Panasonic

Quick Reference Guide
Communication Assistant Client

Model No. **KX-NCP Series**
KX-TDE Series

Thank you for purchasing this Panasonic product.
Please read this manual carefully before using this product and save this manual for future use.

In this manual, the suffix of each model number is omitted (e.g., KX-NCP500**NE**).

Introduction

Communication Assistant (CA) Client is a Computer Telephony Integration (CTI) application that integrates with your Panasonic PBX, and allows you to perform various telephone operations from your PC.

About the Quick Reference Guide

This Quick Reference Guide is designed to serve as an overview of the features, setup and installation of Communication Assistant Client.

The Quick Reference Guide is divided into the following sections:

1 Specifications

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

2 System Connection Diagram

This section shows how Communication Assistant Client fits into your network.

3 System Requirements

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

4 Software Installation

This section explains how to install and uninstall Communication Assistant Client.

CA Server

CA Server is a separate program that, when installed on your network, enhances the features of CA Client. Settings for CA Server can also be managed on any computer on the server's network via a web browser, using the CA Web Manager client. For more information about CA Server, contact your dealer.

Note

CA Server is required to use CA Client with KX-TDE Series PBXs. For more information, see **3 System Requirements**.

IMPORTANT

CA Client stores personal information. In order to prevent data theft and leakage, we recommend the following:

- Set a password-protected screensaver to activate after your computer has been idle for a set amount of time.
- Use Windows Update to keep your system up-to-date with the latest software patches.
- When users change extensions, desks, etc., make sure that the access rights for their previous and new extensions are correct.
- Set a login password that is at least 5 characters long, and contains a combination of letters and numbers.
- Periodically change all login passwords to prevent unauthorised access by third parties.
- When the computer used for CA Client is transferred, disposed of, or taken out of service, ensure all sensitive data is securely erased.

Safety Notices

Please observe the safety notices in this manual in order to avoid danger to users or other people, and prevent damage to property.

The notices are classified as follows, according to the severity of injury or damage:

WARNING	This notice means that misuse could result in death or serious injury.

CAUTION	This notice means that misuse could result in injury or damage to property.

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Notice

The use of this Software may be limited under the terms of the licence agreement for your system. Please confirm the terms of your licence before using this Software.

Note

The contents and design of the software are subject to change without notice.
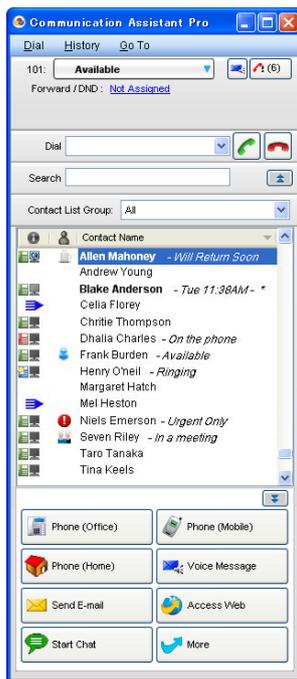
Table of Contents

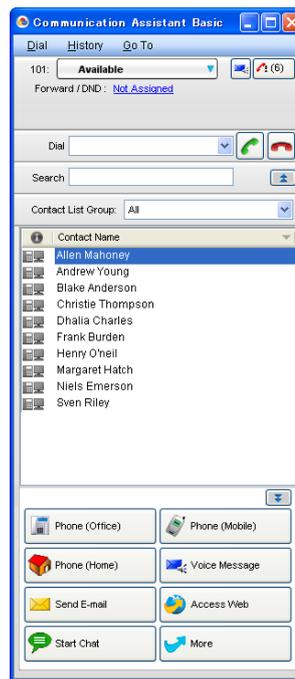# 1 Specifications

Features

Contact List with Presence

You can easily make calls using a customisable contact list that is displayed on your PC, and search for a desired contact simply and quickly. You can also see the phone status, PC status, and the absent message of other extensions from the contact list before you make a call.
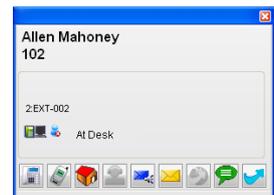
CA Client Pro Contact List   **CA Client Basic-Express Contact List**   **Presence Window**

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

  : The user is logged in.

