estos ProCall One R2

5.1.150.1846

1   Welcome to estos ProCall One R2

The user help available leads you through the installation, configuration and handling of estos ProCall One R2.

- An overview of basic functions is shown on the page What estos ProCall One R2 offers to you.

- Information about how to integrate your contacts in estos ProCall One R2 Usage of existing contact data.

- Everything about the daily work with the programme can be found under Work with estos ProCall One R2.

- To be able to configure estos ProCall One R2 ideally, please look up estos ProCall One R2 customize.

- Links to software updates and support can be found on the page Product support.

Help can be accessed any time from the estos ProCall One R2 program window via **Help**. Help opens by default on the subject which corresponds to the function just used by you.

In Help the following icons are used:

Icon	Meaning
➡	Note
⚠	Warning, caution
⬆	Change from earlier versions

2   What estos ProCall One R2 is able to offer you

The estos ProCall One R2 provides a broad feature set for communication and collaboration with remote call control, conference, presence information, instant messaging and SMS text messaging.

The estos ProCall One R2 with its various configuration options adapts perfectly for your personal daily working needs. The estos ProCall One R2 integrates well with your favourite applications for e-mail and contact data administration and optimises seamless your workflow and communication processes for business purposes.

Learn more about the essential functions and performance features of estos ProCall One R2 here:

2.1   Contact search: Find information about the current contact.

estos ProCall One R2 automatically searches in case of an incoming or outgoing call for the appropriate contact information, based on the phone number (particularly the call partner) and displays this information. Which contact data sources are searched and in which order, can be defined in the configuration of the estos ProCall One R2 and (by the administrator) in the estos UCServer. If more contacts are found from several data sources for that phone number, the contact data which was last used is displayed as active.

Further you are able to search for the contact data of a person in the search window of estos ProCall One R2 by entering a name or parts of it. Then start the call or other activities from the contact detail window.

2.2   Journal - tracking and planning communication

The estos UCServer journal informs you about all communication events, e.g. completed phone calls, missed calls and unavailable call participants. The information can be filtered and arranged according to different criteria.

The journal entries can be edited, marked, provided with notes and shared with other users.

All details for future telephone calls can be collected and edited upfront.

This allows you to keep an overview of your entire communications at all times. Important information cannot get lost anymore.

2.3   Installation

The installation of the estos ProCall One R2 can be done in various ways.

- Requirements
- Manual installation at a workstation by the *.msi* file
- Installation using group policies in a network domain

2.3.1   Requirements

Requirements for the installation:

Operating system

- Windows® 8.1
- Windows® 10

2.3.2 Installation at the workplace

To start the installation at the workplace please double-click the *.msi* file. This starts the Windows® installer leading through the installation procedure. Several configuration options are offered to the user:

Version Information
The exact version number is displayed on the homepage.

License
The licence agreement has to be read and accepted by the user before the installation can be continued.

TAPI-driver
A TAPI-driver for your phone system is required to operate this software.
A TAPI-driver is a system component that is provided by the manufacturer of your telephony device (either free of charge or for a fee).
The TAPI-driver connects the CTI software to the telephony terminal device. Each TAPI-driver supports different functions depending on the implementation. Not all functions which you can perform on the phone itself are always available on the PC.

2.3.3 Installation using group policies

You can install workstations in the network automatically with the help of the group policy. Proceed as follows:

1. Define which components should be installed on the single workstations. Use the Windows® Installer in administrator mode for this. Start *msiexec/a client.msi*. You can now define a directory in which the prepared installation should be copied.
   This needs to be an accessible network share.
2. Start the Active Directory® user and computer management console in which you configure your domain users. Group your users (or computers) in such a way that you have organisational units. You can create group guidelines for each organisation-unit which controls the automatic installation of software.
   Open an organisatonal unit's properties.
   Go to Group policy. Add a new group policy.
   Open group guidelines with *Edit*.
   Add either under *computer configuration - software settings - software installation* or under *user configuration - software settings - software installation* a new package.
   Then select the installation package previously prepared via the administrative installation. Read the appropriate documentation on Windows Server®, Active Directory® and group policies.

2.4 Base configuration

The base configuration of the estos ProCall One R2 occurs directly after the installation of the software. The base configuration can also be started any time later via the Windows® start menu at the **estos ProCall One R2 Workstation Settings**. The following configuration options are available:

- Language selction of the estos ProCall One R2
- Licenses
- Lines options
- Groupware connection

Basic user settings are made from **estos ProCall One R2 Administrator**. In addition to the central configuration, various settings can also be modified directly from the workstation using estos ProCall One R2 Workstation Settings.

> ⚠️ Configuration of certain behaviors or properties will require administrative authorization for estos ProCall One R2. To do this, the user may need to be logged in as an administrator. A button enabling login as administrator will then appear on the corresponding settings page.

2.4.1 ProCall One R2 language

By default estos ProCall One R2 will use the current language set by the user for Windows®. If this language is not available the estos ProCall One R2 will use english as its language.

If you want to change the language of the client, you can do this with the estos ProCall One R2 workstation setup. Administrators can define the language with Active Directory® group policies. This prohibits changes by the user.

2.5 Licenses

estos ProCall One R2 requires licence keys to operate. Basic properties of estos ProCall One R2 are defined by the licence key.

Select license model
At this point there are the following possibilities:

Test 25 licenses free of charge (for 45 days)	An evaluation license is being used. estos ProCall One R2 may be tested using all available features for 45 days for up to 25 workstations. At the end of the test period, the licenses must be purchased and entered.
Add license	To enter a new license please use the button **"Add"**.

List of licenses used
This list shows the licenses entered and its properties.

Property	Description
Description	Description of licenses or its features
Valid until	Displays the license validity period
License	License key (35 digits)

Sum active licenses shows the summary of current valid licenses.

Add
Thereby, new licenses can be added to the list.
Any number of licenses can be entered.
The licenses have 35 digits and confirm to the following pattern:
XXXXXXXX-XXXXXXXX-XXXXXXXX-XXXXXXXX.

Remove
Remove the marked license from the list

Hardware-ID
A hardware ID which is used to create a license bound to the hardware.

2.6   Lines

Here you can select which extensions will be made available in the network.

A line usually corresponds to a phone. All lines available on the computer will be displayed in the list. **TAPI drivers** will provide the lines that should already have been installed on the system.

2.6.1   TAPI-driver

A TAPI-driver for your phone system is required to operate this software.

A TAPI-driver is a system component that is provided by the manufacturer of your telephony device (either free of charge or for a fee).

The TAPI-driver connects the CTI software to the telephony terminal device. Each TAPI-driver supports different functions depending on the implementation. Not all functions which you can perform on the phone itself are always available on the PC.

TAPI-drivers are installed in Settings - Control Panel - **Phone and Modem Options - Advanced**.

Open phone and modem settings:

2.6.2   Groupware connection

Here you can define which product integration is allowed.

- **Use estos ProCall One R2 with Outlook®**
  The client will connect to an Outlook/Exchange installation if this checkbox is checked
  MAPI and/or Exchange Web Services (EWS) can connect with Outlook® or Exchange.
  If Outlook® is used, check the **Use estos ProCall One R2 Plug-in with Microsoft Outlook®** checkbox
  to activate estos ProCall One R2 Plug-in for Outlook®. With this option enabled, an additional toolbar
  will be added to Outlook®, which provides access to some estos ProCall One R2 functions in a context
  sensitive manner. See Integrating Microsoft® Outlook/Exchange for more information.
- **Connect to Microsoft® Echange directly**
  estos ProCall One R2 can also connect to Exchange Servers directly by using Exchange Web Services.
  The necessary configuration can be read by estos ProCall One R2 from Outlook® directly. Mailboxes
  configured there will be used automatically.
  Additionally, mailboxes can be added manually by using the 'Configure' button, e.g. when no
  Outlook® is installed.

➡	Only Exchange mailboxes from Outlook® can be used automatically, but no POP3 or IMAP mailboxes.
⚠	Exchange Web Services requires .NET Framework v4.0 or newer.

- **Use estos ProCall One R2 with IBM Notes®**
  Setting this option permits the client to use the functions and databases of an installed and set-up IBM Notes® Client.
  Depending on the IBM Notes® installation, it may be necessary to manually set the path to the file *notes.ini*. Tick the box before the input line and give the complete path to the file.
- **Use Windows® 10 Apps integration**
  On a computer with Windows® 10, it is possible to integrate the included Mail, Calendar, and Contacts apps into estos ProCall One R2. This option will not be shown on older Windows® versions.

2.6.3   Exchange Web Services

Profile dialog
This dialog shows all configures mailboxes. Mailboxes can be added or removed here, and the default mailbox can be selected.
Mailboxes read from Outlook® will be shown greyed-out and cannot be removed.

- **Default mailbox**
  In this mailbox tasks will be saved (if wanted), and appointments used to create a presence state.
- **Use EWS only (deactivate MAPI)**
  Deactivates the MAPI-interface. Without this checkbox, MAPI and EWS will be used at the same time.
- **Monitor Outlook® inbox with EWS**
  With this setting estos ProCall One R2 watches the default mailbox and shows unread mails.

Add mailbox dialog
estos ProCall One R2 can log on to an Exchange-Server with your Windows® credentials or using usename and password.
The necessary Exchange Web Services URL can usually detected automatically, and you only have to enter your e-mail address.

- **Email Address**
  The e-mail address of the mailbox that should be added.
- **Server URL**
  The Exchange Web Services URL which should be used.
  This is usually similar to 'https://yourserver.domain/EWS/Exchange.amsx'
- **Detect server URL automatically**
  This URL can usually be detected by estos ProCall One R2 automatically.
  If this is not possible, you can disable the auto detection and enter the URL manually.
- **Use Windows® Login**
  If it is possible to authenticate against the Exchange Server by using your domain credentials, this option should be set.
  Otherwise, estos ProCall One R2 will ask for an username and password.

3   Usage of existing contact data

Contact data from other programs can be implemented or searched for. estos ProCall One R2 functions can be used from Microsoft Outlook® and Microsoft® Exchange. More information about supported contact data sources can be found on the following pages.

- Supported data sources
- Data from IBM Notes® (was: Lotus® Notes)
- Cooperation with Microsoft® Outlook/Exchange

3.1   Supported data sources

Contact data source integration is an integral part of estos ProCall One R2. Based on contact data, estos ProCall One R2 offers you an extensive catalogue of functions which ideally support you in your work.

In estos ProCall One R2 numerous contact data sources can be linked:

- **estos ProCall One R2 Favorites**
The data source Favorites gives you quick access to all the contacts you have stored in your favorites.

- **Outlook®**
With estos ProCall One R2, you can use all contact data stored in your Outlook® client. Thereby, you may choose to only use individual contact folders or all contact folders for an Outlook® inbox. You can also choose to include public contact folders, if your Exchange system provides them and you have access to them.

- **Exchange Web Services**
In addition to Outlook®, data can also be used directly from an Exchange server through its web service (as of Exchange Server 2007). Office 365 can also be integrated using this option, naturally.

- **IBM Notes®**
You can use all IBM Notes® (= formerly Lotus® Notes) address books in estos ProCall One R2. Both the local address book and address books on a Domino server can be directly connected and contacts stored in them can be used.

- **LDAP data sources**
With the option of connecting LDAP data sources estos ProCall One R2 makes a powerful interface available for accessing various contact data stocks provided they offer an LDAP interface themselves.

- **estos MetaDirectory**
The estos MetaDirectory can be integrated into estos ProCall One R2 as a special case of an LDAP data source. In this way you can integrate data sources such as IBM Notes® or common ODBC data sources into estos ProCall One R2. Further information can be found in the estos MetaDirectory help file.

- **Phone books**
estos ProCall One R2 permits the integration of phone books. At the moment, data from "Das Telefonbuch Deutschland", "Herold Austria" as well as "TwixTel Switzerland" can be directly accessed from estos ProCall One R2. You can also use KlickTel Server in connection with estos MetaDirectory.

Information about the integration, configuration and use of contact data sources can be found under data sources.

3.2   Data from IBM Notes®

IBM Notes® address books can be integrated into estos ProCall One R2 as contact data sources. Apart from local address books, address books on a IBM® Domino server can also be used.

The integration allows contacts to be edited and opened directly in IBM Notes® from within estos ProCall One R2. New contacts can equally be created in IBM Notes® via estos ProCall One R2. Please bear in mind, however, that the functions for editing and creating contacts are only available if IBM Notes® is running.

Dialing phone numbers from within IBM Notes® using estos ProCall One R2 can be realized with scripts.

➡   If a password is required for access to a IBM Notes® address book this must be entered when estos ProCall One R2 is started. Optionally, the password can also be saved in estos ProCall One R2.

Information about the integration, configuration and use of contact data sources can be found under data sources.

3.3   Cooperation with Microsoft® Outlook/Exchange

estos ProCall One R2 works closely with Microsoft Outlook®. This cooperation is based on two components:

- **Joint data usage**
  estos ProCall One R2 uses the MAPI interface for accessing information from Outlook® or providing new information to Outlook®.
  Alternatively, an Exchange Server can be integrated directly by using Exchange Web Services.
- **Outlook® user interface toolbar**
  In order to be able to use estos ProCall One R2 functions from Outlook®, a COM add-in can be installed upon request, which will add a toolbar to the Outlook® user interface for quick access.

3.3.1   Joint data usage

Contacts
Contact information from the Outlook/Exchange database can be sought and displayed by estos ProCall One R2.
Contacts from other data sources can be comfortably created in the Outlook/Exchange database via estos ProCall One R2 so that they are also available there.

E-mail
estos ProCall One R2 can store missed calls as email in the Outlook® inbox. Upon request, the client will also show the number of new emails in the inbox.

Calendar
estos ProCall One R2 can use Outlook/Exchange calendar information to determine the user's presence status. The user can define whether private appointments should be included and also prevent access to this information.

Tasks
The Outlook/Exchange task database can be used for comfortable call scheduling in estos ProCall One R2.

Journal
The Outlook/Exchange journal can be used to save a call journal created by estos ProCall One R2.
Copies of the estos UCServer journal entries are made for this purpose in this journal either by mouse click or automatically. It is also possible to define under which conditions such an entry should be copied.

Exchange Web Services
Should Exchange Server have been integrated directly through Exchange Web Services, estos ProCall One R2 will also be able to read the necessary configuration directly from Outlook®. All mailboxes setup there will be checked and used automatically.

3.3.2   estos ProCall One R2 Plug-in for Outlook®

To make context-sensitive access to estos ProCall One R2 features directly from Microsoft Outlook®, installation will add a plug-in-toolbar to Outlook®. Making calls, searching for contacts and creating tasks will be made possible by this plug-in.

Installation
The toolbar is set up as part of the estos ProCall One R2 installation.

Functions
The toolbar consists of three buttons and one input field:

Element	Description

Phone call	A menu with different functions is displayed by clicking on this icon. The functions are based on the displayed or selected elements.
	
	 • E-mail
	   Search for sender and sender e-mail address
	 • Contact
	   Menu for direct dialing of all the contact's phone numbers.
	 • Task
	   If the theme of the dialed or displayed task contains a phone number in square brackets ([]) a menu entry for directly dialing the number is created.
	 • Other element
	   All other elements have an entry in this menu to open the client focussing on the search line.
	
	 All elements always have the redialing list as last menu entry.

Search field	With the help of this entry field the estos ProCall One R2 can be promted to search for a term or dial the entered phone number. Enter appropriate text or phone number and confirm it with the enter key.
Plan call	A call can be schedule for contact using this feature. To do so, a new task will be created using a specially formulated subject.
Info	estos ProCall One R2 will display an informational window about this contact, which will list special information about the calls (done, scheduled and unanswered) in addition to contact data.

➡   The buttons *Plan call* and *Info* are only available if there is a contact selected.

4   Work with estos ProCall One R2

You can find out how to use estos ProCall One R2 for your tasks from here. Please choose a subject.

- Program start and overview
- Manage contacts
- Plan communication
- Communicate

4.1   Program start and overview

You can find out how to start or stop estos ProCall One R2 and become familiar with the programs' user interface from here. Please choose a subject.

- estos ProCall One R2 start and shut down
- Main window
- Menu bar icon
- Speech bubble info

4.1.1   estos ProCall One R2 start and shut down

Start
You may indicate if estos ProCall One R2 should be started when logging into Windows®. To do this, to Behavior, General on the estos ProCall One R2 settings dialog and set the Start ProCall One R2 when logging into Windows® setting.

estos ProCall One R2 can be started manually at any time by the Windows®-start menu.

Exit
estos ProCall One R2 will be closed by **Close** item on the main menu or the corresponding entry on the context menu for the tray icon.

4.1.2   Main window

The main window estos ProCall One R2 gives you access to the functions supporting your everyday work.

The significant sections of the main window will be described by the following material.
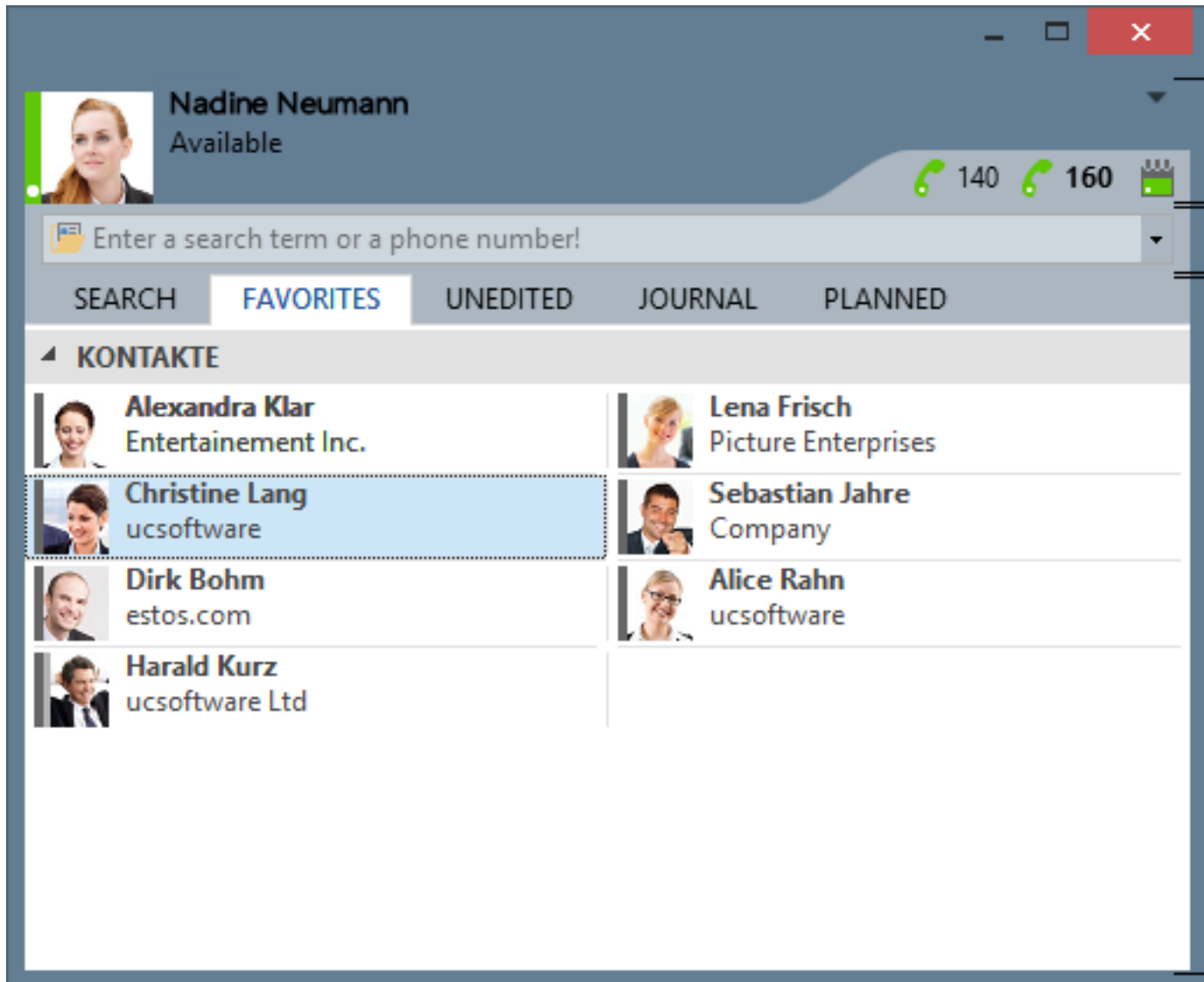
[1] My own presence
[2] Search input
[3] Tabs for Contact Search, Favorites, Journal , missed and planned calls

4.1.2.1 My presence

The **My Presence** section will display the most important information about the status of the phone as well as outstanding appointments. The Call Forward settings can also be configured from there and the calendar can be opened.

