrator.
- 2) Navigate to provision the Receptionist service.
- 3) Assign the following required services to this user depending on the BroadWorks release you have.

BroadWorks Release	License
≤ 14.sp2	BroadWorks Receptionist (Client License 4)
14.sp2 or higher Activated ¹	BroadWorks Receptionist – Enterprise
14.sp2 or higher Activated ²	BroadWorks Receptionist – Small Business
14.sp2 or higher Activated ²	BroadWorks Receptionist – Office



Figure 8 User - Assign Services

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¹ Requires activation of feature 44260b (Monitored User Selection). Requires activation of feature 30610 (CAP MonitoredUserId).

² Requires activation of feature 44260a (Small Business and Office Receptionist).



5.2 Configuration for Release 14.sp2 (De-activated) or lower

1) The default monitoring style in Receptionist uses dynamic monitoring; however if you wish to constantly monitor the status of a particular set of users (static monitoring), you must also assign the Phone Status Monitoring service. After assigning the service, navigate to the *User – Phone Status Monitoring (PSM)* page.



Figure 9 User – Phone Status Monitoring

2) Make sure that all contacts you wish the operator to monitor are in the *Monitored Users* list box. All other contacts that are in the *Unassigned Users* list box have their monitoring status handled dynamically in Receptionist.



5.3 Configuration for Release 14.sp2 or higher (Activated)

Each Receptionist license varies in its support for contact monitoring. The following table describes the capabilities:

License	Contact Directory Scope	Static Monitored Users	Dynamic Monitored Users
BroadWorks Receptionist – Enterprise	Enterprise	Maximum 200 (Configurable up to 1000 using CLI)	Maximum 300 (Configurable using DSI)
BroadWorks Receptionist – Small Business	Enterprise	Maximum 30	N/A
BroadWorks Receptionist – Office	Group	Maximum 8	N/A

NOTE: If the Receptionist – Enterprise feature has been activated on BroadWorks, then *PSM* is no longer assignable and static monitoring of contacts is integrated into the *Receptionist – Enterprise Service Provisioning Portal* page.



The default monitoring style in Receptionist uses dynamic monitoring; however if you wish to constantly monitor the status of a particular set of users (static monitoring), you must make sure that all contacts you wish the operator to monitor are in the *Monitored Users* list box with respect to the licensing limitations described in the table above. Following are examples of each license page:



Figure 10 User - BroadWorks Receptionist - Enterprise

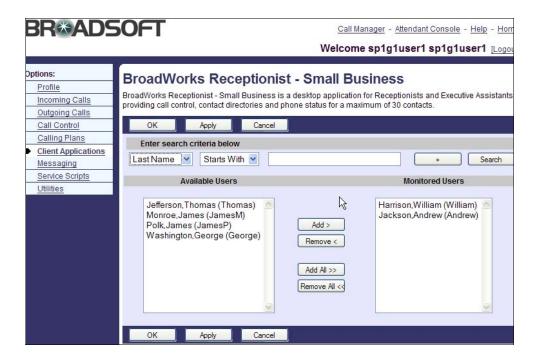


Figure 11 User - BroadWorks Receptionist - Small Business



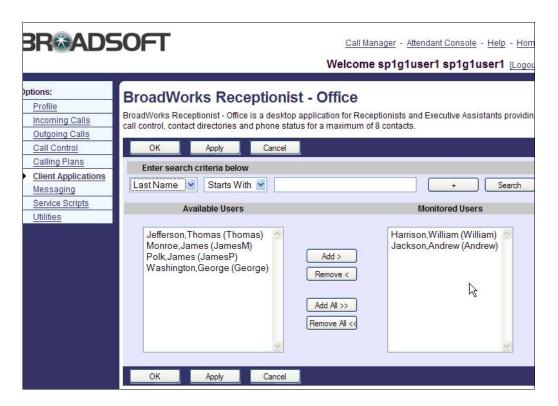


Figure 12 User - BroadWorks Receptionist - Office

2) Make sure that all contacts you wish the operator to monitor are in the *Monitored Users* list box. All other contacts that are in the *Unassigned Users* list box have their monitoring status handled dynamically in Receptionist.



5.4 Configure Custom Contact Directories

To create a custom contact directory of users within a group or enterprise, complete the following instructions:

- Log in to BroadWorks Application Server using a system administrator or group administrator.
- 2) Navigate to provision the Receptionist service.
- 3) In the Options menu, select Utilities.

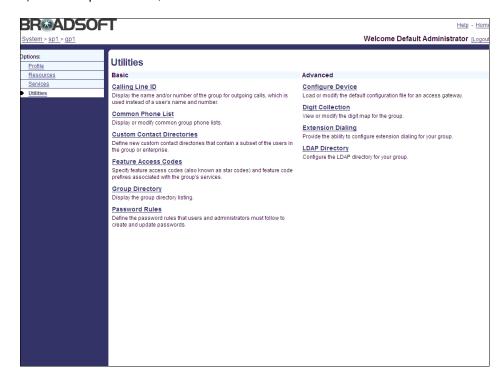


Figure 13 Utilities Menu

- 4) Click on *Custom Contact Directories*. A list of the current Custom Contact Directories is on display.
- Click Add.