 : The user is logged in, but the auto absent message has been set.

  : The user is not logged in.

  Presence is not displayed for users of CA Basic-Express; the contact entry must be opened to check the extension's presence.

Contact Lists with CA Server

If CA Server is installed on your network, multiple users can share common contact lists. Common contact lists can be modified using the CA Web Manager of CA Server. When CA Client users log in to CA Server, the

latest common contact lists are received from CA Server. Common contacts are displayed in your contact list enclosed by square brackets (example: "[Accounting Department]").
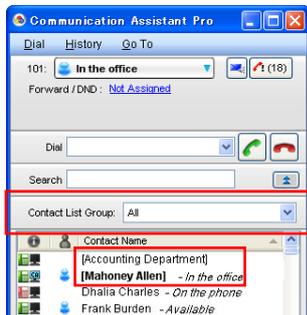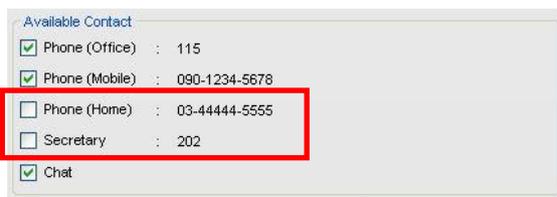

Restricting Contacts by Presence

If CA Server is installed on your network, you can restrict which of your contacts are available to be called by other CA Client users, according to your presence.

Example

In one of your presence settings, Phone (Home) and Secretary are unchecked.

When that presence is set, those contacts are made unavailable to be called by other CA Client users.
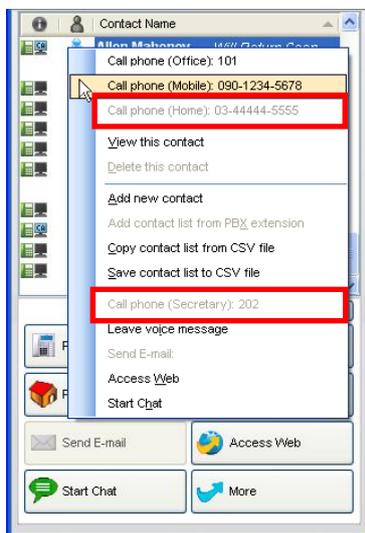

Network Features

If CA Server is installed on your network, you can make or transfer calls to users of other PBXs after confirming their presence from the contact list. You can also chat with users of other PBXs. Each computer that will use network features requires a network activation key. CA Basic-Express users cannot use network features.

CRM Integration

You can make calls directly from CRM (Customer Relationship Management) software using TAPI. CA Basic-Express users cannot use TAPI features.

You can also make calls with Microsoft® Office Outlook® 2003/2007 without using TAPI. During the installation of CA Client, if you select to add call functions to Outlook, a toolbar containing the Dial box, Answer button and Hang-up button will be added to Outlook.
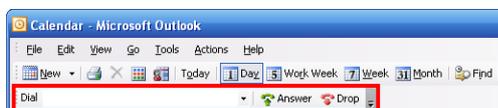
Calls can be made directly from Outlook.

Call History

You can view your incoming and outgoing call history. Information such as the destination and duration of the call, the time of the call, and whether the call was answered is displayed for each call. You can also save the history list to a CSV file.

