



Presence Manager

Get started

TeamView® Presence Manager - Get started



The purpose of the application



To ensure optimal service to customers and partners.

Each employee is provided with an easy to use tool that continuously and effectively helps him to brief his colleagues about his current availability.

Presence Manager ensures that employees who uses other TeamView® applications (Switchboard and Contact Centers) on daily basis, at all times maintain an accurate picture of all their colleagues current availability.

Presence Manager offers the following features:

- Call forwarding based on cause of absence
- Change status of a colleague
- Aut. absence and forwarding on calendar appointments
- Recording of activities directly in the application

Note



Configuring Presence Manager is individual from organization to organization.

Therefore, it may be appropriate to change these instructions to exactly match your company's configuration.

This instruction is divided into 2 sections

Daily Use

- Aktivering og simpel viderestilling
- Activation and simple call forwarding
- Call forwarding with cause of absence
- Activity summary
- Change status of a colleague
- Warning at login and activity conflicts

Configuration

- Cause of absence – texts and icons
- Cause of absence – the visual result
- Activities – rules
- General configuration
- Integration to calendar system
- Call forwarding



The screenshot shows a window titled "Presence planning" with a table of absence events. The table has three columns: "Time", "Absence", and "Destination". The events are as follows:

Time	Absence	Destination
29-07-2010 09:07:49	Avilable	-
29-07-2010 09:34:00	Begin Syg	123
29-07-2010 09:43:00	Begin Ferie	123
29-07-2010 09:43:59	End	-
29-07-2010 09:44:00	Begin Møde	123
29-07-2010 09:45:59	End	-

Configuration

- Fraværsårsager – tekster og ikoner
- Cause of absence – texts and icons
- Cause of absence – the visual result
- Activities – rules
- General configuration
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- Call forwarding

Note • This section deals primarily with issues handled by the central administration, but the individual user may well be interested in being informed about these in order to ensure the best possible understanding of the application's options and features.



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Cause of absence – texts and icons

- Before the application is applied, there is created a set of cause of absences and related icons, which then appears as an integral part of Presence Manager. The following table shows examples of these.



Maternity leave



Vecation



Ill



Meeting



Gone
For today



Lunch



Short
absence

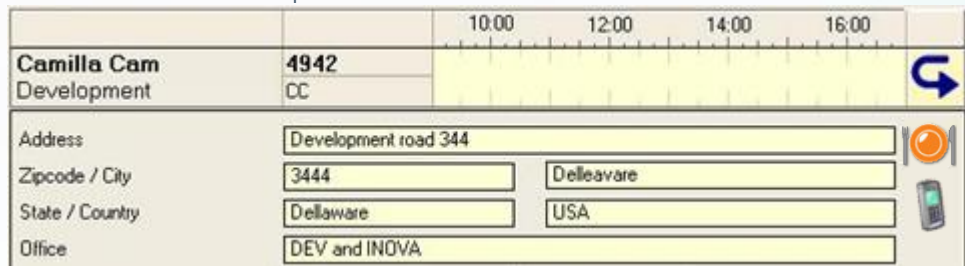


Other

Cause of absence – the visual result

The following extract shows how cause of absences (in this case Lunch) are presented in the other TeamView® applications.

TeamView® Unified Operator



TeamView® Office Manager



Activities - rules

- Each activity (cause of absence) is associated with a rule which specifies how the activity is presented to the user when he/she registers an activity of this type (start/end)

You can choose among the following 4 rules:

Automatic activation/termination	Typical for
<i>Known start- and end time</i>	Dept. meeting
Automatic activation/manual termination	Typical for
<i>Known start time/unknown duration</i>	Cust. meeting
Manual activation/automatic termination	Typical for
<i>Unknown start time/known duration</i>	Lunch
Manual activation/termination	Typical for
<i>No rules</i>	Ill

All manual activation (controlled by the user) enters into force immediately when the activity is registered.

General configuration



There are also carried out a general configuration, covering all users. Below are topics that may be of interest to users.

- Exclude call forwarding to selected numbers - ex. external numbers
- Exclude call forwarding to the individual users mobile phone
- Adapt/exclude integration to calendar system
- Enable/disable function to change the status of colleagues
- Permission to change the call forward no. (overwrites standard choice)*

* If writing SAC (send all calls) instead of a number, then apply the rule defined on the telephone system (for that user). If a rule is not defined on the telephone system, the call forward is not executed.