4.1.2.2 Main menu

The main menu can be opened with the main menu button ▼ which is situated in the top right corner.

It has features which will support you in your daily routine or with which you can adjust estos ProCall One R2 to your personal needs.

- **Journal browser**
  This menu item will open the Journal Browser. In contrast with the Journal Tab on the main window, you will be able to track all available journal entries.

- ✉ **Inbox**
  This entry opens Outlook® to show you your inbox.
- 🔧 **Settings**
  Click here to open the Settings. Here you can define or change the most important estos ProCall One R2 settings.
- ❓ **Help**
  Opens this online help
- ℹ️ **About ProCall One R2**
  Here you get information about the product version of estos ProCall One R2 and you have the possibility to get more detailed support informations and log files.
- ✕ **Exit**
  Exit estos ProCall One R2

4.1.2.3   *Search input line*

You can use the search input at any time to quickly find your contacts or to simply dial a number. You can immediately re-use the contacts found in the Search tab or save them in the Favourites tab for later use.

4.1.2.4   *Tabs*

The following tabs can be put in the foreground:

- Contact search
  Lists the hits for a contact search
- Favorites
  Space for your most important contacts and speed-dial keys
- Journal
  Collects the last calls made and received
- Unprocessed
  Saves the incoming calls and chats which you did not answer
- Planned
  Saves the planned calls

4.1.3   Menu bar icon

The symbol in the notification area always gives you a fast access to the estos ProCall One R2 main windows. Just left click on the symbol.

During a call, you can always move the Conversation Window into the foreground. If a conversation window is not open or all conversation windows have been displayed, the main window will be shown.

In contrast, if you right-click on the tray icon, you will have access to the following features from the context menu:

- 📞 **Journal browser**
  You can open the Journal browser with this menu item. Unlike the Journal tab in the main window you can consult all available journal entries here.
- ✉ **Inbox**
  The Inbox function switches to Outlook®. You can thus keep an overview of your e-mails received.
- 🔧 **Settings**
  Open the estos ProCall One R2 withSettings in which you can adapt estos ProCall One R2 to your requirements.
- **Base configuration**
  The Base Configuration dialog can be opened from there. Additional information can be found on the Base Configuration page.

- ⑦ **Help**
  Opens this online help
- ⓘ **About ProCall One R2**
  Here you get information about the product version of estos ProCall One R2 and you have the possibility to get more detailled support informations and log files.
- ✕ **Exit**
  Exit estos ProCall One R2

4.1.4   Speech bubble info

The info dialog is a small window at the edge of the screen, which will provide information about missed calls, new email messages and scheduled calls.

If you have missed a call or received a new email, for example, the info dialog will be always displayed. Thus, you will immediately be able to see all of the important information at a glance. You can also change to the relevant view immediately if you click on the desired field:

Field	Function
Missed calls	This opens the Unprocessed tab in the main window. You can therefore see your missed calls at a glance.
E-mails	Click the e-mail field to open Outlook's Inbox and view your new e-mails.
Planned	Click the field with the planned calls to display the main window with the Call planning. You will find all planned calls here.

You can also close the informational speech bubble window either by clicking on the Close icon at the top left of the window or by deactivating the corresponding option on the Behavior tab on the Settings dialog.

4.2   Manage contacts

Here you can find out how to find contact details for a person in your database and how to organize this data. Please, choose a subject:

- Search contacts
- Contact details
- Telephone number formats
- Favorites
- The Phone-Link

4.2.1   Search contacts
4.2.1.1   *Search with input line*

The connected data sources are browsed via the search input line. The contacts found will appear on the **Search** tab and can be immediately used for your work or, for example, dragged to the Favorites list for later use.
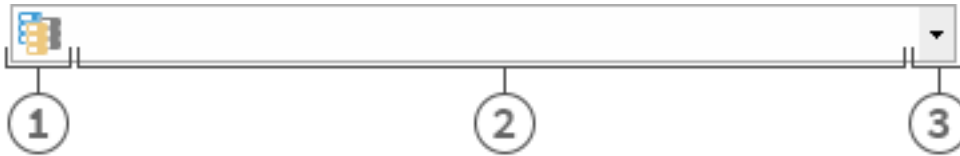
[1] Data source selection
[2] Search input
[3] Extended search / last search terms

You can use the search input with four different search variants:

- **Name search**
  The name search is the default search case. All contacts with the specified search term in the **last name**, **first name**, **company name** and **display name fields** (insofar as they exist) are sought. For some data sources, such as Outlook® or Exchange Web Services, additional entries for name searches can be indicated using the Datasources tab.

- **Phone number search**
  A phone number search instead of a name search is started as soon as you enter a search term in the search input field which estos ProCall One R2 can interpret as dialable . All contacts are found who have the searched phone number in a phone number field.

- **Search by e-mail address**
  A search across all e-mail fields is started if estos ProCall One R2 recognises the search term as an e-mail address. All contacts are found who have the specified e-mail address.

- **Detail search**
  With help of the detail search you can search for terms in dedicated fields. For example you can search for all contacts with name "estos" in the city "Starnberg".

  The detail search uses a syntax where all search terms are seperated by comma. The position of the term in the line of commas determines the field where this term is search for.

  Default order of the fields is *Name,First name,Company,Zip code,City,Street,Phone number*. The Fields can be configured in the settings at Search parameters.

  Detail search example

  - You are searching for contact "Anna Meier". Enter the last name in the first position and the first name in the second position. The searchentry is "Meier, Anna".
  - You are searching for contact "Anna Meier". The town and the postcode are in fourth position. The company name is left empty as this is not known. The search input therefore reads "Meier, Anna,Starnberg".
  - You can also use the postcode (Starnberg's postcode is "82319"). The search input then reads "Meier, Anna,, 82319" or "Meier, Anna,, 82319 Starnberg".
  - You are looking for contact "Meier" in "Munich Street". The street is in fifth position. The town is not known and is therefore left empty this time. The search input reads "Meier,,,,Munich". Please note that, as with all other search terms, the street name does not have to be written out in full.
  - You are looking for contact "Meier" with the phone number "08151123456" (Germany). The search input for this reads "Meier,,,,,08151123456".

- **Advanced search entry**
  The advanced search is started via the arrow symbol at the end of the search line. It is helpful for users who do not want to use the comma syntax while searching. When entering the search criteria the appropriate comma syntax is entered automatically in the search field.

4.2.1.2 Search tab

The search results are received on the **Search** tab if a new search has been started by entering the search criteria in the search field.

All available functions for the selected contact are displayed in the context menu. The contact menu appears if you click a contact with the right mouse button. Alternatively you can also press the context menu button or the Enter key on the contact.

Some functions which can be used on contacts will be highlighted as links on the shown contact. So if you want to call the contact, just move your mouse over the phone number and left click it. The following table lists all such availible functions.

Type	Description
Display name	Opens the Contact details for the contact. Alternatively, you can open the contact with a double click.
	Press the CTRL key at the same time (when possible) to open and edit the contact.
	If the current contact was automatically generated because a contact matching the search criteria was not found, that contact may be saved in Outlook® using this link, by double clicking in Outlook® or through Exchange Web Services.
Address field	Opens the Web browser and displays the address on the map.
	When pressing the CTRL key at the same time a route to the contact is found.
Phone number	Dials the number on the phone and sets up a call to the subscriber.
	If you press the CTRL key down while you click on the phone number, the phone call is prepared. Press the CTRL key at the same time as the Shift key, while you click on the phone number, and the phone call is planned.
Email Address	Opens the e-mail editor and enters the e-mail address as the recipient.
Presence identity (e.g. SIP-URI)	Start a new chat with the contact with presence identity.
Website	Opens the Web browser with the Internet address which was stored in the contact.
Data source (or data source icon)	Opens the contact folder storing the contact. Please note that this feature will only be available for Outlook® and Exchange contacts.

The presence symbol gives you the actual presence state of the found person. You can get all available presence informations about this contact in th etooltip by moving the mouse cursor over this presence symbol.

The search result list can be alternatively arranged with data source, display name, surname or company . The grouping lines can be shown or hidden. Settings can be changed in the context menu which can be accessed by a right click on the row header.

The contacts found can be sorted in ascending (A-Z) or descending (Z-A) order. Click to change the sequence on the column header where it is displayed.

The results list allows the selection of several contacts. Keep the CONTROL key pressed while selecting individual contacts with the mouse. These selected contacts can be dragged into the register card **Favorites** or functions may be carried out that are available for all contacts. That way, for example, you can write an e-mail to several recipients. So it is possible to write emails with more than one recipients for example.

The search result list also allows the selection and copying of single contact fields for the chosen contact. If it contains a action link, move the mouse cursor over the appropriate contact field or a little bit to the left or right beside it. As soon as the mouse cursor changes and indicates a text choice, you can select by holding down the mouse key and pulling the contact fields.

estos ProCall One R2 supports two different views in the results list

1. Only the details of the last selected contact will be displayed by default. All other contacts will only show with the most important entries, such as like Name, Company, and Data Source.
2. Alternatively, you can also display the contact details in the lower area of the search list. For this, pull the divider at the lower edge of the search list upwards with the mouse. You can remove the contact details area again by arranging the divider at the lower edge of the window. You can also move the divider with the CTRL+G key combination. Now use the arrow keys to change the new size of the detail area upwards or downwards. You confirm your input with the Enter key and cancel it with the ESC key.

> The indicated contact fields and the click actions on the contact fields can be individually adapted in the settings under Search result.

4.2.2   Contact details

The contact details window contains all available informations and functions for the contact in question. You may open it with the entry **Open contact details...** in the context menu of the contact or by double click on the contact.

All functions available for the contact are to be found in the icon bar at the upper edge of the window:

- **Make call**
  You can dial every phone number of a contact. The numbers are categorized with symbols:
    - **Business phone number**
    - **Mobile phone number**
    - **Services - software**
    - **Further phone numbers**
- **Plan call**
  Use this function if you want to call the contact later. Planned calls will be restored at estos ProCall One R2 after a restart of the client.
- **Prepare call**
  This function permits you to prepare a call. Prepared calls are created directly before a call and permit you to select special parameters such as project parameters etc. before the call is connected.
- **Edit contact**
  With this function you can open the contact in its original source. For example the contact will open in the contact editor of Outlook® if its data source is Outlook®. Please keep in mind that this function is

only available if the contact source is Outlook® or IBM Notes® and the according application is installed on the computer.
Exchange Web Services contacts may be edited using either the installed copy of Outlook® or the Outlook® Web app.

- **Create new contact**
Click here if you wish to use the existing contact as a template for a new contact. A typical application is a further contact person in the company.

- **Open calendar**
With the help of this function you can display the opened contact's calendar. Please note that this function is only available for estos ProCall One R2 users who are configured on your Exchange system and that the subscriber's calendar must be enabled.

- **Contact folder**
Select this entry to open the contact folder where the contact has been stored. Note that this feature will only be available if the contact originated from Outlook® or Exchange Web Services.

- **New Outlook® journal entry**
Click here to create a new journal entry in Outlook® or on Exchange Server for this contact. Note that estos ProCall One R2 no longer be able to open this contact afterwards.

- **E-mail**
If you have stored an e-mail address for the contact this function opens the e-mail editor with the recipient's address already filled in.

- **Website**
If you have specified a Web site for the contact this function opens the browser and loads the relevant Web site.

- **Clipboard**
This function copies all contact detail information to the clipboard. This information can thus also be used in other applications.

- **Map**
Call up this function to show the location of the contact on a map in the web browser. To this end, the map service stored in estos ProCall One R2 is used. Please note that a full address is required for this function in the contact.

- **Route**
Call this function to display a route to the contact's location in the Web browser. The map service set up in estos ProCall One R2 is used for this. Please note that you must have configured your own address in the Location settings. The contact must also have an address.

4.2.2.1 Overview tab

The tab **Overview** will show all informations about a contact which were stored. Here you can see all phone numbers, all addresses or the note for example.
Some entries are clickable like links. So you can just click on a phone number to call the contact for example, or send an email by clicking on the email address.
The tab **Overview** is generated using the template file *contact.xslt*, which can be adopted to your needs. For more information about adopting it see Dialog adaptation with Templates.

4.2.2.2 Journal tab

In the **Journal** tab all phone calls made with a contact can be found.
This inpersonated journal is mostly the same view as in the tab Journal in the main window.

4.2.2.3 Unprocessed tab

The **unprocessed** tab shows all entries marked as not dealt with or not read, which relate to the contact opened.
Please note that this inpersonated view is always grouped by days beacause grouping by contact does not make sense here. This is in contrast to the unprocessed tab in the main window.

4.2.2.4 *Planned tab*

The **Planned** tab contains all planned calls you have stored for the opened contact. This inpersonated view is the same as the Planned tab in the main window according to all other functions.

4.2.3 Telephone number formats
4.2.3.1 *Supercanonical number*

... makes it possible to distinctivly indentify a caller. estos UCServer and estos ProCall One R2 do exclusive use this format internally for all phone numbers. For display the numbers can view reformated in a beautified form. Phone actions will be performed with the shortened version.
Supercanonical phone numbers are starting always with a '+' character and have the following format:
+Country Area Number.
No whitespace characters are used. The number consists only of numerics and the '+' character.
Example: +4901234567

4.2.3.2 *Service numbers*

... are official phone number which cannot be given in an international format. For example the german emergency number (110) or the directory assistence (118xx). To dial such numbers with the PC, they have to be longer than the internal numbers or they have to be configured as a rule for external numbers. These numbers will be given directly as dialable without any whitespaces.
Example: 11833

4.2.3.3 *Phone number*

Phone number	Description
Dialable phone numbers	... will be stored in exactly the format wich is needed to dial it on the PBX. This numbers may be reformatted with the rules stored in the estos UCServer if needed. Examples: • **Phone number** internal extension number • **Phone number external dialing code** Number of subscriber 12345 in the local area network • **External dialing code Country Area code Phone number** Number of a subscriber in a different country
Phone numbers for display	... will be used by estos ProCall One R2, if this format can be generated with country codes and city codes available. **+Country (area code) number** Example: **+49 (30) 123456** Phone number of subscriber 123456 in Berlin, Germany

➡ The examples above are valid for germany and are strongly related to the according country. In the location settings you can see, which dial rules are valid for your location.

4.2.4   Favorites

In the estos ProCall One R2 frequently used contacts can be stored at the tab *Favorites*. They can be sorted in freely defined groups. For more information please refer to ActiveContacts.

Special Favorites tab functions
The *Favorites* tab has special features. For example, contacts in the search result list can be added to this tab using the **Add to Favorites** context menu item.

4.2.5   ActiveContacts

ActiveContacts offer buttons for call establishment, chat capabilities and they grant access to the context menu offering further functions.

The tooltip help of an ActiveContact contains all available information in text format.

A double click on an ActiveContact opens a window showing the related contact details. A right click on an ActiveContact opens the related context menu offering further functions.

Moving the mouse over the ActiveContact buttons displays a tooltip help. A left click on an ActiveContact displays the function buttons listed below:

Icon	Description
	Call a contact by phone, plan a phone call or prepare a phone call.
	Start a Chat with the contact.

The following icons may be displayed:

Icon	Description
	The small phone icon displays a user's line and its status. A phone is displayed for each of the user's visible lines (maximum two). If the line is diverted the phone is complemented with a small arrow.
	The small calendar icon displays the status of the user's calendar if there is an appointment now or in the future (within 24 hours).

4.2.6   The Phone-Link

With the installation of estos ProCall One R2 on your system the additional URL Handler "phone:" is registered, which allows you to put HTML document references to phone numbers or to the contact details window. A visitor of an Internet site can be given the possibility to initiate a telephone call to a certain participant by clicking on a link, to open the contact detail window or to establish certain contacts in the Favorites.

The use of the URL handler "phone:" for dialing is analogous to "mailto:" within the anchor tag in the HTML code. The number to be dialled or the EntryIDs of the contact to be opened follows as a parameter immediately behind.

4.2.6.1 Dial with URL Handler

The phone Handler can easily select a phone number by clicking on a link. For this the phone number to be selected is given to the phone Handler as the only parameter.

Example:
You wish to create a dialing link for subscriber "John Smith" with phone number "+498912345678". Insert the following lines into your HTML code:

```
<a href="phone:+498912345678">call Jon Doe</a>
```

The example looks like this:
Call John Smith

4.2.6.2 Open contact detail window with the URL Handler

The phone Handler can also be used for opening contacts. The Entry-IDs of the contact (separated by ":") must be given to the Phone Handler.

Example:
You would like to create a link displaying the contact details of the party "John Smith".

For example, the subscriber "John Smith" has the following entry IDs:
Data base ID: DB06 (ODBC data source)
Data memory ID: ODBC (in case of ODBC: name of ODBC data source)
ContactID: 1 (ID of contact in the ODBC data source)

Add the following lines in your HTML code:

```
<a href="phone:ID:DB06:ODBC:1">open John Smith</a>
```

The example looks like this:
Open John Smith

> ➡ If estos ProCall One R2 contains the setting that contacts are opened by default for editing, the contact in the editor of the data source (if possible) is opened instead of the contact detail window.

4.2.6.3 Add contact in the URL Handler Favorites

To add a contact from a data source, the keyword "addcontact:" must be given after the keyword "phone:". Afterwards, the Entry-IDs of the contact are displayed in the same way as in the contact detail window, each separated with ":". Optionally, the tab and the group name where the contact should be filed, can be given.

> ➡ Without specifying a tab and group name the contact is stored at the tab "Favorites".

> ➡ If only the tab name is given, the contact is put in the first group in the card index tab.

> ➡ If only the group name is given, all tabs are searched and the first group of the same name is used.

➡️   If no tab or group with the given name exists, these are automatically applied.

Example:
You want to include "John Smith" in Favorites. The participant "John Smith" has the same EntryIDs like in the example "open contact detail window".

Add the following lines in your HTML code:

```
<a href="phone:addcontact:DB06:ODBC:1" > include John Smith in Favorites</a>
```

The example looks like this:
Include John Smith in Favorites

4.3   Plan communication

Here you can find out how to plan and track your communication with estos ProCall One R2. Please choose a subject:

- Journal
- Journal browser
- Journal editor
- Unprocessed calls
- Call planning
- Reminder window

4.3.1   Journal

The **Journal** tab in the main window shows the last calls and chats. It contains the most important information in a view. The entries are always grouped by days.

The calls displayed use the same icons on the **Journal** tab as in the journal browser.

- Incoming external calls (connected)
- Incoming external calls (not connected)
- Outgoing external calls (connected) and calls (not connected)
- Incoming internal calls (connected)
- Incoming missed internal calls (not connected)
- Outgoing internal calls (connected) and calls (not connected)

The **Journal** tab can filter the shown entries with various options:

- **Today**
  Click here to display just the calls which were made or taken today.
- **Last week**
  Click here to display just the calls which were made or taken in the last seven days.
- **Last month**
  Click here to display just the calls which were made or taken in the last 31 days.

With estos ProCall One R2 it is possible to filter journal entries with a freely defined text. For example type '123' into the input field of the filter options to reduce the contents of the view to entries which are containing the text '123'. Please note that using the free text filter in this view only affects the currently loaded data and

hides unwanted rows for a quick access. For a complete full text search in the complete database please use the journal browser instead.

In the **Journal** tab you can configure the shown columns. You can reposition a column by left click and hold the left mouse button on the column header. Now move the mouse to the desired position. To remove a column, just move it outside the table. Right click on a column header opens a context menü. There you can change the visibility of columns and you can set the columns and their grouping options back to default. With this context menu you can open the field selection dialog. Here you can drag and drop column headers in to the table to add these columns to the view.

➡ Unlike the journal browser, the **Journal** tab does not have to be updated manually. New journal entries are entered automatically.

➡ Unedited calls and chats will be shown in bold.

➡ Calls which are answered by other users are shown in blue.