Absent Message/Forward/Do Not Disturb

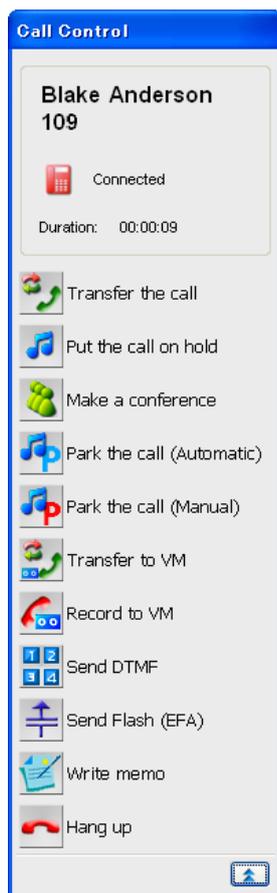You can change the absent message, forward, and do not disturb (DND) settings of your extension.

When you change your absent message, your forward/DND settings can be changed automatically, and a feature number, such as "Extension dial lock" can be dialled automatically.

Call Control

When a conversation starts, operation buttons are automatically displayed on your PC for telephone functions such as transferring a call, holding a call, and making a conference. If a called extension is busy, you can set callback ringing, send a call waiting tone, start a text chat, or leave a voice message.

During a call:

When calling a busy extension:

Call Control

Blake Anderson
109

Connected

Duration: 00:00:09

Transfer the call

Put the call on hold

Make a conference

Park the call (Automatic)

Park the call (Manual)

Transfer to VM

Record to VM

Send DTMF

Send Flash (EFA)

Write memo

Hang up

Call Control

Blake Anderson
109

On the phone

Set call back

Call waiting tone

Leave message waiting

Write memo

Hang up

IP Camera Integration (Panasonic KX-HCM/BB-HCM/BL-C series cameras)

If a Panasonic IP Camera is available on the network, you can view images or streaming video from the IP camera while talking with the other party (e.g., extension, doorphone).
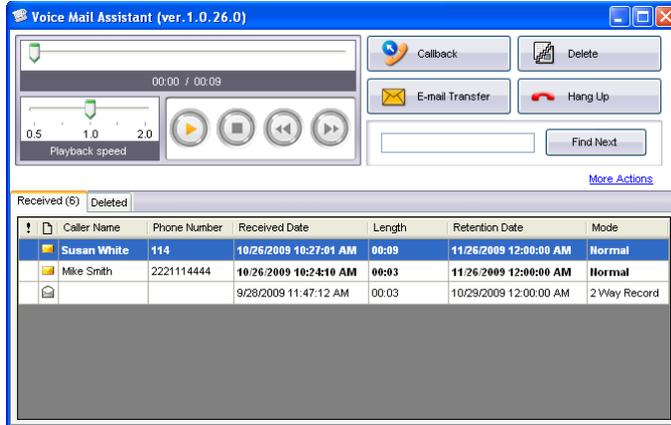
<u>**Note**</u>

This feature requires Internet Explorer® version 6.0 or higher.

## Voice Processing System (VPS) Integration

You can record conversations to voice mail automatically or manually. When a message is left on your mailbox, a message waiting indication is displayed.

Voice Mail Assistant

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

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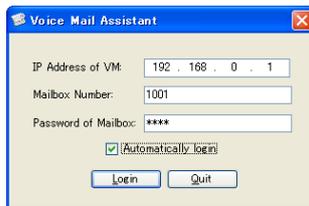
- Voice Mail Assistant uses 2 fixed ports: 20000 and 20001.
- You can customise your mailbox, such as setting the notification schedule.

Note

This feature requires KX-TVM series VPS firmware version 2.1 (main software version 2.50 or later).

IP Softphone

You can use the built-in IP Softphone. A KX-NCS32xx/KX-NCS42xx activation key must be installed in your PBX.
You can record all phone conversations to your PC if a KX-NCS81xx licence is installed in your PC.

Chat

You can start a text chat session with other CA Client users. This feature is useful for tasks such as confirming whether a colleague is available for a phone conversation. You can also set Chat call back to a user not currently logged in, and the message will appear on the user's screen when they next log on.
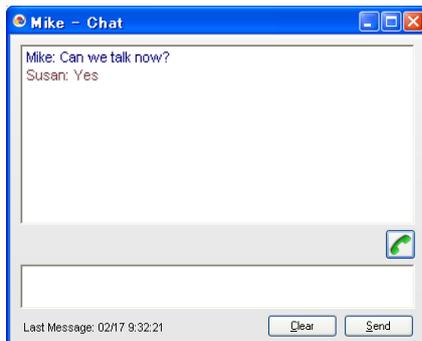
- A chat session uses 1 available port in the range 42525–42534.