Figure 14 Custom Contact Directory Add Page

- In the *Directory Name* text box, type the name the directory is to be called from now on.
- 7) Enter how you want the search criteria to be sorted under the *Enter search criteria* below box.
- 8) Select the users you want in the custom directory from the list of *Available Users*. Click **Add** or alternatively, click **Add All**. To remove a user from the list, click **Remove** or **Remove All**.

NOTE: A maximum of 1000 users can be assigned to one directory.

9) Click OK.



5.5 Configure Queues

- 1) To access queues from Receptionist, assign the Call Center service to your group.
- 2) If the Call Center service is assigned, navigate to the *Group Call Center Profile* page.

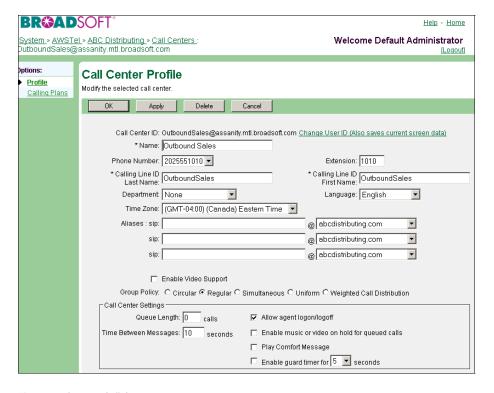


Figure 15 Group - Call Center

- Make sure that each of the Call Centers has a check mark in the Allow agent logon/logoff check box (repeat this step for each Call Center). For information on adding Call Centers, see the BroadWorks Application Server Group Web Interface Administration Guide (Parts 1 and 2).
- Assign the users to be members of this Call Center (these are the BroadWorks Receptionist licensees).



3) Navigate to the Call Center – Assign Services page.

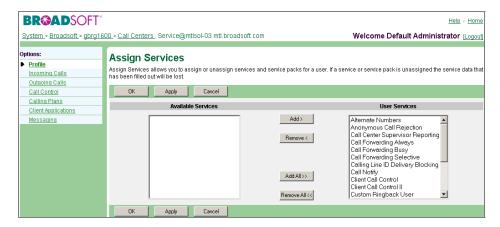


Figure 16 Call Center - Assign Client Call Control Service

Assign Client Call Control service (and any other services you want the Call Center to have, such as Voice Messaging User service).

NOTE: The previous step is necessary for queue monitoring information to be sent to Receptionist.

- 4) To save your changes and display the previous page, click **OK**.
- 5) To exit without saving, select another page or click **Cancel** to display the previous page.

NOTE: The appropriate services in *Step 3* must be assigned to the operator; otherwise Receptionist cannot be used. If your CommPilot web portal does not contain the client licenses listed above, contact a BroadSoft representative about obtaining the necessary license files.



6 Uninstallation

The following figures show a typical uninstallation of Receptionist.

1) Click **Start**. Navigate to *Control Panel* from the list and select *Control Panel*.



Figure 17 Start Drop-down List – Control Panel Button

2) In the dialog box, click **Add or Remove Programs**.



Figure 18 Add or Remove Programs Button

- 3) Scroll down the list until BroadWorks Receptionist is visible.
- 4) Click Remove.



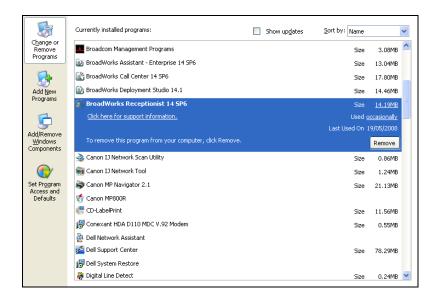


Figure 19 Remove BroadWorks Receptionist

- 5) A dialog box appears to confirm that you want to remove the program.
- 6) Select Yes.



Figure 20 Add or Remove Programs Dialog Box

NOTE: Receptionist only uninstalls items that are known to the installer. Anything created independently of the installer post installation is not removed. User-defined settings such as logs and Hive Key Current User (HKCU) information remain on your computer. This is because administrative privileges are required for uninstalling and may not correlate to the logged in user. In addition, it is desirable to retain certain user settings during upgrades. Therefore, some settings remain after removal if Receptionist is reinstalled.



6.1 Complete Removal of Receptionist

To completely remove the settings and logs (created by the application) that are not part of the original installation, follow the additional optional steps:

WARNING: This method shows you how to correctly modify the registry. If you modify the registry incorrectly, serious problems cam occur. Back up the registry before you modify it, so that you can restore the registry if a problem occurs.