➡ Journal entries can be sorted by clicking on their column headers (reverse ordre it by click again). Please note, that journal entries are sorted within their grouping setting (per day).

➡ Please note that the journal in the main window is only a brief view of the journal entries. You will find a detailed journal with all columns and journal entries in the Journal browser.

4.3.2   Journal browser

The journal browser of estos ProCall One R2 offers a more detailed view on your calls and chats than the journal tab in the main window. Here you can get all calls of arbitrary time frames and you can group them with differently, not only ba days.

The calls displayed use the same symbols in the Journal browser as in the main window:

- 📞 Incoming external calls (connected)
- 📞 Incoming external calls (not connected)
- 📞 Outgoing external calls (connected) and calls (not connected)
- 📞 Incoming internal calls (connected)
- 📞 Incoming missed internal calls (not connected)
- 📞 Outgoing internal calls (connected) and calls (not connected)

The journal browser has a series of filters with whose help certain calls can be displayed or hidden depending on their type.

- ↩ **Default**
  Clicking on this button will reset all type-based filter settings to their default values. All calls that you have made will also be displayed again.
- 📞 **Incoming calls**
  Activate this option to display just incoming calls. Deactivate this option to display both incoming and outgoing calls.
- 📞 **Outgoing calls**
  Activate this option to display just outgoing calls. Deactivate this option to display both incoming and outgoing calls.

- **Internal calls**
  Activate this option to display just incoming calls. Deactivate this option to display both incoming and outgoing calls.
- **External calls**
  Activate this option to display just external calls. Deactivate this option to display both external and internal calls.
- **Calls (not connected)**
  Activate this option to display just calls which were not connected. This also contains all missed calls. Deactivate this option to display both calls which were connected and calls which were not connected.
- **Calls (connected)**
  Activate this option to display just connected calls. Deactivate this option to display both calls which were connected and calls which were not connected.
- **With note**
  Activate this option to display just calls for which call memos were saved. Deactivate this option to display both calls with and calls without call memos.
- **Without note**
  Activate this option to display just calls without call memos. Deactivate this option to display both calls with and calls without call memos.
- **Phone number hidden**
  Activate this option to also display phone conversations that block the partner's phone number. Deactivate this option to only display those conversations that provided the partner's phone number.
- **Public entries**
  Activate this option to also display calls by other estos ProCall One R2 users. Please note that private calls by other estos ProCall One R2 users are not displayed. Equally, the journal entries of other estos ProCall One R2 users cannot be changed as a rule. Deactivate this option to only display your own phone calls.
- **Filter journal type**
  Use this feature to filter journal types. By default, all journal types will be displayed. Journal type options include: TextChats only or phone calls only.

In addition, estos ProCall One R2 supports further functions for finding journal entries:

- **Date filter:** Select the desired start and end date in the date fields in order to display just journal entries from within a certain period. Alternatively you can also use the pre-defined keys **Today**, **Last week** or **Last month** to set the time period.
- **Text filter:** You can filter journal entries by a freely defined text. For example, type in the name of a sought after contact into the text field and press Enter. Alternativly you can start the search by pressing the **Start search** button.

The journal browser has the ability to group journal entries by certain criterias. You can change the grouping option in a drop down box in the area **View**.

- **Group by days**
  All journal entries from the same day are grouped together.
- **Group by contacts**
  All the same conversation partner's journal entries are grouped together.
- **Group by project**
  All journal entries assigned to the same project are bundled.
- **List view**
  The journal entries are displayed without grouping.

More journal entries
By default, a maximum of 100 hits will be returned from searches by estos ProCall One R2. All additional journal entries corresponding to the search criteria can be requested by clicking the **Additional Journal**

Entries button. That button is on the status bar. The button will be hidden when all log entries have been displayed.

The print function in the journal browser enables you to print either everything or only the selected journal entries as a list. It is printed the same as it is displayed on screen, i.e. with the current groupings and all visible columns.

You can freely change the columns to view in the journal browser. You can reposition a column by left click and hold the left mouse button on the column header. Now move the mouse to the desired position. To remove a column, just move it outside the table. Right click on a column header opens a context menü. There you can change the visibility of columns and you can set the columns and their grouping options back to default. With this context menu you can open the field selection dialog. Here you can drag and drop column headers in to the table to add these columns to the view.

➡ Unlike the **Journal** tab in the main window the journal browser must be updated manually, especially if new journal entries are added.

➡ Calls and chats marked as **Unprocessed** are highlighted in bold type.

➡ Calls which are answered by other users are shown in blue.

➡ The journal entries can also be sorted if you click the column headers (reverse sorting on second click). If a grouping has been set, the journal entries within each group are sorted according to the sort criterion.

➡ The grouping after projects is only available when the settings to Projects were configured that should use estos ProCall One R2 projects.

4.3.3 Journal editor

The journal editor in estos ProCall One R2 permits you to look up and subsequently edit information on a call made or received. It can be opened by double click on the journal entry of a journal list for example.

If a contact was linked to the opened journal entry, all functions for the contact can be run via the tool bar. For detailed descriptions of these functions, please refer to Contact details.

In addition, you will find special functions in the icon bar which you can execute for a journal entry:

- 🖫 **Save**
  Click here to save all changes to the journal entry.
- 🖫 **Save and close**
  The journal entry is saved and the editor window is subsequently closed with this function.
- 🖨 **Print**
  Click here to print out the journal entry.
- 🖷 **Print preview**
  Click here to show a print preview of the journal entry. You can also print the journal entry from the preview.
- 🖶 **Printer settings**
  Click here if you wish to change the printer settings for printing the journal entry.
- ✔ **Edited**
  If this button is activated the journal entry is marked as processed. Activate this button if you wish to mark the journal entry as processed.

- **Unprocessed**
If this button is activated the journal entry is marked as unprocessed. Activate this button if you wish to mark the journal entry as unedited. Unprocessed journal entries are displayed in bold type in the journal view.

The following data in the journal entry can be changed or added to with the journal editor:

- **Link contact**
When the contact selection button is clicked the contact selection dialog opens where you can link the selected contact to the journal entry by clicking **Ok**. Please note that this process transfers both the contact name and also the company name from the selected contact in the journal editor. If a contact is linked to a journal entry, all contact related functions can be executed from within the journal entry. So you can call the contact with a different phone number again or send him an email.
- **Change contact name**
You can enter any name in the contact name field which also appears in the journal views. Please note that the contact name can thus deviate from the name of the linked contact.
- **Change company name**
You can enter any name to be stored in the journal entry in the company name field. Please note that the company name entered may thus be different from the company name of the linked contact.
- **Change project PIN**
You can assign the call to a particular project here. You must first define the projects for this. You can create new projects in the settings under Projects.
- **Mark private call**
If this option is activated the call can be marked as a private call. This means that other estos ProCall One R2 users can no longer see this entry. Please note that depending on the server settings, all contact data including phone numbers can be shortened or deleted by this.
- **Edit call memo:**
Enter your call memo in the journal editor's memo field.

⚠ Please note that you cannot change the journal entries of other estos ProCall One R2 users.

⚠ Please note that the project PIN can only be changed if this feature has been activated in the settings on the Projects page.

⚠ It is only possible to mark private calls if this feature has been activated in the settings on the Projects page.

4.3.4 Unprocessed calls

You will find phone calls and chats which require your particular attention on the **Unprocessed** tab. Depending on your settings, you will see all journal entries here that are marked as not dealt with or all "Call in absence" e-mail marked "not read". Further information can be found under Settings in the Incoming calls.

You will find the following functions on the **Unprocessed** tab's icon bar:

- **Mark as edited**
The selected entry or entries are marked as processed or read. The entries thus disappear from the view.
- **Mark all as edited**
Marks all entries in the view as processed or read. The view is then empty.
- **Internal calls**
Activate this option to additionally display internal calls. Deactivate this option to display just external calls.

- **Grouped by days**
  Click here if the entries in the list are to be grouped by day.
- **Grouped by contacts**
  Click here if the same subscriber's entries in the list are to be grouped.

In this view of estos ProCall One R2 it is possible to filter the entries with a freely defined text. For example, if you type in '123' into the input field of the filter options, you will only see entries which contain '123' in one of their fields.

In the tab **Unprocessed** you can freely configure the displayed columns. You can reposition a column by left click and hold the left mouse button on the column header. Now move the mouse to the desired position. To remove a column, just move it outside the table. Right click on a column header opens a context menü. There you can change the visibility of columns and you can set the columns and their grouping options back to default. With this context menu you can open the field selection dialog. Here you can drag and drop column headers in to the table to add these columns to the view.

> An overview of the entry icons can be found on the Journal.

> The phone calls can also be sorted if you click on the column headings (reverse sorting on second click). If a grouping is defined the phone calls within each group are sorted by the search criterion.

4.3.5 Call planning
4.3.5.1 *Plan call*

With the help of the *call planning* window you are able to mark calls which you wish to make in the future. Already planned calls can be viewed in the tab **Planned** in the main window.

You will find all the functions which you can use for a planned call in the editor's icon bar

- **Make call**
  Click the upper half of the button to call the subscriber. The phone number which was specified in the phone number field in the editor dialog is always used.
  In the lower half of the push button, you are able to view the contact context menu with the arrow. Here, you will find every activity available for the linked contact. For a detailed description of these functions, please refer to contact details.
- **Save**
  Click here to save the planned call and all changes. The saved call appears on the tab **planned** in the main window.
- **Save and close**
  The planned call is saved with this function and the editor window is then closed.
- **Print**
  Click here to print out the planned call.
- **Print preview**
  Click here to display a print preview of the planned call. You can also print out the planned call from the preview.
- **Printer settings**
  Click here if you wish to change the printer settings for printing the planned call.
- **Delete planned call**
  Click here to delete the planned call. The editor window is then closed. Please note that this action cannot be undone.

Change the status of the planned call
In the section **Status** on the tool bar, the status of the planned call can be define with the aid of the drop-down box:

- **Set to in process.**
  Select this entry if you wish to show that you are currently processing the planned call.
- **Mark as completed**
  Select this entry if you wish to show that you have successfully processed the planned call.
- **Mark as not started**
  Select this entry to indicate that the planned call is pending.
- **Mark as waiting for someone else**
  Select this entry if you have to wait for someone before you can make this call.
- **Mark as deferred**
  Select this entry to mark the planned call as postponed.

The following data for the planned call can be defined or changed with the editor:

- **Change subject:**
  The topic field is generated automatically when creating a new planned call. You can customise this according to your requirements here.
- **Link contact**
  Clicking the contact selection button opens the contact selection dialog with which you can link the selected contact to the planned call by confirming with "OK". Please note that both the contact name and also the company name are transferred from the selected contact to the editor by this process.
- **Change contact name**
  You can enter any name in the contact name field which also appears in the journal views. Please note that the contact name can thus deviate from the name of the linked contact.
- **Change company name**
  You can enter any name which is to be saved in the journal entry in the company name field. Please note that the company name entered can thus deviate from the name of the linked contact.
- **Change phone number**
  The phone number which is dialed when the upper half of the Call button is clicked is shown here. If you have linked a contact to this planned call you can dial one of the contact's phone numbers in the dropdown list. You can nevertheless also enter any phone number in the field.
- **Define start date**
  Enter the start date in the relevant field. This defines when the planned call is to be made. Alternatively you can open a calendar via the dropdown arrow and simply select a day.
  Note: If neither a due date nor a reminder date have been activated, these will also be entered automatically when selecting the starting date.
- **Enter date due**
  Define here by when the planned call should have been made. You can either enter the date directly or use the calendar which you can open via the dropdown arrow.
  Note: if you have not yet defined a reminder date this is automaticallly set when the due date is selected.
- **Set reminder**
  Activate this option and enter the reminder date with a time to be reminded of the call. The Reminder window opens at the given time. Please note that the reminder function is only performed for planned calls which are marked as not processed.
- **Change project PIN**
  Here you can assign the planned call to a particular project. You must first define the projects for this. You can create new projects in the settings under Projects.
  Please note that the project PIN can only be changed if this feature has been activated in the settings on the Projects page.
- **Change memo**
  Here you can enter a memo text for the planned call which you wish to save.

4.3.5.2   Planned calls

The tab **Planned** gives an overview of all phone calls which are planned with estos ProCall One R2.

Display of planned calls
The planned calls have different icons depending on the processing status:

- **In progress**
  The planned call is presently being processed.
- **Completed**
  The planned call has been successfully processed.
- **Not started**
  Processing of the planned call has not yet begun.
- **Waiting**
  Waiting for someone else to process the plannned call.
- **Deferred**
  Processing of the planned call has been postponed.

In addition, the planned call is highlighted differently depending on its status:

- Planned calls which have not yet been processed are shown in bold text
- All planned calls due in the past which have not been completed are highlighted in red.
- Completed planned calls are crossed through and appear light grey.

The view on the "Planned" tab can be customised. Entries which fulfil certain criteria can be shown or blanked out.

- **Without date or reminder**
  Activate this option to also display all planned calls which have neither a date nor a reminder set.
- **Completed calls**
  Activate this option to additionally display all calls which have already been marked as completed.

The status of the planned calls can be changed via the icon bar or the context menu. Mark the relevant entries in the list and click the appropriate button.

- **Set to in process.**
  Select this entry if you wish to show that you are currently processing the planned call.
- **Mark as completed**
  Select this entry if you wish to show that you have successfully processed the planned call.
- **Mark as not started**
  Select this entry to indicate that the planned call is pending.
- **Mark as waiting for someone else**
  Select this entry if you have to wait for someone before you can make this call.
- **Mark as deferred**
  Select this entry to mark the planned call as postponed.

Further functions for processing planned calls are available in the icon bar:

- **Delete**
  Select this function to delete the selected entries. Please note that the deleted entries cannot be restored.
- **Update**
  Click this button to update the view.

In this view of estos ProCall One R2 it is possible to filter the entries with a freely defined text. For example, if you type in '123' into the input field of the filter options, you will only see entries which contain '123' in one of their fields.

In the **planned** tab columns can be freely configured. You can reposition a column by left click and hold the left mouse button on the column header. Now move the mouse to the desired position. To remove a column, just move it outside the table. Right click on a column header opens a context menü. There you can change the visibility of columns and you can set the columns and their grouping options back to default. With this context menu you can open the field selection dialog. Here you can drag and drop column headers in to the table to add these columns to the view.

➡ Either the estos ProCall One R2 editor or the Outlook® editor opens to edit the planned calls depending on your settings in the Planned section.

➡ The planned calls can also be sorted if you click on the column headers (reverse sorting on second click). Please note that the planned calls are sorted within their group, in other words per day.

4.3.6 Reminder window

The reminder window reminds you of calls which you have planned. It is always displayed when a reminder for a planned call is shown. The calls are displayed in a list.

Planned calls are highlighted differently in the overview. Details about this can be found in the help file for the call schedule.

You will find the following functions in the icon bar:

- **Make call**
  Click the upper half of the button to call the subscriber. The phone number which was specified in the phone number field of the planned call is always used.

  In the lower half of the push button, you can call up the contact context menu with the arrow. Here, you will find any operations available for the contact. For a detailed description of these functions, please refer to Contact detail window

- **Open planned call**
  Click this button to open the call schedule in the list. Alternatively you can also open a call with a double-click on the list entry.
- **Remind later**
  Use this function to be reminded of the planned call again later. Mark the relevant entries in the list and select the appropriate time period for this.

  You can also switch off the reminder for the planned calls. Select **Do not remind again** from the menu for this.

- **Delete planned call**
  Use this button to delete the selected planned calls form the list. Please note that this function cannot be undone.

➡ When you close the reminder window it is first displayed again when a reminder for the next call is due.

➡ A complete overview of all planned calls can be found in the main window in the "Planned" tab.

➡ The reminding time can be changed if you open the planned call in the editor. Further information under Planning calls.

4.4   Communicate

Here you can find out how estos ProCall One R2 can support you in your daily work. Please, choose a subject:

- Call window
- Line settings
- Call forwardings
- Remote Office
- SMS, E-Mail

4.4.1   Call window

The call window is the information and control centre for your phone calls. In addition to the visualisation of the call state, dialog partner and other relevant informations about the call, it is also possible to control the call. The window encapsulates logically connected phone calls in a single user interface and thus permits the convenient control of one or more calls on one phone. With the option of making assignments to projects, marking private calls and writing memos, this window is one of estos ProCall One R2's central components.

4.4.1.1   Call window overview:
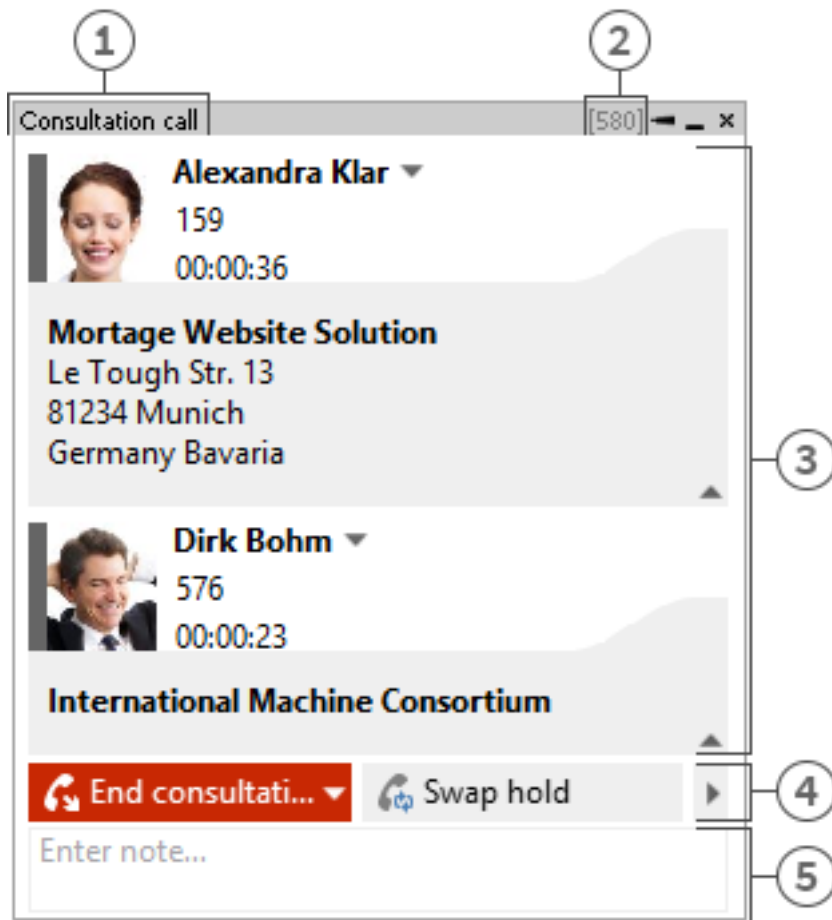
[1] Call state
[2] Active line
[3] List of calls
[4] Control
[5] Call Memo / Project settings

The call window, as shown above, is divided vertically into three areas.

- A list of calls
  The call window can manage and control one or more calls or even a conference call. All calls which belong together are displayed in a call window.

- Phone control The call control area enables you to control the active call.

- Memo area with project, private labelling, phone number display suppression
  The memo area extends the phone information and control with a collection of information about the call. The memo entered is written into the journal of all call participants when the window is closed. If finished calls are removed from the call window, the given note is stored at that time. To be able to set projects and mark private calls adds to the information pool. For more information about the project settings and private settings see Projects.

  In this area you still have the option of suppressing the display of your phone number by switching on the phone number display suppression. The remote station called then does not see who is calling. (Does not work with every phone system and not with internal calls).