Note

A network activation key is required when using this feature with users connected to other PBXs.

System Speed Dial Control

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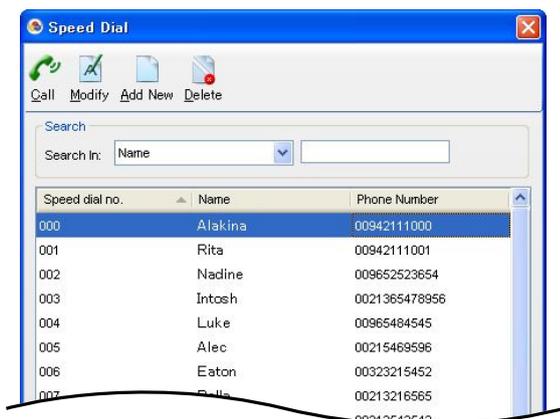
Note

When CA Server is used, you cannot add, modify, or delete entries in the Speed Dial list.

LDAP Directory Access

Users can open an LDAP window independent from the contact menu. Users can search phone numbers by name in an LDAP database. Users can select a phone number and call it, as well as send an e-mail to a contact, or add the contact to their contact list. This feature supports LDAP v3 compliant databases (e.g. Microsoft® Active Directory®).
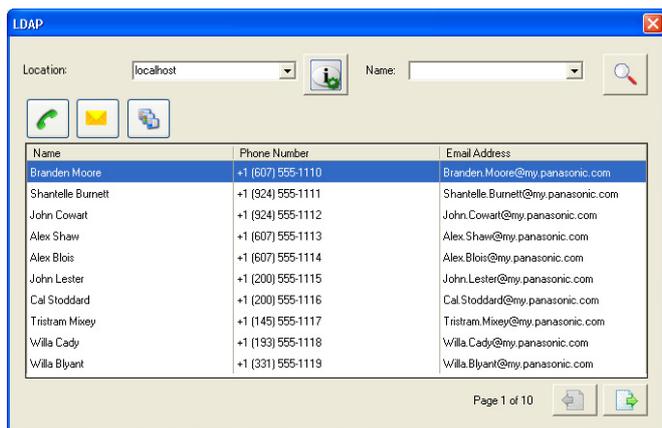
However, this feature may not work with some LDAP compliant databases, depending on the database's specifications.

Thin Client Support

CA Client can be used in a thin client environment. The supported thin client environments are Citrix XenApp™ and Microsoft Terminal Service only. CA Server and a thin client activation key (KX-NCS2010) are required to enable thin client support.

Note

> IP Softphones and 1st Party TSP features do not work in a thin client environment. During installation, users can specify the operating environment for CA Client. If a thin client environment is chosen, these two modules are not installed.

Operator Console Features

If you log in to CA Client in Operator Console mode, you can manage and redirect multiple calls simultaneously. Call parking and extension management features are available for managing a large volume of call traffic. Parked calls are put on hold and pooled into a common parking zone, and can be retrieved by any extension user.