1) Click **Start** and select *Run* from the list.



Figure 21 Start Drop-down List – Run Button

2) In the *Open* text box type "Regedit" and click **OK**.

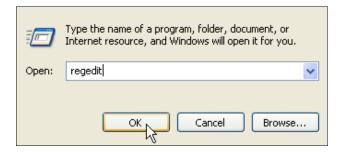


Figure 22 Run Dialog Box

3) In the Registry Editor click the expand button and navigate to HKEY_CURRENT_USER\Software\BroadSoft\BW Receptionist.



4) Right-click the folder and select *Delete* from the drop-down list.

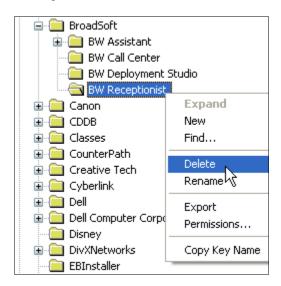


Figure 23 Registry Editor Drop-down List

5) Click **Start**, and then **My Computer**. Select the *C Drive* folder, and then *Documents* and *Settings*. Click the user who is currently logged ion.



Figure 24 Start Drop-down List – My Computer Button



 If hidden folders are not visible, from the top menu select Tools, and then Folder options.

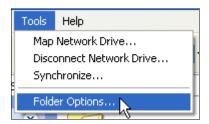


Figure 25 Tools – Folder Options

7) Click on the *View* tab. Under *Hidden files and folders*, click *Show hidden files and folders*, and then **OK**.

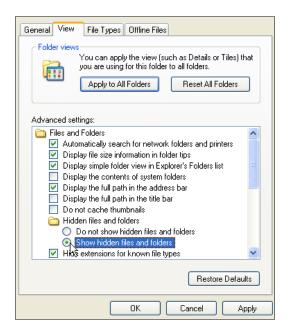


Figure 26 Folder Options - View Tab



8) Open the *Application Data* folder. Click the *BroadSoft* folder, and then *BW Receptionist*. Right-click the folder, and then select *Delete* from the list.



Figure 27 BroadWorks Receptionist Drop-down List



7 Operational Scenarios

You can use Receptionist in a number of different operational scenarios. Additional BroadWorks services need to be assigned and configured to support these scenarios and provide a strategy that would complement the usage category and still provide a level of freedom between the softswitch and the client application software. Common operational scenarios and recommended configurations include:

Scenario	Description	Solution
After Hours	Allows operators to automate switching from day/night mode and also configure options such as Call Forwarding and Voice Mail after business hours.	Use the day/night mode in the Options tab to select night mode options. Receptionist automatically handles context switching between day and night operational modes during login/logoff.
High Traffic	More than one attendant console managing multiple dedicated mainline numbers.	For each mainline dedicated number, configure a Hunt Group consisting of all Receptionist users (or operator numbers). This allows incoming calls to be directed to the next available receptionist in high volume overflow situations.
Hot-Desk (Hoteling)	Allow multiple part-time operators to share a single logon in sequence when they change shifts. (Note that licensing does not support simultaneous logons.)	Operators can log in according to the sequence based on rosters from single or geographically disbursed locations, using the same login credentials. Concurrent logons simply logoff current sessions.
Low Traffic	Single receptionist answering one or more dedicated mainline numbers.	Configure all dedicated mainline numbers to Call Forward All to the Receptionist user (or operator numbers). Additionally you may setup Call Forward Busy and Call Forward No Answer to redirect calls to an alternative destination to cover an overflow situation.
Multi-Tenanted or Executive Offices	One or more operators answering calls on behalf of different organizations. Typically there is a dedicated mainline number for each organization and the operator greets the caller based on the number.	Create a mainline (or several mainline) Direct Inward Dialings (DIDs) for each organization and set each line to use the Call Forward Always service, redirecting the mainline DID to the number set for the Receptionist user (or operator numbers). The Call To field now displays each organization's mainline number for inbound calls.
Network Attendant Console	Geographically dispersed operators supporting each other in an enterprise configuration. Calls that cannot be handled at one location for any reason are answered at the other.	Use a combination of the Hunt Group, Call Forwarding Busy, and Call Forwarding No Answer services to either handle overflow or simply redirect calls from one Receptionist user (or operator numbers) to another.



Scenario	Description	Solution
Queued Receptionist (Agent) Pool	Alternative high traffic solution that allows maximum flexibility by integrating fully with Call Center service.	Use a combination of Auto Attendant and Call Center(s), to front end traffic to a Receptionist pool acting as agents for inbound traffic distribution. Additional services maybe assigned to Call Center to handle overflow such as Voice Messaging User.
Optional Voice Mail User	Operator has the added ability to transfer calls to voice mail for contacts in a group/enterprise that are busy or unavailable.	The Voice Messaging User service must be set assigned for any user in a group so the Voice Mail Call option is enabled in Receptionist.



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