Icon	Meaning
₁₂₃	Phone number suppression deactivated
₁₂₃	Phone number suppression activated

4.4.1.2 *Overview of the individual call in the call window:*
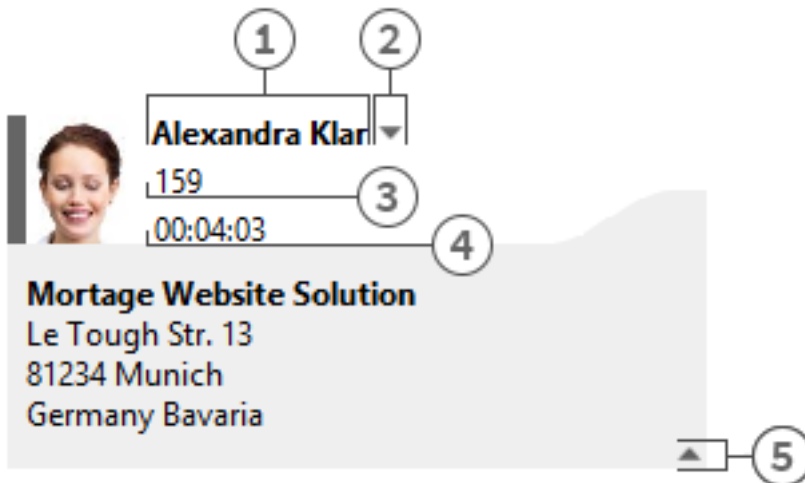
[1] Call partner
[2] Contact chooser
[3] Phone number
[4] Call duration
[5] Hide contact details

- Status icon
  The status icon shows the current state of the call. A list of status icons used can be found here. Apart from the visualisation, you can open the journal created for he current call participant via the icon. If the window contains several calls you can select a call by means of the icon and call this contact again. A tooltip on the icon displays a brief summary of the most important call information.

- Call partner
  estos UCServer and estos ProCall One R2 search automatically for a contact for the phone number during a call. The contact found is displayed here if available. If no contact could be found you can create a new contact here.
  You can read about which data sources can be searched in which order during a contact search in Contact search. If several contacts are found a button appears next to the contact to enable selection of a contact.

- Contact selection If several contacts are found for the current phone number, you can select a particular dialog partner by means of the contact selection. estos ProCall One R2 stores this selection and will show you this contact as your dialog partner the next time he calls again. Further information about searching for contacts in estos UCServer and ProCall One R2 can be found under contact search.

- Number The number is displayed next to the status icon. The tooltip always contains the call status and number.
  You can change the dialog partner's number for a prepared or ended call here. A new contact search is automatically triggered if you change the number.

- Call duration Displays how long you have been connected with the dialog partner.

- Show contact details One of the strengths of estos ProCall One R2 is the option of extending the call window with dynamic HTML content. You can show and hide the display of additional information with this button. A series of templates are available for displaying further information which you can adapt to your needs.
  The template defines which contact details are to be shown. You will find the templates in the installation directory in *Templates/default/*:
  - *RemoteContact.xslt*
    Is used in the call window for preprocess details for the current dialog partner. The template defines which contact details are displayed.
  - *HoldContact.xslt*
    Is used in the call window to preprocess the details for a dialog partner on hold. The partner on hold is displayed if a further estos ProCall One R2 user holds a subscriber while calling you. The template defines which contact details are displayed.
  - *LocalContact.xslt* Is used in the call window to preprocess details for the contact called. In case of an incoming call the contact called is displayed if a contact's number is found. For this you must activate the hotline services in the settings for incoming calls. The template defines which contact details are displayed.
  - *RedirectedContact.xslt* Is used in the call window to preprocess the contact details for a forwarded call. The contact for whom the call was last signalled is displayed. The template defines which contact details are displayed.

The contact data and call data provided in XML are implemented by the software in the template. If the template data contains data to be displayed, it is shown in the call window (if applicable).
In order to make customisation of the call window templates as simple as possible, you can display the XML contact and call data provided and also the result of the XSLT parser. Copy the appropriate template out of the default directory into the template folder, open it and change the value of variable *debug* in the body tag to 1:

```
<body minwidth="0" minheight="0" maxwidth="0" maxheight="0" debug="1">
```

After you have reloaded the contents of the call window by pressing F5, the displayed templates appear with a colored background. A context menu permits you to view the source code. The upper part of the text file contains the parsed template; the lower part contains the raw XML data which was handed to the parser. Further information on developing your own XSLT templates can be found here.

4.4.1.3   Conference
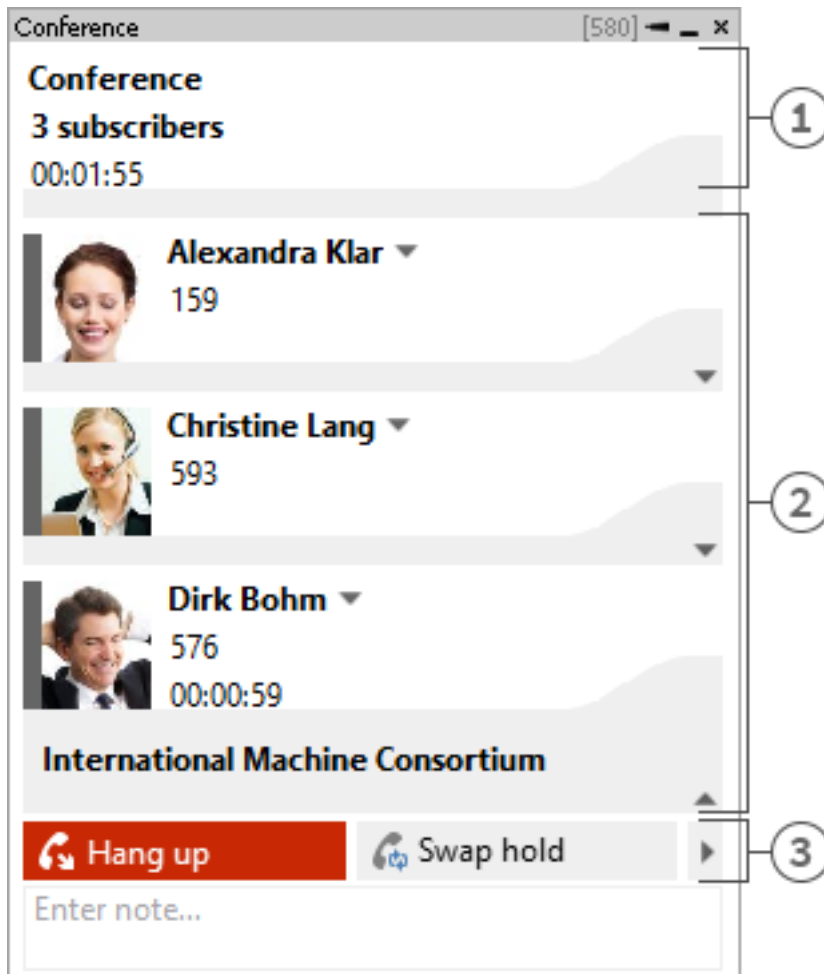
[1] Conference controller
[2] Conference participant
[3] Controls for the conference

The call window is displayed in the format shown above as soon as you initiate a conference. You can no longer directly control the individual calls but only the conference which is displayed as the uppermost entry in the call list. How long the conference has been running is shown next to the number of conference participants. The further elements of of the call window are similar to those described above.

4.4.1.4   The various status icons:

The states of phone calls are visualised by means of various status icons. The icon provides direct access to the journal for the current dialog partner. The tooltip contains information on the state of the current call. If there are several calls in the call window you will always see which is the current live call by the symbolised text in the speech bubble.

Icon	Meaning
	Incoming call. Flashes when the phone rings.
	Outgoing call. Flashes when the phone being called rings.

	Held call
	Prepared call
	Active auto-dialing
	Callback after the Callback when engaged or when not reached function has been activated
	Ended call. If there are several calls in the call window this is the unselected, ended call. When all calls in the call window have ended, you can select this call by clicking it. The selected call is started with the **call** button.
	If there are several calls in the call window, the text in the speech bubble shows you that this is the active call. This call is displayed with the controls in the lower part of the call window.

4.4.1.5   The various control options:

Depending on the telephony status you can perform various control actions on the current call. The visibility of the individual buttons is significantly influenced by the function range of the phone system.

Icon	Meaning
	Set up dialing for the phone number currently stored in the call window:
	The currently selected contact in the call window offers several numbers. Via the icon **select** you can choose another of the contact's phone numbers. The call is not yet initiated. The icon **call** starts the call.
	Accept an incoming call. The phone switches to hands-free mode. Analogue phones do not support this feature.
	End current call. Reject incoming ringing call. End consultation call End conference. End auto-dial.
	The current phone status either permits ending various calls or you can connect subscribers to each other by hanging up. The combo menu displays which actions are supported. The **hang-up** key ends the current call.
	Hold current caller. The subscriber is either put on hold or a callback is initiated depending on the phone system.
	Retrieve subscriber on hold

	Begin callback. A window opens for searching for contacts or entering numbers. The window contains the last targets for callbacks and forwardings.
	Call on hold. Current call participant is on hold and call participant which was on hold gets connected.
	Initiate conference. Initiate a conference with the current dialog partner and the dialog partner on hold.
	Add dialog partner to the conference being held.
	Forward call. A window opens for searching for contacts or entering numbers. The window contains the last targets for callbacks and forwardings.
	Forward call. You have access to your contact's further phone numbers via the check box. Thus, you can quickly forward a call on your cordless or mobile phone. **The Forward** button opens the contact dialog as described under *Forwarding*.
	If the number called is engaged you can start automatic redialing via this icon. An attempt is made to call the subscriber again after a certain period of time. At what intervals and how often this redialing should take place can be defined in the settings Outgoing calls define.
	Activates the Callback when no answer or engaged function. A callback to this subscriber is started as soon as the remote station is available again.
	Planning a new call to the current contact's last connected number. If the select button is visible, you can choose one of the contact's other phone numbers for the planned call.
	The current call will be restored to the planned status e.g. for setting other project settings. If the select button appears, you can choose other phone numbers of the contact for planing the call.
	Opens a dialog for subsequent selection of DTMF tones. Input can be made with both the keyboard and the mouse.

If various buttons are not visible either the current phone status or the phone system driver do not permit this action.

4.4.2 Line settings
4.4.2.1 *Entries in the line menu:*

- **Set as default line**
  If a user has more than one line, he can define via the menu which one is to be the standard line. All telephone operations not requiring specification of the user's own line relate to this line. The line is shown in bold typre.
- **Telephony control**
  If a line is busy with a call, you can only have a controlling influence on the call on this line. No other operations are offered.

- **Set call diversion...**
  Permits direct set-up of call diversion without having to configure a Call diversion profile. The last call diversion is saved and automatically recorded in the last dialog.
- **Cancel call diversion**
  Shows all items of call diversion set up on this line. If the call diversion set up can be attributed to a Call diversion profile, the name of the profile is displayed.
- **Set call forwarding**
  Shows all configured Call diversion profiles currently set up on the line.
- **Switch protection against incoming calls on/off**
  Permits activating or deactivating protection against incoming calls on the line.
- **Remote Office**
  Redirects the extension to a phone outside of the company. Outgoing calls will display the company's number. Further details can be found under Remote Office.
- **Activate/deactivate suppression of phone numbers**
  This allows you to activate or deactivate caller ID suppression for outgoing calls on the line. You will see in the menu whether caller ID is displayed or suppressed. You must activate the caller ID suppression feature in the Settings.
- **Extended settings**
    o **Configure call forwardings...**
      Allows configuration of Call diversion profiles.
    o **Rename line...**
      Here, you can change the name for the line. That way, it is easier to distinguish between different terminals using the same phone number.

4.4.3 Call forwardings

Call diversions can be set in several contexts in estos ProCall One R2.
Call diversion profiles have been integrated to support the User in being able to reuse several different often-used call diversions and at the same time to be able to divert several lines.

If a call diversion is to be set on one of your own lines this can be done via the lines button in the "My presence" area.
This opens a dialog which lists the currently available call diversions and allows them to be reset or edited.

A call diversion profile consists of a name, the line which is to be diverted (or the lines which are to be diverted), the type of diversion and the target phone number.

New
With **New** a new call diversion profile can be established. This opens a dialog. In this dialog, the user defines the name of the profile and selects the line to be forwarded. He can also select **All** if he has several lines and wishes to forward calls from all of them.

Edit
The currently selected diversion profile can be edited with this icon.

Delete
Deletes the selected profile.

4.4.4 Remote Office

The Remote Office feature makes working while on the road or at home possible. With this function, your phone number can be redirected to any phone desired (the Remote Office Phone).

This feature can be turned on and off from Line Settings. If the feature is not visible there, the telephone system does not support it.

If the feature 'Remote Office' is turned on, the behavior will change as follows:

- Calls to your phone will be forwarded to the Remote Office phone.
- If the PC is used to select phone number, the Remote Office Phone will ring first. If the call is answered, you will be connected with the selected phone number.

4.4.5   SMS, E-Mail
4.4.5.1   Start chat

There are various ways of initiating a chat.

- **SMS text to a single user:**
  Everywhere you see a contact in estos ProCall One R2 you can send him a SMS text via the context menu or via the ActiveContacts. For this purpose the context menu offers all phone numbers which are to be found in the mobile phone number fields for the contact.

4.4.5.2   Moderators:

The initiator of a Chat is automatically the moderator. They have extended rights and can add and remove participants as well as appoint further moderators or remove moderator status.

- **Add party**
  After clicking the button to add users the search dialog opens in which you can see all internal users. Select one or more users and confirm the dialog to add the participants.
  Chat parties can be added per drag & drop to the Chat window (sending SMS messages for mobile contacts only, a estos UCServer Chat for internal users only).
  The maximum number of participants is limited to 30.
- **Remove participant**
  To remove a subscriber from the chat open the subscriber's context menu and select the relevant entry.
- **Appoint subscriber as moderator:**
  To appoint a subscriber as moderator, open the subscriber's context menu and select the relevant entry.
- **Remove subscriber's moderator status:**
  To remove a subscriber's moderator status, open the subscriber's context menu and select the relevant entry.

4.4.5.3   Links:

estos ProCall One R2 supports the following links in the chat window:

- **Phone numbers:**
  Phone numbers are highlighted as such and can be selected by clicking them as long as they comply with the rules for the currently selected line's location. (phone:+4912345612, +49 123 456 - 12, 12 etc.)
- **E-mail links:**
  E-mails are recognised and the default mail program is started by clicking it. (mailto:info@info.de, info@info.de etc.)
- **Web links:**
  Recognises all Internet links such as. (http:, https:, www:, www2:, file:, ftp:, gopher:, ntp:, prospero:, telnet:, news:, wais:)
- **UNC paths:**
  Recognises UNC paths. (\\server\directory\file)

➡️ If links contain whitespaces estos ProCall One R2 cannot find the beginning and the end of the link itself. If you place these links between < and > brackets the link is correctly recognised. <u><Link with space(s)></u>

➡️

5   Customise estos ProCall One R2

estos ProCall One R2 functions can be customised to your needs in many places. The first is the **settings** dialog, which you can acces via the main menu.

The dialog is divided into the following catagories:

- Appearance and behavior
- Telephony
- Search
- Integration
- Services

5.1   Appearance and behavior

In this category you can customize the view of the client, control the behavior in certain events, assign hotkeys and shortcuts, add locations and use advanced service functions.

- View
- Characteristics
- Actions
- Action filter
- Action fields
- User-defined actions
- Hotkeys
- Shortcuts
- Location
- Advanced
- Customize dialogs with templates
- Control functions via Windows® Registry

5.1.1   Characteristics
5.1.1.1   *General*

Display estos ProCall One R2 with Windows® log-on
Use this option if estos ProCall One R2 is to be started automatically when the system re-boots. The client is always started minimised in this case.

Show start process
Check this checkbox if you want more detailed information to be shown on the screen when estos ProCall One R2 starts.

5.1.1.2   *Show speech bubble for*

If at least one of this settings are active a speech bubble will show you the according information near the windows taskbar.

- **Missed calls**
  Display of all unanswered calls
- **Unread E-Mails**
  Display of new e-mails in the in-box
- **Chats**
  Display of unanswered chats

- **Planned calls**
  Display of planned calls due
- **Challenge-Response**
  Display of open Challenge-Responses
- **Unread Fax-Messages**
  Display of new Fax messages in the Inbox

5.1.1.3 *Advanced*

- **Open Contacts by default for editing**
  Contacts are normally opened for display in estos ProCall One R2. Alternatively, you can set-up the contacts to be always open for editing. By keeping the CONTROL key pressed down, you can switch to the operation not selected by default when clicking on a contact.
- **Commit contact detail tabs last selected to memory**
  With this function, you will open the contact detail window always with in the same tab. If you close the contact detail window in the tab "Unprocessed", the page "Unprocessed" will automatically appear when you next open a contact.
- **Register as standard-telephony application**
  Here you can control whether estos ProCall One R2 should automatically register itself automatically at start as a standard-telephony application. The standard-telephony application takes on telephone dialing requests on the TAPI level and diverts this to the telephone or telephone system.
- **Play notification sounds**
  Notification sounds of estos ProCall One R2 will be configured through the audio scheme of Microsoft® Windows®. You can switch off notification sounds altogether here and open the relevant Windows® settings page.

5.1.2 Actions

Automate estos ProCall One R2:
estos ProCall One R2 enables you to execute numerous of actions if defined events occur (ringing phone for example). The following tabel givs you a brief overview:

Event	Description
In case of an incoming call	Occurs when your phone rings.
In case of an outgoing call	Occurs, when you have established a call and the phone rings with your respondent.
At the end of a call	Occurs when the call (not connected) or the conversation (connected) was ended.
When call is answered	Occurs when you accept an incoming call or your dialog partner accepts an your call.
When the remote call party changes	Occurs when the dialog partner changes during the call.
In case of an appointment (busy)	Occurs when an appointment in Outlook® which is marked with the "busy" attribute becomes due.

In case of appointment (out of office)	Occurs when an appointment in Outlook® which is marked with the "absent" attribute becomes due.
Automatically opened contact detail window	Occurs when a contact details window open by estos ProCall One R2 automatically.
After xx minutes idling	Occurs, when you have pressed no key or moved your mouse in xx minutes.

5.1.2.1   Create new action:

1. Click **Add new action** and select the event when the action is to be executed in future.
2. Click **Choose action** and select the action which is to be executed by the selected event.
3. Make sure that the checkbox to the left of the selected event is active (checked). The action will only then be executed. You can also uncheck the checkbox if the action should not to be performed at present but will be needed later.

5.1.2.2   Activate/deactivate action

You can create an action for later use or temporarily deactivate an already created action if you deselect the hook on the left, beside the event field. As soon as the hook is input again, the event happens.

5.1.2.3   Remove actions

Actions which are no longer required can be removed with the "Delete" button at any time. The action to be removed must first be marked. Alternatively you can select the **Remove action** entry in the event field.

5.1.2.4   Use Actions filter

estos ProCall One R2 allows you to limit certain events by the aid of action filters, or to describe something more specifically. To put in an Action filter or to change, click on the filter button in the suitable row.

- Up until now no Action filter was defined or the Action filters were deactivated. Click on this button to apply an Action filter or to activate the Action filter.
- An action filter was defined and activated. Click on this button to change the Action filter or to deactivate the Action filter.

You can find further information in the section Action filter.

5.1.2.5   User-defined actions

estos ProCall One R2 gives you the option to create actions by yourself. These can be additionally selected when an event in the action list occurs. To create a new action, click the "Actions" button. More information about this is available in the section user defined actions.

➡	The events "at appointment (engaged)" and "at appointment (absent)" work only if data should be transferred, what can be changed by the settings under calendar.
➡	A call diversion which is preset "at appointment (busy)" or "at appointment (absent)" as an action in

the events, is also set as not activated in estos ProCall One R2.

➡ A call diversion which is preset "at appointment (busy)" or "at appointment (absent)" as an action in the events, is reset at the end of the appointment again.

⚠ If no actions have been defined to an event this entry is deleted when the settings dialog is closed.

5.1.3   Action filter

Action filters are rules which describe events more exactly and which allow you to therefore explain actions only in certain cases. The action is executed only if *all* given rules apply.

Set the check mark to **use filter** in order to create a filter. Remove the check if you want to disable an already defined filter, however it is not deleted immediately.

Click on the button **Add...** and choose the field name whose field value should fulfil a condition. Here you are offered every action fields.

After you have chosen the field name, enter the rule in the column **Regular expression** which the field value must fulfil.

5.1.3.1   Regular expressions

A brief overview of the permitted expressions:

Character	Description
^	The beginning of the string. With the Caret at the beginning of the regular expression, it is determined that the field value must agree from the outset. The expression "^0 " means that the field value must begin with "0 ".
^	The caret (^) directly after the left bracket ([) has another meaning. It is used to exclude the other signs within the bracket. The expression "[^0-4] " permits only figures except 0 to 4.
$	The dollar character ($) calls the end of the string. The expression "152$ " is valid only for strings which end with "152".
|	The sign (|) permits both characters between it. The expression "8|9 " permits "8 " or "9 ".
.	The point (.) permits every character (or every figure).
*	The Star (*) indicates, that the character to the left must exist O times or more.
+	The Plus (*) is similar to the Star, only that the character to the left must exist at least 1 time.
?	The question mark (?) indicates, that the character to the left must exist O or 1 time.