Integration to calendar system

- Presence Manager ensures that information about calendar appointments are transferred to the TeamView® DB, in order to set absence and call forwarding related to appointments start/end.
- Appointments where the user is registered as free are not processed.
- Centrally there is set up rules for how the user provides information about the cause of absence to associate with the individual appointment (written in the subject field of the calendar system). It is possible to choose singular codes or a relevant text that may be included in the beginning, middle or end of the text in the subject field

Example (code)

Example (text) - here "meeting"

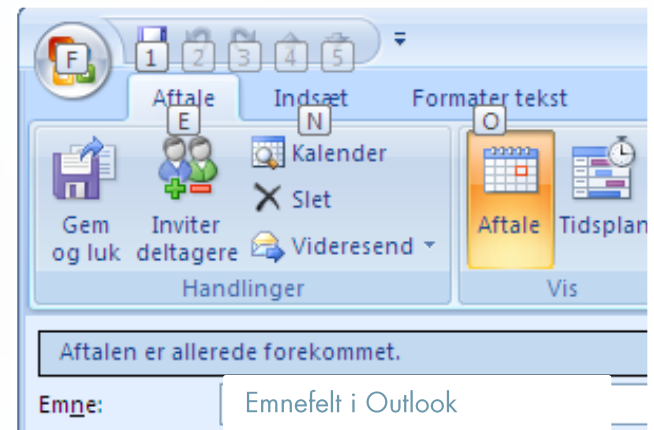
F1 (=lunch), M2 (=meeting)

Meeting with customer (start of text)

Departmental meeting (end of text)

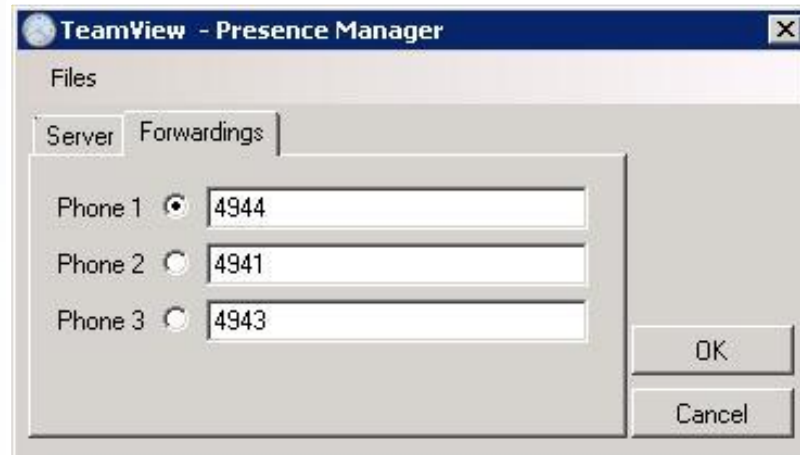
(or just) Meeting

There may be a "standard" absence (eg. Meeting), which is used if there is no match to the text. A distinction is made between uppercase/lowercase letters.



Call forwarding

- You can register up to 3 call forwarding numbers.
- The chosen number (marked by green dot) is used by default when activating a cause of absence that allows a personal call forwarding.



The screenshot shows a dialog box titled "TeamView - Presence Manager" with a close button (X) in the top right corner. The dialog has two tabs: "Server" and "Forwardings", with "Forwardings" selected. Under the "Forwardings" tab, there are three rows, each representing a phone number. Each row has a radio button to its left and a text input field to its right. The first row, "Phone 1", has a selected radio button (indicated by a green dot) and the number "4944" in the input field. The second row, "Phone 2", has an unselected radio button and the number "4941" in the input field. The third row, "Phone 3", has an unselected radio button and the number "4943" in the input field. At the bottom right of the dialog, there are two buttons: "OK" and "Cancel".

It is the individual user who registers these numbers (with respect to the centrally defined rules as described previously).

Daily use

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- Activity summary
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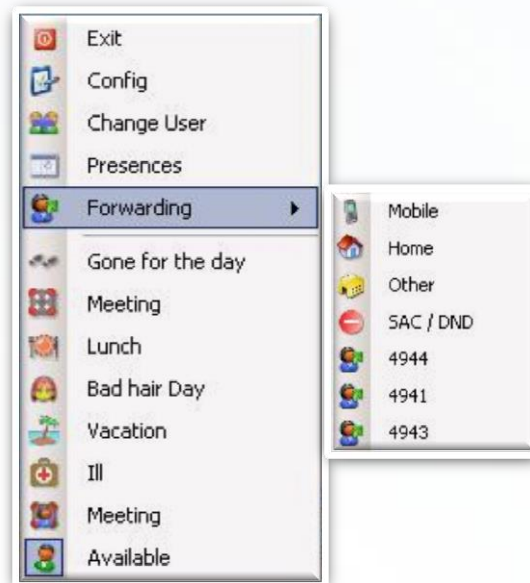


The screenshot shows a window titled "Presence planning" with a table of activity logs. The table has three columns: "Time", "Absence", and "Destination". The data rows are as follows:

Time	Absence	Destination
29-07-2010 09:07:49	Available	-
29-07-2010 09:34:00	Begin Syg	123
29-07-2010 09:43:00	Begin Ferie	123
29-07-2010 09:43:59	End	-
29-07-2010 09:44:00	Begin Møde	123
29-07-2010 09:45:59	End	-

Activation and simple call forwarding

- Presence Manager is located in the Systray, where - as the other applications here – is activated with a right click.
- After activation, click on the desired function, which is then performed according to the agreed configuration and related data.
- Clicking on forwarding (example below) pops a submenu, which displays the available options. If one of these are selected, only call forwarding (FW icon) or Send All Calls (SAC-icon) is performed.



Call forwarding with cause of absence



After activating the Presence Manager, click on the desired function (cause of absences icon), which is then performed according to the agreed rules.

If the rule associated with the selected icon require input from the user (manual activations/closures) pops template below. Then enter the data - followed by OK (only relevant fields are editable)

A screenshot of the 'Presence Settings' dialog box. The dialog has a title bar with a close button. It contains three input fields: 'Start at' with a date dropdown set to '3. marts 2011' and a time spinner set to '11:54'; 'End at' with a date dropdown set to '17. marts 2011' and a time spinner set to '11:54'; and 'Forward to' with an empty text input field. At the bottom right, there are 'OK' and 'Cancel' buttons.

If the selected cause of absences icon do not require user input (associated rule is "automatic activation/termination" the function will be executed immediately, and Presence Manager is disabled.

Activity summary



Clicking on “Presences “ displays the day's and future activities as registered directly in the Presence Manager and transferred from the calendar system.

Icon explanation

First column indicates source, second column shows the chosen cause of absence.

The 'Presence planning' window displays a table with the following data:

Time	Absence	Destination
29-07-2010 09:07:49	Available	-
29-07-2010 09:34:00	Begin Syg	123
29-07-2010 09:43:00	Begin Ferie	123
29-07-2010 09:43:59	End	-
29-07-2010 09:44:00	Begin Møde	123
29-07-2010 09:45:59	End	-

Activity source (first column)



Presence Manager (call forward/cancel)



Presence Manager (other activities)

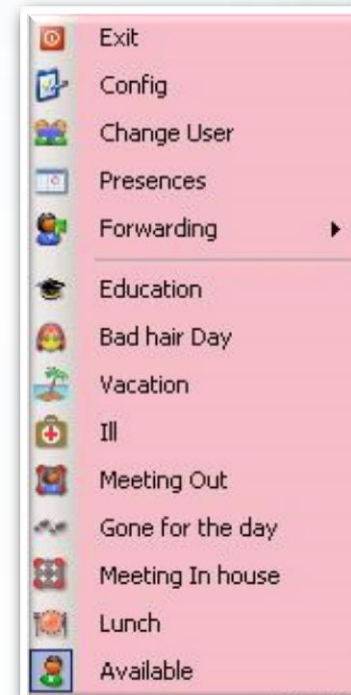


Company calendar system (appointments)

An activity can be deleted by right click on this.

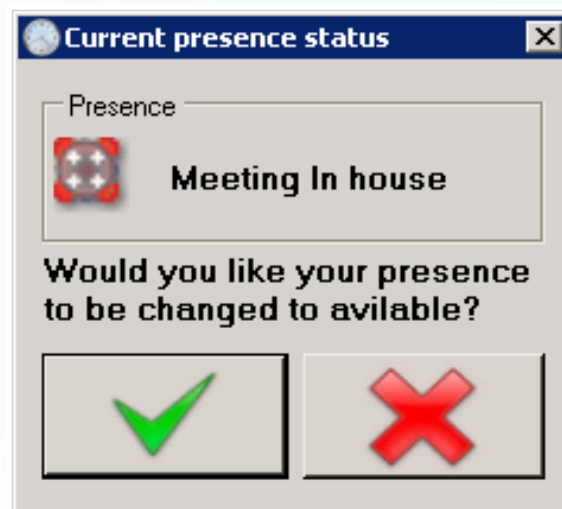
Changing the status of a colleague

- If you want to change the status of a colleague, click the menu item Change User and then - in the window that pops - enter the extension number of the colleague and press OK.
- Presence Manager switches then to a pink color to indicate that you are "working on a colleague". Then you can update cause of absence and/or call forwarding on your colleague.
- To return to "yourself", click again on the menu item Switch User and enter your own extension.



Warning at login and activity conflicts

At login or de-activating screen saver the user is informed about active absences and/or call forwardings.



If scheduled activities are conflicting or otherwise defective, the user will be alerted.