Using Operator Console, you can also change some settings of other extensions (e.g. FWD/DND, Absent Message, extension lock/unlock, etc.).To be able to change these settings, your extension must be assigned as a manager in its Class of Service (COS) settings on the PBX.
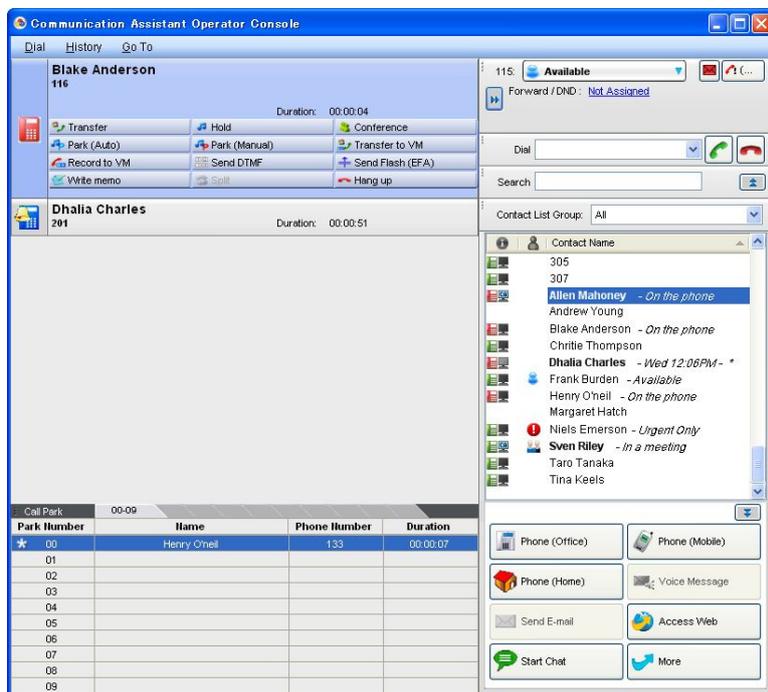
Supervisor Features

If you log in to CA Client in supervisor mode, you can monitor the status of Incoming Call Distribution (ICD) groups, listen in on conversations, take over calls, and perform other supervisory functions.

CA Supervisor Interface
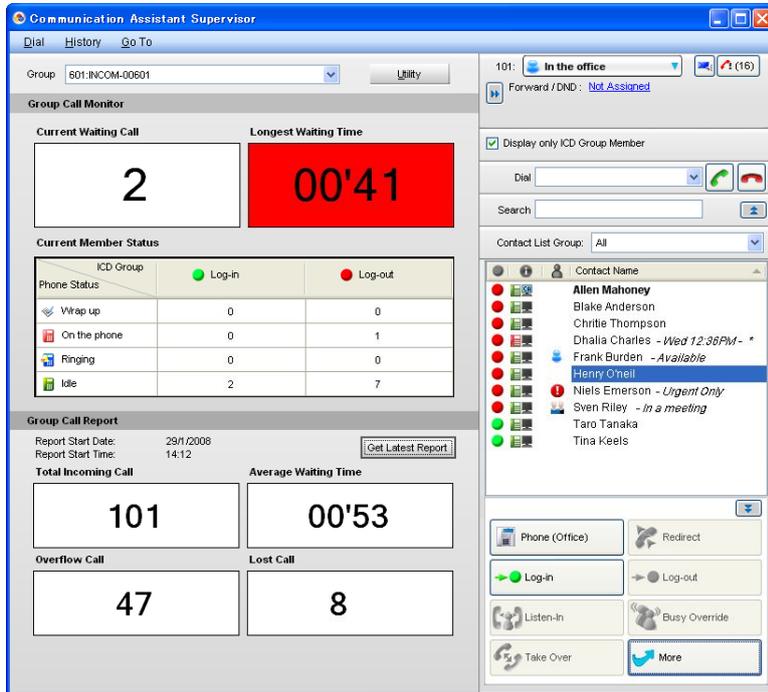
CA Supervisor Call Control