[]	The corner brackets ([and]) indicate the amount of characters that are permitted at this point.
\	The Backslash is used as an Escape sequence. If you want to search for "+", you must write "\+".

➡ Tip: The Caret sign (^) can be found on the top left of a German keyboard.

5.1.3.2 Check filter

You can check your input immediately here. Enter a value as an example in the field of the same name. The example value is applied to all regular expressions. The symbols beside the field name indicate whether the example value on the regular expression fits.

- The blue symbol indicates that either no example value was entered, or that the entered example value does not fit on the regular expression.
- The green symbol indicates that the entered example value on the regular expression fits.
- The red symbol indicates that the regular expression is not valid. In this case correct the regular expression.

5.1.3.3 Examples

Effect	Actions field	Regular expression
Complete only with internal calls	<Call.Internal>	1
Complete only with external calls	<Call.Internal>	0
Complete only with calls from Germany	<Call.NumberSC>	^\+49
Complete only with calls from Germany or Switzerland	<Call.NumberSC>	^\+49|^\+41
Complete with calls, in which no contact was found	<Call.ContactEntryID>	^$
Execute only with contacts of the company "estos GmbH "	<Contact.Company>	^estos GmbH$
Complete only with high priority appointments	<Appointment.Importance>	2
Run only for appointments that start at 9 clock (german date format)	<Appointment.StartTime>	09:00
Run only if appointments start at 9 o'clock (American date format)	<Appointment.StartTime>	9:00:00 AM

➡ Please note that in certain events not all fields can be used. Thus no appointment fields are available, e.g. for telephony events. An entire overview of all fields, as well as which fields are available with

which events, can be found in the section action fields.

➡ Action fields that represent a timestamp, such as <Appointment.StartTime> use the date format configured for the local computer. This corresponds to the display of dates, as estos ProCall One R2 displays them in the log view in the Date column. For example, "Mo 02.07.2012 15:10:25" (Germany) or "Mon 7/2/2012 3:10:25 PM" (USA). The Date column can be added to the column headers on the **Journal** tab page by right-clicking the column header with the mouse.

5.1.4   Action fields

While editing User-defined actions in estos ProCall One R2 you can use placeholders which were replaced when the action is executed with actual data (e.g. the phone number of the participant in the discussion will be filled in). These placeholders can also be used for action filters.

The Action fields can be divided into three different groups:

- Telephony-Action fields
- Contact-Action fields
- Appointment-Action fields

5.1.4.1   *Telephony-Action fields*

Field name	Description
<Call.NumberSC>	The phone number in supercanonical format (e.g. +49301234567)
<Call.ContactEntryID>	The database or Outlook® EntryID of the contact, if one was found.
<Call.ContactEntryIDStore>	The database or Outlook® EntryID of the Messagestore in which the contact was found
<Call.ContactEntryIDDB>	The database identifier of the database in which the contact was found.
<Call.ContactName>	The display name of the contact, if a contact was found for the phone call.
<Call.Origin>	The direction of the phone call: 1 for "outgoing", all other values mean "incoming".
<Call.Internal>	Indicates whether the call is internal or external: "1" for internal, "0" for external.
<Call.Private>	Indicates whether the call is marked as private: "1" with private calls.
<Call.ProjectName>	The project name, if the telephone call is assigned to a project.
<Call.ProjectPIN>	The project PIN, if the telephone call is assigned to a project.

<Call.Note>	Contains the call memo.
<Call.MSN>	Own extension number.
<Call.MSNSC>	Own extension number in canonical format.
<Call.MSNName>	Name found for the own extension number.
<Call.RedirectingSC>	The forwarding phone number in canonical format.
<Call.RedirectingName>	The name of the contact who forwarded the call.
<Call.HoldNumberSC>	The number of the contact that is being on hold.
<Call.CreatedTime>	The time at which the call has been created on the ProCall One R2.
<Call.ConnectedTime>	The time at which the call was accepted.
<Call.DisconnectedTime>	The time at which the call has been terminated.

5.1.4.2   Contact-Action fields

Field name	Description
<Contact.DatabaseName>	Readable name of the database which the contact comes from.
<Contact.EntryID>	The database or Outlook® EntryID of contact.
<Contact.EntryIDStore>	The database or Outlook® EntryID of the messagestore, in which the contact was stored
<Contact.EntryIDDB>	The Database identifier of the database, in which the contact is stored
<Contact.CtiServerUserName>	The CTI username if it is a CTI user
<Contact.DisplayName>	The contact's display name.
<Contact.FirstName>	The contact's first name.
<Contact.LastName>	The contact's last name.
<Contact.JobTitle>	The contact's job title.

<Contact.Company>	The contact's company name.
<Contact.Department>	The contact's department.
<Contact.OfficeRoomNumber>	The contact's office number.
<Contact.CustomerID>	The contact's customer number.
<Contact.BusinessAddressStreet>	The street of the contact's company address.
<Contact.BusinessAddressPostalCode>	The Post code (zip code) of the contact's company address.
<Contact.BusinessAddressCity>	The town/city of the contact's company address.
<Contact.BusinessAddressState>	The province/state of the contact's company address.
<Contact.BusinessAddressCountry>	The country of the contact's company address.
<Contact.PrivateAddressStreet>	The street of the contact's private address.
<Contact.PrivateAddressPostalCode>	The Post code (zip code) of the contact's private address.
<Contact.PrivateAddressCity>	The town/city of the contact's private address.
<Contact.PrivateAddressState>	The province/state of the contact's private address.
<Contact.PrivateAddressCountry>	The country of the contact's private address.
<Contact.OtherAddressStreet>	The street of the additional contact's address.
<Contact.OtherAddressPostalCode>	The post code (zip code) of the additional contact's address.
<Contact.OtherAddressCity>	The town/city of the additional contact's address.
<Contact.OtherAddressState>	The province/state of the additional contact's address.
<Contact.OtherAddressCountry>	The country of the additional contact's address.
<Contact.EMail>	The contact's first e-mail address.
<Contact.EMail2>	The contact's second e-mail address.
<Contact.EMail3>	The contact's third e-mail address.

<Contact.SIPAddress>	The contact's SIP-Address (or instant messaging address).
<Contact.WebPageURL>	The contact's Web-Address.
<Contact.PhoneBusiness>	The contact's first business phone number.
<Contact.PhoneBusiness2>	The contact's second business phone number.
<Contact.CompanyMainTelephoneNumber>	The contact's company phone number.
<Contact.AssistantTelephoneNumber>	The contact's assistance phone number.l
<Contact.PhoneHome>	The contact's first private phone number.
<Contact.PhoneHome2>	The contact's second private phone number.
<Contact.PrimaryTelephoneNumber>	The contact's primary phone number.
<Contact.PhoneMobile>	The contact's mobile/cell phone number.
<Contact.CarTelephoneNumber>	The contact's car telephone number.
<Contact.RadioTelephoneNumber>	The contact's radio phone number.
<Contact.PagerTelephoneNumber>	The contact's pager phone number.
<Contact.OtherTelephoneNumber>	The contact's additional phone numbers.
<Contact.CallbackTelephoneNumber>	The contact's callback phone number.
<Contact.ISDNTelephoneNumber>	The contact's ISDN phone number.
<Contact.TTYTTDTelephoneNumber>	The contact's hearing impaired phone number.
<Contact.FaxBusiness>	The contact's business Fax number.
<Contact.FaxHome>	The contact's private Fax number.
<Contact.Body>	The contact's memo text
<Contact.IsPrivateContact>	Indicates whether it is an private or business contact.
<Contact.IsCtiServerUser>	Indicates whether it is a CTI-user.
<Contact.DirectWebLink>	The contact's Web application link for web-based CRM

	systems.
<Contact.Custom0> - <Contact.Custom19>	Contents of the custom contact fields "Custom0" to "Custom19".

5.1.4.3   Appointment-Action fields

Field name	Description
<Appointment.EntryID>	The database or Outlook® EntryID of the appointment.
<Appointment.OwnerName>	The owner of the appointment.
<Appointment.DataSource>	The database identifier of the database, in which the appointment is stored.
<Appointment.StartTime>	The date and time the appointment starts.
<Appointment.EndTime>	The date and time the appointment ends.
<Appointment.Duration>	The duration of the appointment.
<Appointment.Subject>	The subject of the appointment.
<Appointment.Body>	The memo text of the appointment.
<Appointment.AllDay>	Indicates whether it is an all-day appointment.
<Appointment.Status>	Indicates the status of the appointment.
<Appointment.Category>	The category of the appointment.
<Appointment.Importance>	The level of importance of the appointment.
<Appointment.Sensitivity>	The level of confidentiality of the appointment.

5.1.4.4   Event dependend

Depending on the event, for which a User defined action or a Actionsfilter is created, different Action fields can be used:

Event	Available Action fields
On incoming call On outgoing call	Telephony-Action fields

At the end of a call When call is answered When the remote call party changes	Contact-Action fields
In case of an appointment (busy) In case of appointment (out of office)	Appointment-Action fields
Automatically opened contact detail window	Contact-Action fields
After xx minutes idling When computer is locked	-

5.1.5   User-defined actions

User-defined actions serve to implement programmes with certain phone call actions. Some information can be transferred at the start of the programme as a command line. In most cases it will concern applications developed yourself which carry out additional functions, e.g. when a phone call is signalled.

All configured actions are displayed in the list. You can add new actions and edit or delete existing ones.

Action name
Allocate a name here, which is indicated. This name is for your information only and is recorded on the list of available actions on the settings page Behavior.

Application
Give the path for the application which you want to complete here. You can also specify the document to be opened. In addition, specific field names which are replaced at Program start with the corresponding values of the phone call, contact or appointment, can be entered here. You can find an overview in the section action fields.

Command line
Give here which command line of the program should be transferred. As with the application line, the given fields which are replaced by Program start with the corresponding values of the phone call, contact or appointment, can be used here. You can find an overview in the section action fields.

Directory
The list in use should be begun.

Mode
Here you can state how the program should start (maximised, minimised, normal or hidden). Not every program evaluates this parameter!

Example:
It should be a user-defined action which opens the homepage of the caller automatically.

1. Give the action a descriptive name, e.g. "web page open".
2. Enter in the application line, the entire path to your Internet browser, e.g."C:\programFiles (x86)\Mozilla Firefox\firefox.exe".
3. As a parameter, the browser expects the URL of the Internet site to be opened. The URL is restored by estos ProCall One R2 in the contact-action field "WebPageURL ". Enter in the command line of the field names "< Contact. WebPageURL>" or click on "field add" and select the entry of the same name from the list.
4. You do not have to state the compete list. Simply leave the line "list" free.

5. Because the browser with the homepage should be indicated, set the mode to "Normal start".

5.1.6 Hotkeys

The term hotkey describes the option of defining system-wide key combinations which permit phone numbers to be dialed or calls to be ended (hang up) out of almost all programs. You define the key combination in this settings dialog.

Dial selected phone number, otherwise start Contact Search.
To dial a number with the shortcut key, the number has to be selected with mouse in the according window, then press the shortcut key. If there is no phone number selected, estos ProCall One R2 tries to search for a contact instead.

ⓘ	You can use the hotkey in Outlook® itself. You can thus dial any phone number in a contact by marking the phone number. Use the hotkey also to transfer a contact to the phone status window. You can also start callback from the journal with the hotkey.
⚠	Dialing from a console application (DOS window): If the phone number cannot be selected directly by the mouse, then first activate the DOS Console's Editing Mode using [ALT]+[Spacebar].

Use this hotkey also for accepting a call
If this option is selected, incoming calls can be answered with the same hotkey as is used for dialing (if your phone supports this feature).

Shortcut key for hanging up
Here you can define the hotkey for ending the active connection. Type in the key combination (special keys such as Alt, CTRL and Shift are also possible). You delete the hotkey with the Del key.

Display main window
This Hotkey brings the main window of estos ProCall One R2 on screen and you can immediatly start searching contacts.

ⓘ	These hotkeys are configured system wide, so no other application can use the same key combinations for other actions.
⚠	Dialing with the hotkey uses the Windows® clipboard and the keyboard shortcut [CTRL+C]. The contents of the clipboard can be changed at the same time and the shortcut [CTRL+C] not used as a hotkey. Consider these restrictions with the use of this function.
⚠	Phone numbers or contacts cannot be dialed (or searched) from applications that have been started with higher administration rights than estos ProCall One R2. If the hotkey has been pressed in such an application, an information dialog will provide a reminder. estos ProCall One R2 can only display this reminder if the hotkey is used in combination with or (a Windows® restriction).
ⓘ	If phone numbers cannot be dialed, advanced users can attempt to give the other applications more time so that this data can be provided. See Function control via Windows® Registry for more information.

5.1.7 Shortcuts

To increase productivity, certain application features can be assigned to key shortcuts. Thereby, certain tasks and features can be started, opened or executed using a simple shortcut.

The list contains all available features, sorted by units, that can be assigned to shortcuts.

Assign a shortcut to a feature:
Click on the second column so that a text entry cursor will appear. Then simply press the desired key combination.

Delete a shortcut:
The Delete button can be used for this purpose. If you are currently in the process of assigning a new key, simply press [Del].

Reset all shortcuts to their default values:
The two buttons "Reset" and "Reset All" are available for this purpose.

> The shortcuts for features that have been grayed out cannot be modified. This can be because of the following reasons:
>
> 1. The shortcuts may have been assigned by the manufacturer.
> 2. The shortcut has been assigned by the System Administrator using group policies.

> If a conflict is discovered between the choosen hotkey and a hotkey from another application, an alternative hotkey should be choosen, or remove the other hotkey from the other application first.

5.1.8 Location

The location settings contain all the necessary information to permit correct dialing and correct display of phone numbers. These settings are especially important if you are using a phone system or if your phone is attached to a phone system, otherwise external numbers could not be dialed and the dispalying a phone number would not function correctly.

The country, dialing code and phone or phone system settings are configured exclusively in estos UCServer and cannot therefore be changed in the client. If you have assigned several lines, the location settings always refer to the selected default line.

You can configure in which format the phone numbers should be shown in estos ProCall One R2. Internal phone numbers will always be shown in short notation.

Address
You should enter your location's address here. This information is necessary and is used exclusively for the map function and route planning.

Map/route planning
Select a service from the list which you wish to use for the map function and route planning. You can choose the language in which the route information is displayed.

> If no country name was indicated in a Contact, the country name of your default location will be

	assumed.
⚠	To plan a route to a contact it is important that a complete address is available for the contact.
⚠	The name of the country in a Contact must be spelled in full. A "D" or "de" for Germany is not enough. The name of the country may be given in several languages such as, among others, German, English, French or Japanese.

5.2   Location

The location settings are used to enable the right dailing and display of phone numbers.

Only with the right location settings it is possible that external phone numbers are dialed and displayed properly.

This section of the help file will describe the individual configuration parameters on the Location Settings dialog. If a location is depicted, the following pages will provide all information necessary for configuration. If several networked locations must be setup, all information for special configuration scenarios can be found in the Location Designs section.

Country/region:
Choose your country from this list.

Area code
Enter your local area dialing code here. This is for example 030 for Berlin or 44 for Zurich (Switzerland).
The leading 0 is not necessary and is removed by the system when the settings are saved.

Display Advanced Settings
The location settings have many options that will only be needed in special cases. Settings that are not mandatory for normal operation will not be displayed by the wizard.

The advanced settings include:

- Rules for the detection of internal and external phone numbers
- Rules for formatting the line phone numbers
- Special formatting of phone numbers that will be registered by the telephone system
- Special formatting of phone numbers that will be transferred to the telephone system for dialing
- Least cost routing
- Vanity phone numbers

5.2.1.1   *Formatting*

These rules apply to phone numbers reported by the TAPI driver of the phone system.

You can enter several extension numbers, separated by commas, in all fields. Normally the extension numbers are identical (default value: 0).

Remove access codes for outside lines for phone numbers

- **reported as incoming:**
  Enter the extension numbers to be deleted from the phone number in case of incoming calls.

- **reported as outgoing:**
  Enter the extension numbers to be deleted from the phone number in case of outgoing calls.
- **reported as a forwarded call:**
  Enter the extension numbers which must be removed from the phone number in case of forwarded calls.

Remove codes for outside lines for the ConnectedID

- **reported as incoming**
  Enter the extension numbers which should be removed from the number for incoming connected calls.
- **reported as outgoing**
  Enter the extension numbers which should be removed from the number for outgoing connected calls.
- **Ignore ConnectedID**
  If the driver for the telephone system reports inconsistent number formats for ConnectedID (different forms of numbers to get an outside line for incoming, outgoing or connected calls), you must ignore the ConnectedID. As a result, you will not see the actual number of the person at the other end, but only the number of the person called or calling.
  This option is the last chance to catch inconsistent numbers from the driver. Please try first to make the reported numbers consistent by configuring the driver or the telephone system. **Only activate this feature when it is absolutely necessary**.

5.2.1.2 *Dialing prefixes*

Outgoing PC dialing:
An external access prefix (also referred as external dialing code) is the number on the telephone that must be used to make an external call. The entry of this number will be required for dialing from ProCall even for automatic external access on the telephone. Normally, the following external dialing codes are identical (default value: 0).

- **Local access code:**
  Enter the access code you need for calls to destinations in your own area.
- **National access code:**
  Enter the access code you need for calls to national destinations.
- **International access code:**
  Enter the access code you need for calls to international destinations.
- **Private call external dialing code:**
  Enter the access code required for placing external phone calls. The placeholders: e, E, u or U (see Projects); may also be used.
- **Number for an outside line required to activate call forwarding:**
  Here, enter the number for an outside line which you require for call forwarding.

5.2.2 Advanced

Core services

Phone number format, PC dialing
This option determines the phone number format for outgoing calls. Phone numbers are transfered in this format to the phone system.

- Apply dialing rules (standard)
  Phone numbers are always formatted according to the dialing rules.
- Always international super-canonical/E164
  Phone numbers are always converted into the super-canonical phone number format (e.g. +1891234567, also known as international E.164 format) before they are sent to the phone system.

Only activate this option, if your phone system and the TAPI driver supports this phone number format.

Always enter the area code for local phone numbers.
If the area code must be dialed for calls in the local area, this option must be enabled. In some cases, IP Centrix providers require the call to be dialed with the corresponding area code.

Automatically re-dialing extensions
If a number to be dialed is longer than the maximum phone number length allowed in the corresponding target country, the number will be divided into sections and the first section dialed and then the remaining section dialed as a DTMF number after the connection has been made. This currently applies for countries like the United States, Russia and Taiwan. The maximum phone number length is defined in the countries.xml and cities.xml files. If the option has been deactivated, the telephone system will have to emulate this behavior.

Abbreviate Phone Numbers before Dialing
Long phone numbers from other locations will be abbreviated to the DDI phone numbers before dialing. The rules to be determined for this will be displayed under PC Dialing. If dialing between locations requires cross-network identifiers, the rules will have to be configured manually from PC Dialing.

5.2.3 PBX system

Location is using a PBX
Activate this option, if the location has a telephone system.

Public line type
Please select the type of the public line: DDI trunk line (for Direct Dial-In) or a Multipoint connection line. Sometimes DDI lines are also referred to as DID lines (for Direct Inward Dialing). A DDI line enables external parties to call internal phones directly using phone number ranges. DDI numbers comprise of a PBX base number (addressing the PBX) plus a number range (or several ranges) to address internal phones from outside. A Multipoint connection typically is used for smaller offices or for home usage. One or more phone numbers (Multi Subscriber Number = MSN) are used in this case. The MSNs may be totally different, e.g. they don't have to use numbering ranges.

PBX base number (only with a PBX using a DDI line)
If you have a DDI line you should enter the PBX base number here. For example if you have the number +1 (30) 12345-222, the PBX base number is 12345.

Extension Numbers (DDI - Direct Dialing In) (only with a PBX using a DDI line)
If all extension numbers have the same length configure an extension number space. If extensions are used with different lengths configure extension number prefix.

Extension number space
Please enter here the extension number range (DDI range or space) that is allocated by the phone company for the related PBX. For example, if you have the DDI number range from +1 30 12345 30 to +1 30 12345 69, enter "from 30 to 69". Or for example using three-digit extensions while the entire range is available for DDI enter "from 100 to 999".
All internal phone numbers available in this range are displayed automatically as external, international phone numbers.

Extension number prefix
Please specify the lowest and the highest first digit of the extension numbers. If e.g. the internal numbers 20, 300-499 and 5000 are used please configure '2' as the first prefix and '5' as the second prefix. The length of the internal numbers are set to '2' to '4' in this case. Depending on the length of the internal numbers the program calculates the numbers to be used as external and international types.

Length of internal phone numbers:
Enter the length of longest and shortest internal phone numbers. If all extensions are the same length, for example 121 (three digits), both entries should be "3".

Extension phone number format:
External phone numbers: displays the international phone number for the location (only for a system connection).
Internal phone numbers: displays the internal phone numbers for the location

5.2.4 Least cost routing

Least cost routing is the automatic selection of the cheapest call-by-call provider for a call. You must configure rules in order to make this choice for a call. For the ProCall One R2 LCR to be able to offer LCR, there have to be rules setup. These kann be setup manually oder implemented from different web services.

Information about current rates of Call-by-Call providers can be found on the internet under www.estos.de/produkte/unified-communications/procall4plusenterprise/lcr.html.

- **Provider**
  The Provider list will contain all stored Call-by-Call providers with their respective dialing codes.
- **Zones**
  The Zones list will contain the zones for the Least Cost Routing feature.
- **Assignment of zones to providers**
  Through the Allocation of providers, the system will know when to use which provider. In addition to differentiation based on the day (Monday-Friday, Saturday & Sunday), the providers may be allocated to the configured zones based on time

Reset
Deletes all LCR settings.

Import and export
You can import and export all LCR settings. The following formats are supported:

- Own LCR-data format (*.lcrxml)
- Agfeo LCR-data format (*.lcr)
  For Germany you can obtain LCR-data in this format from several providers in the Internet.

5.2.4.1 Least cost routing assignment

Every zone can be assigned to a provider. This assignment is separate for Monday to Friday, Saturday and Sunday. Different providers can be used at different times for each of these days.

The time (in 48 half-hours) is plotted to the right of the table. The configured zones are listed at the bottom. Each line of the table shows which provider is used for the zone at the respective time.

Select the provider which you wish to assign. Next, click on the cells date and time in the table where the provider is to be used.

5.2.4.2 Provider

A provider is a provider of call-by-call telecommunications services. In order to use a provider for a phone call the provider's network dialing code is dialed before the phone number.

Examples for Germany

Provider	Pre-selection network prefix
Arcor	01070
Tele2	01013

5.2.4.3 Zones

A zone represents a list of phone numbers which can be called for a certain tariff. You can assign a provider to every zone accoring to date and time.

Zone name
Enter a name for for the zone, e.g. longis distance or mobile.

Area code list
All phone numbers which start with digits provided in the list belong to this zone. The phone numbers will be compared when processing the Dialing Rules. Entries must be made in international format (such as: +49171).

Examples

Area code	Meaning
+1	All numbers which begin with +49, in other words all phone numbers in Germany (apart from special numbers).
+1905	All phone numbers which begin with +1905, in other words all numbers in Toronto, Canada.
+117	All phone numbers which begin with +4917, in other words all mobile phone numbers in Germany with a 017x dialing code.

Instructions
You typically configure zones for local calls, long-distance calls and mobile phone networks and several zones for other countries.

Priority of longer dialing codes
If there are several dialing codes configured in different zones which fit the phone number, the zone which has the greater number of digits in its dialing code is used.
Example: the number +4917123456789 is dialed. If +4917 is entered in zone 1 and +49171 in zone 2, zone 2 is used because more digits match.

Priority of zones without providers
If there are several dialing codes configured in different zones which are identical and one zone has no provider assigned to it the zone without a provider has priority.

5.2.4.4 Line phone numbers

The rules permit detection of phone numbers based on Regular Expressions or direct comparison. Each entry can be configured individually. If the Replace With column has been entered, the phone number will be replaced automatically. The phone number should be formatted using international notation after the

formatting process. The configured rules will be processed from top to bottom until the first match has been found.

Check:
The rules can be checked immediately. Enter the corresponding expression in the Phone Number field. If the phone number was detected and how it has been implemented can be seen in the output row. The rule used for recognizing and formatting will be highlighted.

➡ Specific Examples for the Use of Rules for Adjusting Line Phone Numbers:

- Phone Numbers with Cross-network Identifiers (Cisco)
- Internal and external phone numbers outside of the base number range (lines do not carry the DDI phone numbers, but rather internal line identifiers).

➡ If a comprehensive set of rules should be established, the list can be maintained outside the administrator's utility. Existing rules can be exported as XML or CSV files, adjusted correspondingly and then re-imported.

5.2.5 Projects

estos UCServer permits the user to assign calls to previously defined projects, to send certain code numbers to the phone or the phone system when dialing or to mark calls explicitly as private.

Parameters are, for example, used with targeted MSN assignment, the initiation of private calls in phone systems or for dialing project parameters. You can define several parameters here and give them names. They can then be used in the call window. The parameters are always saved in the journal on the estos UCServer.

Parameters have two functions:

- Parameters for dialing. These are sent to the phone system and activate specific features before making the call.
- Parameters for the Journal. These are included in the journal (server-side) and are subsequently used for invoicing by project parameters.

Define projects:

1. Enter a readable name for the project in field **name**. This name appears later in the call window and the journal.
2. Enter the **parameter** which is dialed before the actual number in the column of the same name.

   The following rules apply:

Character	Deployment
0-9 * #	Digits which are dialed normally
C	Here you wait for the remote station to accept the call.
e, E	Place-holder for entering a PIN. With E, the number of digits for entry is not important. With e,

	the number of digits is defined by the number of letters (eee for three digits).
u, U	Place-holder for entering a user ID. With U, the number of digits to be entered is not important. With u, the number of digits is defined by the number of letters (uuu for three figures).
p, P	Dialing pause: p for 0.5 seconds, P for 1 second
N	Place-holder for the number to be dialed. If the place-holder is not specified the number is automatically added to the end.
J	Defines, if available, that the user login and pin number entered by the user is noted in the journal.
X	Defines, if present, that the number to be dialed should be dialed with an external code. If the 'X' is missing the number is dialed in national format (03012345678).

3. Select one of the following **options** which is to apply for the project:
   Journal entry only: The parameter is not sent to the phone but just saved in the journal.
   Dialing and journal entry: This parameter is used for outgoing dialing is saved in the journal entry.
   Dial only: This parameter is only used for dialing.
   Dial Private Call: The Access Code for Private Calls option is used for this (see Dialing Prefixes). Doing so may be necessary in order place private calls, depending on the telephone system and configuration. Phone numbers used for private calls will not be visible to others and will be additionally flagged in the journal.

Examples of use:

- For the journal only:
  You wish to assign project parameters to calls. Create an entry and name it e.g. Project Test and give the parameter 12345. Select the Journal entry only option. The parameters are logged on the server side only.
- Selective external dialing code:
  Assume you have have a normal external dialing code of 'o' and a further external dialing code which is '80'. Create an entry and name it 'External2'. Enter '80' as the phone number. Select the 'Dial only' option.
- Select project parameter:
  Assume you can dial the project parameter '4444' on the phone with the combination *604444#. Create an entry and name it 'Current Project'. Enter *604444# as the phone number. The X means that an external dialing code must be added after the project parameter. You can then also make internal calls with this project parameter.
- Private call 1. Example:
  Assuming you can dial a private call on the phone with your personal PIN '1234' by means of the combination *601234#: create an entry and name it 'Private'. Specify the number as *60eeee#X. The 'X' means that an external code must follow the parameter. You can then also make internal calls with this parameter. The 'eeee's mean that you still have to enter a four-digit PIN. If you then dial in the call window with this setting you are asked to enter this PIN. You can, of course, enter the PIN for private calls here directly, in other words *601234# (if no other person has access to your computer).
- Private call 2. Example:
  Assuming you can dial a private call on the phone with your personal PIN ‚1234' by means of the combination 51234: after entering the PIN you no longer have to dial an external code. Create the entry and name it 'Private'. Enter 5eeee as the phone number. This time, no X is used (no external code after the parameter). The 'eeee's mean that you still have to enter a four-digit PIN. If you then

dial in the call window with this setting you will be required to enter the PIN. You can, of course, also enter the PIN for the private call directly here: 51234.

- Example of a calling card provider:
  With the rules you can deal with dialing a calling card provider for private conversations. Enter the phone number format required by the calling card provider in the project parameters field.
  E.g.: 0080012345678CP#eeeeeeeee#uuuu#N#
  The calling card provider is dialed via the number 0080012345678. After the call has been answered there is a one-second delay; the 8-digit user ID and then the four-digit password is subsequently transmitted, followed by the number to be dialed. The placeholders for 'e' and 'u' were queried by the user in the client. User recognition and the PIN can be saved on the client if desired.
  The subsequent dialing of digits after a pause or waiting for an answer from the remote station is realised with DTMF tones. This is only possible if your TAPI driver supports this feature.

5.2.6 Check rules

Here you can check the configured rules. Enter a phone number and check if the phone number is used correctly for displaying or dialing.

Format for dialing
Formats a phone number that will be transferred to the telephone system for dialing. The formatting process will perform the following steps:

Formatting for call forwarding
Formats a phone number that will be transferred to the telephone system for call forwarding. The formatting process will perform the following steps:

Format for display
Formats a phone number for display.

ConnectedID outgoing
Formats the outgoing ConnectedID reported by the driver. The formatting process will perform the following steps:

ConnectedID incoming
Formats the incoming ConnectedID reported by the driver. The formatting will perform the following steps.

CallerID
Formats the CallerID reported by the driver. The formatting process will perform the following steps.

CalledID
Formats the CalledID reported by the driver. The formatting process will perform the following steps.

Call forwarding
Formats the phone number for call forwarding reported by the driver. The formatting process will perform the following steps.

5.2.7 Area code rules

These settings are only required for countries in North America.

The area code rules determine which dialing rules must be used for dialing a number in the North American Numbering Plan (NANP). The number must be dialed differently depending on how far the number you wish to dial is from your own location. For example, a free call must be dialed differently to a chargeable call.

The target number to be dialed decides which dialing rules are used. The number's area code and the three digits which follow it are decisive.

Own area code
Calls within the local area can be free and chargeable. Configure which dialing rules must be used.

- All calls in the local area are free.
  Phone numbers with the same area code as your own location are always dialed with the *local call* dialing rule.
- There are calls within the local area which are chargeable.
  If there are chargeable phone numbers with your own area code, select the dialing rule *local call (chargeable)*.
    o Configure chargeable phone numbers
      Configure the Prefix rule for which phone numbers wit the dialing rule *Local call (costs involved)* have to be selected. All other phone numbers in the local area are dialed with the dialing rule *Local call*.
    o Configure free phone numbers
      Configure the Area code rule for which phone numbers with the dialing rule *Local call* have to be selected. All other phone numbers in the local area are dialed with the dialing rule *Local call (costs involved)*.

Other area codes
Calls to other area codes may be free. Configure which dialing rules must be used.

- All calls to other area codes are long-distance calls.
  Phone numbers with a different area code are always dialed with the *long-distance call* dialing rule.
- There are calls to other area codes which are free.
  Switch on this option, if there are cost free phone numbers with a different area code and which have to be dialed with the rule *local call other area code*. Configure for every area code area code rule for which phone numbers with the rule *local call other area code* have to be selected.

Automatic configuration
You can access these rules automatically on the internet. For this purpose, the supplier http://www.localcallingguide.com is used. Please always check the accuracy of the imported data, no guarantee is accepted for completeness. If this service is not available, you need to configure the rules yourself.
Information as to which phone numbers must be dialed as local calls from your location is available from your phone company.

5.2.8   Dialing prefix rules

These settings are only required for countries in North America.

A dialing code rule defines a series of phone numbers which must be dialed with a certain dialing rule.

A phone number consists of an area code and a (subscriber) phone number. The first digits of the phone number are known here as a prefix.

Area code
Enter the area code which is to apply for this rule.

List of prefixes
Here you can enter a list of prefixes. If one of these prefixes matches the number to be dialed this rule applies.

Example
A phone number which fulfils this rule reads: +1 (202) 333-5678

Enter 202 as the area code
Enter 333 as the prefix

5.2.9 Location concepts

Configuration options for systems with several locations are displayed in the locations designs. If the telephone system to be set up involves a single location, it should be configured based on the Location Settings. An attempt should be made to include the following issues in the system design:

- **Consistent Phone Number Range:**
    - Internal phone numbers corresponding to DDI
    - Internal phone numbers that have not been assigned multiple times
    - Location phone numbers can be assigned in blocks
    - Extensions can be quickly dialed across locations (in connection with or without a cross-network identifier)

    - Configure the individual locations based on the key performance indicators for the respective location.
    - In Advanced Location Settings, enable *Enable Location Integration* and *Determine Phone Numbers from Other Locations*.
    - To the extent that direct dialing of an abbreviated phone number across locations is possible, also enable *Abbreviate Phone Numbers before Dialing*. If dialing through cross-network identifiers is available, corresponding rules should be configured under PC Dialing. Alternatively, the telephone system can take over the conversion of the phone numbers to be dialed.

- **Arbitrary Phone Number Range:**
    - Internal phone number does not correspond to DDI
    - Internal phone numbers can be assigned multiple times
    - Location phone numbers cannot be grouped into blocks

    The internal phone numbers must be converted to fully canonical external phone numbers for arbitrary phone numbers ranges and for phone numbers outside phone number range (DDI/internal). For this, enter the transformations in Internal Rules. In this manner, the fully canonical representation can be sought from the internal phone numbers in the associated databases and, vice versa, the fully canonical phone numbers can be abbreviated before dialing the internal extension numbers. The rules necessary for this should be entered under PC Dialing.

5.2.9.1 Dialing rules

The dialing rules influence the formatting of phone numbers when dialing from a PC.

The phone number is formatted in this order:

1. **Formatting**
   All characters apart from + * # 0 1 2 3 4 5 6 7 8 9 a b c d e f g h i j k l m n o p q r s t u v w x y z are removed. All letters are turned into capitals.
2. **Vanity phone number recognition**
   If the number contains one of the configured vanity numbers and if the letters following it are valid according to the ITU E.161 rules the number is first converted into dialable digits.
3. **Further formatting**
   All digits apart from + * # 0 1 2 3 4 5 6 7 8 9 are removed.
4. **Recognition of specific numbers**
   A decision is made based on specialnumbers.xml as to whether it is an special number (normally emergency numbers). If the number is stored in the xml file it is dialed externally without further formatting.

5. **Recognition of specific external numbers**
   The decision will be made based on the rules for External Phone Numbers about whether an external phone number is involved or not. If an external phone number is detected, it will be dialed externally without additional formatting.

6. **Recognition of internal numbers**
   A decision is made by means of the internal numbers as to whether it is an internal number in the system. If an internal number is recognized it is dialed without further formatting.

7. **Phone number standardisation**
   The phone number will be converted to the international numbering plan.

8. **Transfer of Project Settings**
   If dialing has been initiated in connection with a Project Identifier to be dialed through the telephone system, it will now be applied to the phone number to be dialed.

9. **Transformation of external phone numbers into internal numbers**
   If you have configured a system phone number (system line) a check is made as to whether the phone number is an internal number. If an internal number is recognized the number is shortened.

10. **Using the PC dialing rules**
    The phone number runs through the special rules for PC dialing.

11. **Abbreviation of long Phone Numbers from Other Locations**
    To the extent that the Location Networking has been configured so internationally formatted phone numbers from other locations will be abbreviated to their DDI phone numbers, the phone number will now be abbreviated accordingly

12. **Transformation into a dialable number**
    The phone number is reformatted according to the rules of the configured country in a dialable phone number. The dialing rules of countries are saved in the Configuration file *countries.xml*.

13. **Using external dialing codes**
    The appropriate external dialing code(s) is/are added if the number has not been identified as internal yet.

14. **Using the PC final dialing rules**
    The PC final dialing rules are applied directly before the phone number is sent to the phone system.

15. **Dialing the number**
    The number is sent to the phone system.

> Dialing Phone Numbers directly without using Dialing Rules
> Prefixing the phone number with an exclamation point **!** will avoid the use of dialing rules. The phone number will then only be transferred directly to the telephone system driver without any formatting.

4

5.2.9.2 *Phone number formatting*

A phone number which is sent from the phone system to the PC has to be formatted accordingly before further processing. The ProCall One R2 always uses Super-canonical phone numbers.

The phone number is formatted in this order:

1. **Formatting**
   All digits apart from + * # 0 1 2 3 4 5 6 7 8 9 are removed.

2. **Application of the formatting rules**
   The rules of the Formatting rules are applied. For further processing, the modified (if necessary) phone number is used.

3. **Removal of the external dialing code**
   External dialing codes are removed if present. If an external dialing code is found the phone number is treated as an external number.

4. **Recognition of internal numbers**
   Provided that no dialing prefix was removed, it is decided by the length and rules for internal phone numbers whether it is an internal phone number.

- o Detection of Special External Phone Numbers, when the phone number is external
- o Phone numbers in the DDI Phone Number Range, when the phone number is internal
- o Detection of Special Internal Phone Numbers, when the phone number is internal (the phone number may have been modified)
- o Detection of Phone Numbers from Other Locations, when the phone number is internal (phone number will be given the appropriate long distance dialing codes).
- o If the length of the phone number corresponds to the specifications for an Internal Phone Number, when the phone number is internal
- o Phone number is external
5. **Removal of call-by-call dialing codes (only outgoing phone numbers)**
   Existing CallbyCall prefixes are removed for outgoing phone calls. The used prefixes are saved in a Configuration file *providers.xml*.
6. **Standardization of the number**
   The phone number is now converted in a super-canonical phone number.

5.2.9.3   External rules

External phone numbers:
If a telephone system is used, a difference must be made between internal and external phone numbers. Normally, internal phone numbers are recognized based on the extension range and the length of an internal phone number that has been configured for the telephone system. Deviating from this, it may be necessary to classify certain numbers that would normally be understood as internal phone numbers as external phone numbers.

The rules permit detection of phone numbers based on Regular Expressions or direct comparison. Each entry can be configured individually. If the Replace With column has been entered, the phone number will be replaced automatically. Subsequently, the phone numbers will not be formatted further, but should however be transferred in international format. The configured rules will be processed from top to bottom, until a match has been found.

Check:
The rules can be checked immediately. Enter the corresponding expression in the Phone Number field. If the phone number was detected and how it has been implemented can be seen in the output row. The rule used for recognizing and formatting will be highlighted.

➡ Specific Examples for the Use of Special External Rules:

- Detection of external phone numbers that would normally be understood as internal phone numbers (emergency numbers that are within the internal phone number range, but have not been assigned an extension (110, 112 and 911).

➡ If a comprehensive set of rules should be established, the list can be maintained outside the administrator's utility. Existing rules can be exported as XML or CSV files, adjusted correspondingly and then re-imported.

5.2.10   Formatting rules

You can change and individually format phone numbers with special rules. This can be done using Search/Replace or Regular expressions. Besides the formatting rules, phone numbers can also be changed internally/externally via those rules. Depending on whether the phone number has been registered by the telephone system or sent for dialing to the telephone system, the sequence of processing the rules will be changed. Additional information about the sequence in which the rules will be applied are described in the sections Phone Number Formatting and Dialing Rules.

The rules permit detection of phone numbers based on Regular Expressions or direct comparison. Each entry can be configured individually. If the Replace With column has been entered, the phone number will be replaced automatically. The configured rules will be processed from top to bottom until the first match has been found.

Formatting Phone Numbers that have been registered by the Telephone System
Note the order of the Phone number formatting.

- **Incoming**
  Phone numbers for incoming calls which are reported to the PC by the phone system are formatted with these rules.
  These phone numbers come directly from the phone system as dialable digits. They consist exclusively of digits and also * and #.
  The phone number may include an external dialing code and, optionally, be an international, national, local or internal phone number.
- **Outgoing**
  Numbers for outgoing calls which are reported to the PC by the phone system are formatted with these rules.
  These phone numbers come directly from the phone system as dialable digits. They consist exclusively of digits and also * and #.
  The phone number may include an external dialing code and, optionally, be an international, national, local or internal phone number.

Formatting Phone Numbers before They are transferred to the Telephone System for Dialing:
The sequence in which phone numbers will be adjusted for Dialing has to be observed.

- **PC dialing**
  Phone numbers for outgoing calls which are to be dialed.
  These rules will be applied after the phone number has been transferred in International Format.
  At networked locations, this list will show generated expressions, given a corresponding configuration in the Advanced Location Settings, in order to convert long phone numbers from other locations into DDI phone numbers.
- **PC dialing final**
  Phone numbers for outgoing calls which are to be dialed.
  These rules are applied directly before the phone number is sent to the phone system.
  The phone has already been formatted for dialing (with the External Dialing Code).

➡ Specific Examples for Formatting Phone Numbers:

  - Removing cross-network identifiers for registered phone numbers.
  - Setting the cross-network identifier when a call should not go through the external telecommunications provider but rather through the internal location network.
  - Replacing phone numbers when they should not be visible for other users at the application layer level.

➡ If a comprehensive set of rules should be established, the list can be maintained outside the administrator's utility. Existing rules can be exported as XML or CSV files, adjusted correspondingly and then re-imported.

5.2.10.1 Internal rules

Internal phone numbers
If a telephone system is used, a difference must be made between internal and external phone numbers.

Normally, internal phone numbers are recognized based on the extension range and the length of an internal phone number that has been configured for the Telephone systeme. Deviating from this, it may be necessary to classify certain numbers as internal.

The rules permit detection of phone numbers based on Regular Expressions or direct comparison. Each entry can be configured individually. If the Replace With column has been entered, the phone number will be replaced automatically. Subsequently, the phone numbers will not be formatted further, but should however be transferred in international format. The configured rules will be processed from top to bottom, until a match has been found.

Check:
The rules can be checked immediately. Enter the corresponding expression in the Phone Number field. If the phone number was detected and how it has been implemented can be seen in the output row. The rule used for recognizing and formatting will be highlighted.

➡ Specific Examples for the Use of Special Internal Rules:

- Detection of internal phone numbers not covered by the rules configured in the Telephone System.
- Conversion of internal phone numbers to external, when internal phone numbers and extensions (DDI) are different.
- Detection of internal phone numbers in system groupings with substitution through their representation in international format.

➡ If a comprehensive set of rules should be established, the list can be maintained outside the administrator's utility. Existing rules can be exported as XML or CSV files, adjusted correspondingly and then re-imported.

5.2.11 Vanity

Letters marked on the phone's keypad makes it possible to apply for numbers whose alphameric conversion corresponds to a certain name or concept. These are phone numbers which can be written as a text. Vanity phone numbers can be used in different areas (0700, 0800, 0180...). For example: 0800HANSMEIER.

Resolve vanity numbers:
Here you can define phone numbers for which you wish to use vanity numbers. Enter the dialing code without the national identifier number, e.g. 700, 800.

5.3 Regular expressions

Regular expressions are patterns with which strings can be searched. It is thus possible to determine whether the string fulfils specific parameters (length, begins with certain numbers, etc.) or to replace certain parts of the string.

Search for
This expression is used on the string. If a match is found, the string is replaced with the *replace with* expression. Hint: The caret (^) key can be found at the upper left of a keyboard with German layout.

A brief overview of the permitted expressions:

Character	Description

^	The beginning of the digit chain. The expression "^0" finds "0" only at the beginning of the phone number.
^	The caret directly after the left bracket ([) has another meaning. It is used to exclude the other characters within the bracket. The term "[^0-8]" permits digits from 0 to 8 only.
$	The dollar character labels the end of the character string. The term "152$" is valid for phone numbers which end with "152" only.
|	The slash allows both digits each side of it. The expression "8|9" allows "8 or "9".
.	The dot (.) permits any character (or any digit).
*	The asterisk (*) shows that the characters to its left must be present 0 times or more.
+	The plus sign (+) is similar to the star except that the character to its left must be present at least once.
?	The question mark (?) shows that the character to its left must be present 0 or 1 times.
()	The round bracket marks the expressions which are available in the **replace with** field.
[]	The square bracket marks a number of characters which are permitted at this location.

Replace with
Insofar as a match with the string was found, the string is replaced by the expression entered here. Parts of the found string can be inserted here:
\1 reads out the first expression marked with '()' in the *search for* field.
\2 reads out the second, etc..

Examples:

Effect	Search for	Replace with
Removal of a leading 0	^0(.*)	\1
Replacing a 80 at the beginning of a number (e.g. targeted external dialing code) with 0	^80(.*)	0\1
Removal of a private PIN which is added to the beginning of a phone number as 50xxx	^50[0-9][0-9][0-9](.*)	\1
Suppression of all numbers which are signalled internally (3 digits)	^[0-9][0-9][0-9]$	

Add an external dialing code code (leading 0) for all numbers with more then 3 digits	^([0-9][0-9][0-9].+)	0\1
Add the phone system base number (03012345) to all internal numbers (1 to 3 digits in length)	^([0-9][0-9]?[0-9]?)$	03012345\1
Add your own area code to all numbers which do not start with 0 and are at least 4 digits long (and thus not internal numbers).	^([^0][0-9][0-9][0-9].*)	08151\1

5.3.1 Advanced

Display all messages
estos ProCall One R2 often uses message windows which you can automatically suppress for future similar cases with the "Do not show again" option. Use this function to re-display all message windows which would otherwise not be opened again.

Reset layout
Click here to reset the current layout of the client to default. This implies restoring the default column widths in the tabs (e.g. journal, planned calls etc.) and a reordering of all tabs in the main window. Contacts saved are still remain.

5.3.2 Dialog adaptation with Templates

estos ProCall One R2 uses XSLT templates to display XML data as HTML pages. The XSLT templates are in the *Templates* or *Templates/default* folder.

Directory	Deployment
templates	You should save files you have changed in this directory if you wish to change one of the files supplied in templates/default.
templates/default	Configuration files which were installed with the product. These are overwritten if the product is updated.

XSLT processor
estos ProCall One R2 provides the files in XML format. These XML files are processed into an HTML page with the help of an XSLT template and an XSLT processor. Sablotron or Microsoft® XML Parser are used as XSLT processors.

Development of own templates
You can develop and use your own templates. You should familiarise yourself with XSLT syntax for this. You can find help on the subject athttp://www.w3schools.com/xsl/ or the Microsoft® MSDN pages.

If you wish to use templates you have developed by yourself these should be stored in the *template* directory. Your changes will then not be lost if an product update is installed.

Template	Deployment

common.xslt	Provides different template functions for e-mail and web links and for transcoding sets of characters
unanswered.xslt	E-mail messages regarding unanswered calls. More precise details can be found in the estos UCServer help file.
contact.xslt	Overview page in the Contact details window.
RemoteContact.xslt	Is used in the Call window to prepare the details for the current dialog partner. The template defines which contact details are displayed.
HoldContact.xslt	Is used in the Call window to prepare the details for a dialog partner on hold. The held dialog partner is displayed if a further estos ProCall One R2 user is holding a participant and calls you. The template defines which contact details are displayed.
LocalContact.xslt	Is used in the Call window to prepare the details for a called contact. The called contact is displayed if a contact for an incoming call to the phone number is found. You must activate the hotline service in the settings for Incoming calls for this. The template defines which contact details are displayed.
RedirectedContact.xslt	Is used in the Call window to prepare the contact details for a redirected call. You are shown the contact for whom the call was last signalled. The template defines which contact details are displayed.

⚠ When changing the templates, please keep in mind that the *common.xslt* must always be in the same directory as the template using the *common.xslt*.

5.3.3   Function control via Windows® Registry

All necessary settings which are saved in the Windows® registry can be changed in the estos ProCall One R2 user interface. You can, nevertheless, also activate or deactivate special functions in estos ProCall One R2 by means of certain keys.

⚠ Please note that the functions mentioned here only make sense in exceptional cases and their use is not generally recommended.

All the following listed registry values are expected in the **HKEY_CURRENT_USER\Software\estos\ProCallOne\CtiMain** key. The registry value must be created below this key to enable the relevant function in estos ProCall One R2.

Registry entry	Type	Meaning
JournalAutoCreateFlags	DWORD	With this registry entry you can control whether estos ProCall One R2 generally automatically creates a journal entry in Outlook® for all incoming and/or outgoing calls.

		Set the DWORD value to "1" to always automatically create an Outlook® journal entry for all incoming calls. With value "2", all outgoing calls are always included. Set the value to "3" to log all calls in Outlook®.
EnableOutlook® EnableMAPI	DWORD	Use these two registry values if estos ProCall One R2 is to use neither Outlook® nor MAPI. To switch off the connection to Outlook® or to not use MAPI, set both DWORD values to "0". These registry entries have no effect if you do not have Outlook® installed or if no MAPI is available in the system. Please also note that these values have no effect on the Outlook® plug-in.
EnableLotusNotes	DWORD	Use this registry value if estos ProCall One R2 should not use IBM Notes® which is installed on the computer. Set the DWORD value to "0" to switch off the connection to IBM Notes®. This registry entry has no effect if you do not have IBM Notes® installed.
HeroldAPILicenseName HeroldAPIKey	String	Enter your Herold-API-Licence name or your Herold-API-Key here, if you want to give the licence name API and API-Key administratively. If so, the user cannot enter the licence name API and API-Key into the user interface. The Registry data can be also rolled out by group guidelines.
HotkeyDelay HotkeyTimeout	DWORD	Is a dialing of a phonenumber via Hotkey not working, so you can try to set a longer delay time, so the other applications have more time to put the selected text into the clipboard. For this the following keys are available: • HotkeyDelay = Waiting period in milliseconds until a new attempt will be started • HotkeyTimeout = Timout in milliseconds until the hotkey selection will be cancelled.

5.4   Telephony

In **Telephony** you can customize the call window to your needs, choose settings for incoming, outgoing, unprocessed and planned calls and also define projects. Additionally you can configure your Bluetooth connection here.

- Conversation window

- Incoming calls
- Outgoing calls
- Planned calls
- Projects
- Bluetooth Cell Phones

5.4.1 Conversation window

Display automatically for incoming calls
Display automaticaly for outgoing calls
You can define whether you wish the call window to be displayed for incoming or outgoing calls. If the window is not displayed automatically you can display it at any time during the call via the estos ProCall One R2 task bar.

Always display active calls as the topmost window
You should activate this option if you wish to always display active calls as the topmost window. If the window is automatically displayed, it is normally displayed as the topmost window for an incoming or outgoing call but can then subsequently be covered by other windows. You can bring all curent calls into the foreground via the tray icon at any time.

Duration of displaying the conversation window after the call ends
After ending the telephone call the call window remains open for a certain amount of time. During this time it's possible to allocate this call, for example to a certain Project or to enter a short note. Here you can specify how long the window should remain open.

Transparency, support display and fading out
The call window supports transparency and is normally faded in and out. If you do not wish to use this function you should deactivate the transparency.

Window position
You can define the position as to where the call window opened by estos ProCall One R2. Call windows for prepared calls are excluded. These windows are always opened at the current position of the mouse.

- **Default position (task bar icon)**
  ProCall One R2 opens the conversation window at an appropriate location on the screen. Other, already open windows of ProCall One R2 are not overlaid.
- **Remember last position**
  The conversation window appears again at the same position where you have closed it the last time or where it was automatically hidden.
- **Define position using preview**
  Open a call window with the preview button and place it where windows should open it in future. Moving the conversation window during a call has no effect on the display position.

5.4.2 Incoming calls

Support for Hotline-Services (client function)
The hotline service analyses the number called for incoming calls (multi-entity capability). Analysis of the number called can be used to differentiate between various companies if you have to announce yourself differently depending on the number called (e.g. for a secretarial service).

Activate the option **Display called contact,** so that the contact information is displayed in the Call window of an incoming phone call. What information should be displayed can be defined via a template.

Unanswered calls
estos ProCall One R2 detects calls that have not been answered. Notifications about these unanswered calls can be sent as email or text messages. Whether such notifications should be sent and the email address or

provider that should be notified can be defined using these settings. Moreover, unanswered calls can be automatically marked as processed when a telephone call was made to the same contact at a later date.

➡ In addition to the server-side search for client contacts, local client folders can be specified in the settings of the Data sources.

➡ If the matching client contact should be opened automatically during the phone call, then it can be specified in the settings Actions.

Send unanswered call notificaitons as email

Send notifications to the following email address
If this option has been enabled, email will be sent upon receipt of an unanswered call according to the Send Email configuration.

Use the caller's email address as the sender
If this option has been enabled, the sender address for the notification will be set to the caller. Doing so allows direct contact with the caller.

➡ If a Groupware solution with absence notifications is used, the caller will receive a message with the provided absence note. This provides the caller with the best information about when a person can be contacted again or about contacting co-workers during the absence.

Attach caller contact details to the email as a vCard
Contact information determined through contact search can be automatically attached as vCard to an email. This allows access to all the caller's contact data, even when on the road.

Give Telephony link the following prefix
Enable this option, if a phone number should be formatted as a link when sending notifications of unanswered calls by email. The target will be specified in the hRef attribute of the introductory <a> tag. This target may be standardized with the help of a prefix. The following prefixes are available for pre-selection.

- **tel:** (Preset setting for Android, Blackberry and iOS, for example)
- **phone:**
- **callto:**

Furthermore, you have the option of assigning an individualized prefix (up to 9 characters plus colon). Note: the prefix must be terminated by a **colon**. If you do not want to use prefixes then disable this option. In that case, phone numbers will not be formatted as links in notification messages.

Send unanswered calls as text message

Using the following provider:
If this option has been enabled, email will be sent upon receipt of an unanswered call according to the Send Text Message configuration.

Use the caller's number as the sender address for the text message
Enable this option when the caller's telephone number should be used as the sender address for the text message for notification of unanswered calls.

Exceptions

- **For internal calls**
  No notifications will be sent for internal calls.
- **Calls with blocked phone numbers**
  No notifications will be sent for calls with blocked numbers.
- **If contact data could be not determined**
  No notifications will be sent for callers whose contact data could not be determined.
- **For calls repeated on the same day**
  If the caller makes more than one attempt on the same day, no notifications will be sent.
- **For phone calls repeated without user login**
  If calls are made repeatedly and the user has not log into the system, for example, because they are on vacation.
- **If the call rang for less than 2 seconds**
  If the caller rang for less than 2 seconds. This prevents returning calls that were made unintentionally.
- **If the calling number has been stored in this list**
  Permit the exclusion of certain extensions or phone numbers from notifications. Such numbers may include, for example, the reception desk.

5.4.3   Outgoing calls

Call preparation
The option **Always prepare phone calls** enables you to set projects projects or set the private marker on the calls. This setting is not needed if projects or the marking of private calls are not used.

Automatic redialing
If an outgoing call does not go through because the line is busy, you can start automatic redialing in the call window. You can define how often the system will try to connect the call and at which intervals. Automatic redialing is terminated as soon as the line is no longer busy or the set number of attempted calls has been reached.

Suppression of caller ID
You can activate the suppression of caller ID for outgoing calls if this is supported by your telephone system. You may activate caller ID suppression for all outgoing calls or choose case by case whether you wish to suppress caller ID. If you wish to suppress caller ID in individual cases only, an additional button for activating or deactivating this option appears in the call window. Please keep in mind that this option must be activated before you start the call so that the caller ID can be suppressed.

5.4.4   Planned calls

With planned calls, you can have yourself reminded at a specified time of calls to be made or plan upcoming calls in advance. Planned calls appear in the main window on the tab of the same name.

estos ProCall One R2 offers you two options for managing planned calls:

estos ProCall One R2

- **Administration with estos ProCall One R2 (recommended):**
  Planned calls are only saved in estos ProCall One R2 and can be added and changed in the estos ProCall One R2 editor.
- **Management with Outlook®**
  Planned calls are saved exclusively in Outlook® and can only be saved with the Outlook® editor.

Please note that the possibilities for subsequent alterations to the phone number and the linked contact are limited as only Outlook® contacts can be subsequently linked.

5.4.5 Projects

estos ProCall One R2 helps the user assign calls to previously defined projects. This feature is also available from the Journal as well as the telephone system itself. The project identifier should be selected from the server through the system as would be appropriate for the project settings. Making private calls through so-called calling card providers is the exception to this. If a call is marked as private, the call through the telephone system can be configured using the identifying numbers.

If the **Mark private calls** option is activated a call can be marked, for example, as private in the call window.

Use projects and code numbers
In estos ProCall One R2, projects are predominantly configured for the journal. In addition, specifics PINs and calling card providers can be defined for private conversations. If the project has been defined as a private call then the PIN will be used for the call and it will not logged in the journal.

The following rules apply:

Character	Deployment
0-9 * #	Digits which are dialed normally
C	Here you wait for the remote station to accept the call.
e, E	Place-holder for entering a PIN. With E, the number of digits for entry is not important. With e, the number of digits is defined by the number of letters (eee for three digits).
u, U	Space for the input of a user ID. With 'U' the number of digits input is not important. With 'u' the number of digits is defined over the number of the letters ('uuu' for three digits).
p, P	Dialing pause: 'p' for 0.5 seconds, 'P' for 1 second.
N	Space for the number to be chosen. If the space is not set, the number is automatically transferred to the end.
J	Defines, if available, that the user login and pin number entered by the user is noted in the journal.
X	If available, the phone number should be dialed with an external prefix. If 'X' is absent the phone number is dialed in national format (03012345678).

In the user interface configured projects are visualised centrally and locally with differently coloured Icons:

Projects configured in estos UCServer.

Project for the journal

🔖 Project for dialing

📌 Project for dialing and for the journal

🔒 Project configured in estos UCServer which is processed as a private call

🔖 Projects configured in estos ProCall One R2:

📌 Project for the journal

🔒 Project configured in P estos ProCall One R2 which is processed as a private call

5.4.6   Bluetooth

Support for Bluetooth Cell Phones
Cell phones can be connected with the PC using Bluetooth. This connection will make controlling and monitoring of the telephone possible. The telephone must support the Bluetooth handsfree profile. This is also be used with a speaker phone in the car.

All cell phones that have been connected with the PC can be automatically used. Alternatively, only those telephones that are desired for use can be selected from the list of connected devices.

Connect New Devices with the PC (Bluetooth pairing)
The cell phone must be connected with the PC (Bluetooth pairing) in order to be able to use it.

Phonebook
The Phonebook of the mobilephone/cellphone can be optionally integrated.

Offline journal
If the Bluetooth connection will be interrupted and available at a later moment, all calls will be synchronized. Please note that such calls have no duration at the journal.

5.5   Search

In **Search** you can control the search behavior of estos ProCall One R2, in particular by selecting which data sources and search-parameters should be used in the detail search.

- Data sources
- Search parameter
- Search result

5.5.1   Data sources

The data source settings contain the list of all contact data sources which are to be used when searching for contact definition.

Using the data source estos ProCall One R2 favorites you can search all contacts in your favorites and thus find quickly.

In addition, your personal inbox is imported from Outlook® when estos ProCall One R2 is started if you have Outlook® installed on your computer and have not specified any other folders. The IBM Notes® default address book is configured in the same way.

5.5.1.1 General settings

The search behavior can be set for each data source in the list. The general settings can be changed directly in the overview list or by clicking the **Edit** button on the **General** tab.

- **Use in search filter "All"**
  If this option is selected for a data source the data source is searched if the "All" filter is selected in the search field.
- **Search on incoming call**
  For every call, estos ProCall One R2 automatically searches data sources for the phone number in order to find the call partner. You can define here which data sources are to be used for this. It is recommended that especially slow data sources are not searched when contact search.
- **Use if tenant function**
  In addition to the phone number search to find out the call participant, ProCall One R2 can also search a contact, the client, for the phone number on your own telephone. This function is useful, e.g. for hotline services, and you should only activate it if the data source contains client contacts and you want to show the client contact, e.g., in the call window. Please note that the tenant function can not be used for the data source "estos ProCall One R2 user" as well as for phonebook data sources.
- **Treat as unpersonalized data source**
  As well as your personal contact data sources you can also use estos ProCall One R2 with unpersonalized data sources (mainly phone books). However, the search of phone books only makes sense if there is no contact in your personal contact data sources which corresponds to the search criteria. Activate this setting if the data source should only be searched when no contact is found in the personal data sources already searched. Phone book data sources are a typical application case.

5.5.1.2 Data source search sequence:

estos ProCall One R2 permits you to define the order in which the data sources are searched. The topmost data source in the list is always processed first. Click the **Move up** button to move the selected data source up one place. Similarly, use the **Move down** button to move the selected data source one place lower down in the list. Please note that all data sources with the **Treat as phone book** option are always searched at the end and therefore must always be at the bottom of the list.

5.5.1.3 Adding data sources

New data sources can be linked at any time in estos ProCall One R2. For this, click the **Add** button and select the data source option.

- **Outlook®**
  Click here to add an Outlook® mailbox or a specific Outlook® contact folder to the search list. Please note that you can only select mailboxes or contact folders in the selection dialog. If you add a mailbox this is automatically configured so that all subordinate contact folders are also used in the search. Subordinate folders are not, however, included for added contact folders. This behavior can be altered at any time with **Edit**.
- **Exchange Web Services**
  The Contacts folder can be added using Exchange Web Services from here. As with Outlook®, all sub-folders for mailboxes will be used automatically, but not with normal folders.
- **IBM Notes®**
  Click here to add a IBM Notes® address book to the search list. The configuration dialog assists you with integration and offers default settings. You can change the configuration at any time with "Edit".

- **ODBC**
  Click here to add an ODBC data source to the search list. You can thus use contact data which you have stored, for example in a Microsoft® Excel file or a Microsoft Access® database, directly in estos ProCall One R2.

  The configuration dialog supports you with connection and specifies default values. You can modify the configuration at any time with **Edit**.

  Please note that for this function the appropriate ODBC driver must be present on your system. The use of a estos MetaDirectory is recommended to integrate larger data stocks for performance reasons.

- **Add phone book**
  estos ProCall One R2 offers you the option of adding phone books installed locally on your computer. Although estos ProCall One R2 automatically recognises locally installed phone books it may be necessary to specify the installation manually. With installation of the "Das Telefonbuch Deutschland" or "Herold" please manually configure the installation path of the product, with the installation of "TwixTel" the path must be always given to the data CD.

  Please note that for the integration of the "Herold" phone books the licence key for the phone book DVD network application (or phone book CD intranet application) is required, in addition to a licence name API and API-Key. The error message "The programmer licence key is not valid" points to the fact that either no API-Key was entered, or the given API-Key does not fit to the API Key-licence name nor to the licence key of the phone book application. The Herold API licence name and API Key can also be rolled out administratively, while this is entered on the Registry value "HeroldAPILicenseName" and "HeroldAPIKey" (cf. control function via Windows® Registry).

  You can also integrate phone books into estos ProCall One R2 which are not installed locally but centrally. For this, you must configure the phone book in the estos MetaDirectory and connect the estos MetaDirectory as a phone book.

- **Add MetaDirectory or LDAP data source**
  You can integrate both a estos MetaDirectory and normal LDAP data sources into estos ProCall One R2 with the help of the database wizard. Field allocation is automatic in the case of estos MetaDirectory.

- **DATEV SDD**
  Click here to add the DATEV SDD database to the search list.

5.5.1.4   Editing data sources

Specific data source properties can be viewed or modified via the **Edit**button. Alternatively you can double-click a data source list entry.

- **Edit Outlook® folders**
  Select the**Include all sub-folders when searching** option on the **Advanced** tab if all subordinate contact folders should be searched in addition to the folder itself.

  On the **Name search** tab you can specify a list of fields which should be additionally included in name searches in Outlook® folders. The Last name, First name and Company fields are already searched by default. Please note that the name search fields apply globally for all Outlook® folders.

  Example:
  Click **<Add field here>** and select the **Item.Department** entry from the list. The subsequent name search will then find all Outlook® contacts which match the search criterion in the **Department** field.

- ![icon] **Edit Exchange Web Services**
  The settings available are the same as those for Outlook® folders.
- ![icon] **Edit IBM Notes® folders**
  The tab **Advanced** displays the most important details of the selected IBM Notes® Directory. Select the button **Configure** in order to change the parameters.
- ![icon] **Edit ODBC connection**
  The tab **Advanced** displays the most important details of the selected ODBC connection. Select the button **Configure** in order to change the parameters.
- ![icon] **Edit phone book**
  Here you can query the installation path and the current status and, if necessary, information about the connected phone book. Please note that the installation path can only be changed if you remove and re-attach the current phone book.
- ![icon] **Edit MetaDirectoryor LDAP data source**
  On the **Advanced** tab, information can be retrieved about the selected data source or configuration of the data source. The database wizard assists with this. Please note that a centrally configured estos MetaDirectory can only be changed in estos UCServer and not in estos ProCall One R2.
- ![icon] **Edit DATEV SDD data source**
  Check **Use Comments from Communication Details as the Contact Person's Name** so that contacts maintained in the Comments entry in DATEV Arbeitsplatz Pro can also be found.

Please note that with data sources that are administratively defaulted by group guidelines, the configuration cannot be edited by the User.

5.5.1.5 Deleting data sources

Click **Delete** to remove an additional data source.

➡	If a data source could not be integrated this is indicated by an exclamation mark in the data source icon. An error description is displayed in the tooltip if you place a mouse pointer over the data source icon.
➡	Local mail boxes from Outlook® or IBM Notes® are added autimatically at the start of estos ProCall One R2 if no data sources were configured for Outlook® or IBM Notes®.
➡	If at Start, estos ProCall One R2 recognises a phone book that until now is not configured, this is included in the data source list automatically.
⚠	"Das Telefonbuch Deutschland" or "Herold" must be installed on your computer with the phone book data bank. To copy the phone book database (without installation) is not sufficient.
⚠	DATEV integration automatically gives priority to contacts from DATEV databases for the resolution of phone numbers after initial installation. This setting can be changed by the user in the database settings.

5.5.2 Search parameter

On the settings page "Search parameters" you can define the fields which estos ProCall One R2 uses in the detail search. There you can define their order and other options for the detailed search.

The following search parameters are preset in estos ProCall One R2:

- Last name
- First name
- Company
- Customer ID
- Department
- Postcode/City
- Street
- Phone number
- Email Address

Customize the search parameter sequence

Use the "Up" or "Down" buttons to shift the search-parameter either upwards or downwards in the list. The search-parameter order in the list determines their position in the detail search.

Activate or deactivate search parameter

The search parameters can be activated and deactivated. Only enabled search parameters are used in the detailed search. Checkmark the box on the list to activate the search parameter. Delete the checkmark on the list entry not to use the search parameter in the detailed search.

User-defined search parameter

User-defined search parameters can also be laid out in estos ProCall One R2 beside the given search parameters. These allow the user to consider other contact fields not normally displayed in the detail search.

Configure user-defined search parameter

Click on **Add** to create a new user-defined search parameter. Click on **Edit…** to change the selected user-defined search parameter.

1. Allocate a name to the user-defined search-parameter. This name is used in the list of all search-parameters and in the tool tip for the detail search.
2. Select the corresponding contact fields which should be considered in this search-parameter. A user-defined search-parameter can also search several contact fields at the same time. In this case the contact is found when the search word matches the content of only one contact field.

Example:

A user-defined search-parameter should be added in order to find a contact by its SIP-Address in the detail search.

1. Enter **SIPAddress** in the name field.
2. Tick the box before the field name to select the "SIPAddress" in the contact field list.
3. Confirm your entry with **OK**.

> ➡ With the command **delete** every user-defined search-parameter can be deleted again. Please note that only user-defined search-parameters can be edited or deleted.

5.5.3 Search result

Here the search result can be adapted and defined for the user. With this the order of the contact fields to be displayed can be set as well as their appearance and click actions.

Available contact fields

In the list of the available contact fields the corresponding tick-box next to a contact field can be activated if this contact field should always be shown in the search results. With the buttons **Up** or **Down** you are able to change the order of the contact fields in the search results.

Customize Layout settings
On the **layout** tab the general appearance of the selected contact field can be adapted.

Layout Option	Description
Display in compact view	Indicates whether the contact field is also displayed in the compact view. If the box is not ticked, the contact field is only shown in the detail view.
Display field names	Specifies if the field name should be displayed next to the account of the contact field.
Insert paragraph before field	Allows a better overview with the help of paragraphs to group and structure contact fields.
Display in bold type	With this option the contact field is displayed in bold type and is thereby emphasised.

tab **Customize field**
Here you can further customize the appearance of the contact field selected from the contact field list. The setting possibilities vary, depending on the selected contact field.

Specify contact field actions
On the **Actions** tab, actions which are executed by clicking on the contact field can be changed. All contact functions of the contact menu are available here as well as all User-defined actions.

In addition, up to three different actions can be put on one contact field, either by using no key, holding down the CTRL key or holding down the Shift and CTRL key together, while clicking on the corresponding contact field in the search result list.

➡ The button **Default** resets the default layout.

➡ Only contact fields which are not empty are displayed in the search result.

➡ All contact fields are displayed in the search result (including the compact view) which were searched for.

5.6 Integration

Calendar and journal connections are controlled in **Integration**.

- Calendar
- Journal
- DATEV

5.6.1 Calendar

Appointment details can presently be read either from the Outlook® or from the IBM Notes® diary. In Windows® 10 you can also use the included calendar app.
If you use multiple Systems, you can select the system you use as the data source.

- **None**
  No data is transferred to the ProCall One R2.
- **Public appointments only (default setting)**
  Only appointments which are marked as public are transferred to the ProCall One R2.
- **Private and public appointments**
  All appointment information is transferred to the ProCall One R2.

5.6.2 Journal

estos ProCall One R2 uses an integrated log. All incoming and outgoing calls will be recorded there. In particular, estos ProCall One R2 makes copying journal entries to Outlook® or IBM Notes® possible.

Select data source:
If you use both Outlook® and IBM Notes®, you may selected your preferred system as a data source.

Setup journal file
estos ProCall One R2 always lays out the journal copies in the set journal folder. If another journal folder should be used, this can be changed here with the "Search" button. Please note that only the journal folder can be selected in the choice dialog. Select "default" to activate the default-journal folder.

Create automatic journal copies
In addition to the option of placing a copy of a journal entry in Outlook® or IBM Notes® manually via the context menu, estos ProCall One R2 can also prepare automated journal entries of telephone calls in Outlook® or IBM Notes®:

- **For a call memo**
  Activate this option, and estos ProCall One R2 will always store a journal copy in Outlook® or IBM Notes® as soon as you enter a memo about the call in the call window while you speak.
- **Contact from own mailbox**
  Activate this option and estos ProCall One R2 will always store a journal copy in Outlook® or IBM Notes® as soon as a contact from one of your personal contact files was assigned to the call.

⭐	Use the Journal browser for a more detailed call journal.
➡	Since estos ProCall One R2 keeps a journal provided by the server, journal entries for every call in Outlook® or IBM Notes® are not necessary. This saves unnecessary objects and ensures lasting high-quality performance of Outlook® and IBM Notes®, respectively.
➡	You can see an overview of your last calls in the estos ProCall One R2 main window if you click the Journal tab.
➡	For special requirements, it may be necessary to save all calls as journal entries in Outlook® or IBM Notes®. This service can be activated in the Windows® registry. Details can be found at Control functions via Windows® Registry. Please note that activation of this function is not recommended!

5.6.3 DATEV integration - Automatic Data Transfer

estos ProCall One R2 can automatically synchronize data between DATEV Arbeitsplatz Pro and estos ProCall One R2 in large part. By setting "Automatic Data Transfer", all phone calls will be synchronized (regardless of any properties) with DATEV Arbeitsplatz Pro. Setting the following options has a restrictive effect (similar to black listing) on synchronization with DATEV Arbeitsplatz Pro.

- **Answered Calls Only:** Missed calls will not be synchronized automatically with DATEV Arbeitsplatz Pro. However, they can be subsequently synchronized from the estos ProCall One R2 Journal for Unanswered Calls.
- **External Calls Only:** Calls from your organization will not be automatically synchronized against DATEV Arbeitsplatz pro.
- **DATEV Contacts Only:** Only those calls from contacts that have already been created in the DATEV master data service (SDD) will automatically be synchronized with DATEV Arbeitsplatz Pro. A connection to the DATEV master data services (SDD) must have been configured already and be available for this feature.

5.7 Services

- Mail dispatch
- SMS text dispatch

5.8 E-Mail dispatch

estos ProCall One R2 supports sending email. This transmission feature is used for administrator error notifications and events, as well as for notifying users of unanswered calls.

SMTP server
Host name, or IP address and port number, for the mail server. By default, the port number will either be 25 (SMTP), 465 (SMTPS) and 587 (SUBMISSION). The TLS encryption will be used (except on port 25) if supported by the mailserver.

Login name (optional)
User name for the SMTP connection (SMTP AUTH)

Password (optional)
Password for the SMTP connection (SMTP AUTH)

Sender's e-mail address
The sender's e-mail address.

Recipient's e-mail Address
The administrator's e-mail address for the delivery of error messages.
You may enter multiple adresses separated by a semi-colon.

Allow e-mails with UTF-8 (UNICODE) contents
Allows the server to send e-mails in UTF 8 code. If you deactivate this option, e-mails can send only characters known in the ISO Latin code page of the operating system.

Force TLS
Activates forced TLS encryption. If the server does not provide any encryption, transmission will fail.

Validate...
A test message will be sent, which may take a few minutes. A pop-up dialog will then appear, which will report on the success or failure (including potential error message) of the test.

5.9 SMS dispatch

estos ProCall One R2 can offer SMS dispatch using several providers. To use these services, you must be registered with one of the providers listed who will invoice you for this service.
Fees may vary depending on the provider. With some providers you have to have a static IP in order to use the service. Simply compare the various providers and pick out the most favourable one for you.

Configuration

- Select one of the SMS providers listed.
- Enter the data specified by the provider into the field user name and password.
- Various providers allow the use of gateways to take advantage of certain features. A short text describes the individual gateways and their features.
- Depending on the provider, you can also include the return address with the query. If this option is offered by the provider, you can choose between three different ways of defining the return address. If you choose to use the mobile phone No. configured in the user profile, only those users having a mobile phone number may use the SMS function.
- Sending a test SMS permits you to test the configuration.

➡ In principle, every service provider can be connected if it has a HTTP GET or POST interface. For this the configuration file has to be adapted accordingly in the installation list *config\smsprovider.xml*. The template can be found under *config\default\smsprovider.xml*.

5.10 XSL templates

The estos ProCall One R2 uses XSL Templates (short: XSLT) for the display of XML data as html sites. The XSL Template files are in the *Templates* or *Templates/default* directory.

Template	Deployment
unanswered.xslt	E-mail notification of unanswered or forwarded phone calls. View XSL templates for e-mail notification

XSLT processor
estos ProCall One R2 provides the data as XML files. These XML files are processed into an HTML page with the help of an XSL template and an XSLT processor. Either Sablotron or the Microsoft® XML Parser are used as an XSLT processor.

Development of own templates
You can develop and use your own templates. You should familiarise yourself with XSLT syntax for this. You can find help on the subject at SelfHTML or the Microsoft® MSDN pages.
If you wish to use templates you have developed yourself these should be stored in the *config* directory. Your changes will then not be lost if an product update is installed.

5.11 XSLT for e-mail notification

The *unanswered.xslt* file is used for e-mail notification of unanswered or forwarded calls.

The XML files on which the template is used are created by the ProCall One R2. File *sample_unanswered.xml* contains example files for an unanswered call. File *sample_redirected.xml* contains example files for a forwarded call. The files are to be found in the *templates/default* directory.

You can use the *msxlt.exe* program supplied to apply an XSLT to an XML file. Open a command line in the installation directory:

```
msxsl.exe templates\default\sample_unanswered.xml
templates\default\unanswered.xslt -o unanswered.htm
```

If the logLevel is set under Events on debug, a XML file is provided in the list *logs* for every unanswered phone call. You can use this for the development of your own XSL templates.

5.12 Configuration file location

Location configuration
The configuration of the locations is always stored in an *xml* file. The file is in *config\locations.xml*.

Country dialing rules
The dialing rule table contains the country dialing rules. These are stored in the *countries.xml* file. It contains the names of the countries and the appropriate dialing rules for local, national and international calls.

```
<?xml version="1.0" encoding="UTF-8" standalone="no" ?>
<countries xmlns="http://www.w3.org/2001/XMLSchema.xsd">
<country ID="49">
 <countryCode>49</countryCode>
 <name>Germany</name>
 <SameAreaRule>G</SameAreaRule>
 <LongDistanceRule>0FG</LongDistanceRule>
 <InternationalRule>00EFG</InternationalRule>
</country>
</countries>
```

Icon	Meaning
E	Country code
F	Area code
G	Local number
I	Optional dialing code
N	Optional long distance provider

Call-by-call country dialing codes
The *providers.xml*l file contains the known call-by-call dialing codes for individual countries.

```
<?xml version="1.0" encoding="UTF-8" standalone="no"?>
<providers xmlns="http://www.w3.org/2001/XMLSchema.xsd">
 <provider ID="10???" countryID="41">
 <name>General</name>
 </provider>
 <provider ID="10703" countryID="41">
 <name>Smartphone</name>
 </provider>
 <provider ID="01090" countryID="49">
 <name>O2</name>
 </provider>
</providers>
```

Day	Meaning
countryID	ID of the country in countries.xml
ID	Provider dialing prefix (*?* is a place-holder for any digit)

Dialing codes and place names
The *cities.xml* file contains the known place names for the country dialing codes.

```
<?xml version="1.0" encoding="UTF-8" standalone="no"?>
<cities xmlns="http://www.w3.org/2001/XMLSchema.xsd">
 <city ID="+1201" countryID="1">
 <name>New Jersey</name>
 </city>
 <city ID="+4989" countryID="49">
 <name>München</name>
 </city>
</cities>
```

Day	Meaning
countryID	ID of the country in *countries.xml*
ID	Area code

Special phone numbers
The *specialnumbers.xml* file contains the known country special phone numbers. These are numbers which are not internationally dialable, e.g. emergency or information numbers. No dialing code is added to these numbers during formatting.

```
<?xml version="1.0" encoding="UTF-8" standalone="no"?>
<specialnumbers xmlns="http://www.w3.org/2001/XMLSchema.xsd">
 <specialnumber ID="110" countryID="49">
 <name>Notruf</name>
 </specialnumber>
</specialnumbers>
```

Day	Meaning
countryID	ID of the country in countries.xml
ID	Phone number

5.12.1.1 *Telephone number formats*

Supercanonical number
A phone number format which allows the unique international identification of the participant. The estos

UCServer and estos ProCall exclusively use the super-canonical phone number format for all phone numbers. For the display the simplified number is sometimes used (if available). Phone calls are carried out with the shortened phone number.

Supercanonical phone numbers always begin with a + and have the following format: **+Country City Number** But no spaces are used. e.g. +49301234567
The number should only contain digits and +.

Service numbers

are special public phone numbers which cannot be given in international number format. These are for example emergency numbers (110) or directory enquiries (118xx). In order to be able to dial these numbers from a PC they must either be longer than the internal phone numbers or configured as external rules. these numbers are specified directly as dialable numbers:

DDI Phone number

Direct Dialling In phone number. External phone number of a participant in the system. This phone number can be displayed in its short form as well as in the international form bconsisting of country, dialing code and DDI. DDI numbers will be shown in short form for the same location, the system uses the international form internally.

Phone number

No spaces are used. Example: 11833

Dialable phone numbers

are always kept in the format required by the phone system in order to reach the subscriber. The number is formatted according to the rules in estos UCServer.

Examples:

Phone number internal extension number

Phone number external dialing code Number of subscriber 12345 in the local area network

External dialing code Country Area code Phone number Number of a subscriber in a different country

The above examples apply for Germany and depend to a large extent on the regions. You can see which dialing rules apply for your location in the location settings.

Phone numbers for display

are used by estos ProCall insofar as this form consisting of the country code and the area code can be determined.

+Country (area code) number

Example:

+49 (30) 123456 Phone number of subscriber 123456 in Berlin, Germany

6   Info about estos ProCall One R2

estos ProCall One R2 is a product of estos GmbH.

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For product updates visit http://www.estos.de/

Frequently asked questions and answers and also support are available at http://support.estos.de

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