Note

- To use supervisor features when connecting to the PBX directly, your extension must be assigned as the supervisor of an ICD group in the PBX settings.
- When using CA Server, you can use supervisor features for all ICD groups if the appropriate user settings are made using CA Web Manager.
- To use the listen-in function, your extension must have "Call Monitor" enabled in its Class of Service (COS) settings on the PBX.
- To use the busy override/take over functions, your extension must have "Busy Override" enabled in its Class of Service (COS) settings on the PBX.
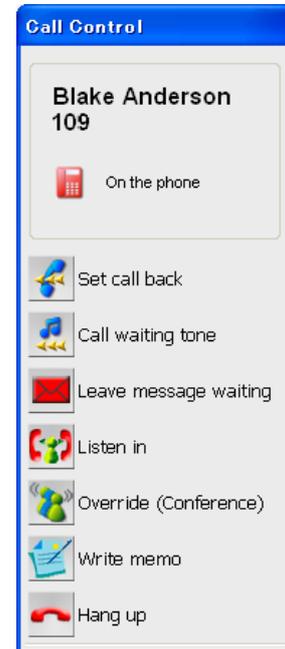
Function Key Bar

The function key bar can be accessed by choosing **Function Key** from the **Go To** menu. A bar appears with common call control function keys that always stays in front of other windows. If you drag the function key bar to the top, bottom, or sides of the screen it will 'dock' to the edge of the screen without overlapping with any other program windows.

Note

The docking feature of the Function Key Bar is not available when using a thin client.

Feature Comparison

CA Client has 4 operating modes: Basic-Express, Pro, Operator Console, and Supervisor. The following table summarises the features available for each mode.

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

Note

- A CA activation key for the desired number of users must be registered in the PBX. See **3 System Requirements** for details about the activation keys.
- You must enable CA mode for the extensions that will use CA Client in the PBX settings.

Free and Trial CA Installations

A limited number of copies of CA Basic-Express can be used on your PBX's network without activation keys. Also, a limited number of free 60-day trials are available for CA Pro. During the trial period, all the features of CA Pro are usable without installing an activation key. The 60-day trial period begins once you have installed CA Client on a PC.

The following chart details the number of CA Basic-Express and trials available according to your PBX:

PBX Model	Number of free CA Basic-Express Users	Total number of CA Pro 60-day trials
KX-NCP500/KX-NCP1000	5	2[1]
KX-TDE100/KX-TDE200	10	4
KX-TDE600	20	8

[1]   CA Pro 60-day trials for KX-NCP series PBXs include IP softphone functionality for the duration of the trial, but only if CA Server is not installed on the PBXs network.

Login Capabilities

The total allowed number of simultaneous CA Client users is determined by the type of CA Client used and whether or not a CA Server is installed on your network.

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

Login Mode	No. of Users PBX Only (Up to 128 total users)	No. of Users with CA Server (Up to 256 total users)
CA Basic-Express		256
CA Pro	128	256
CA Pro trial		256
CA Operator Console		128
CA Supervisor	4	128

Dial Modification

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

Note

- These dial modification settings can only be made through CA Client when accessing the PBX directly. If CA Server is used, settings must be made through the CA Server Web Manager.

Example

Copy a telephone number from another application.
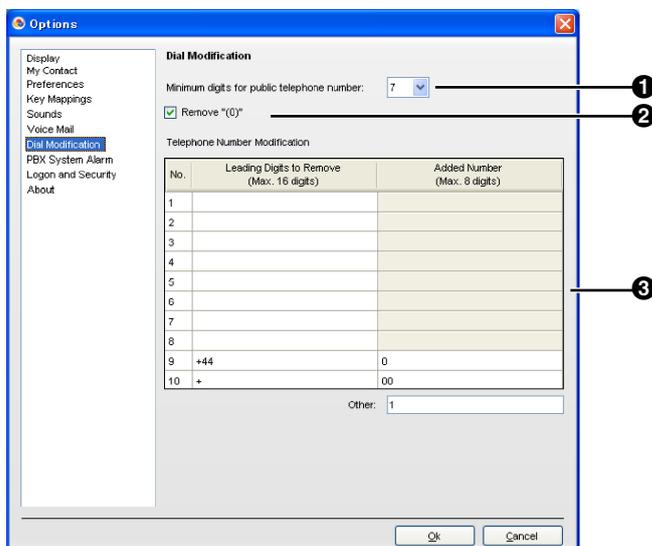

Paste the number into CA Client's dial box by pressing CTRL+V.
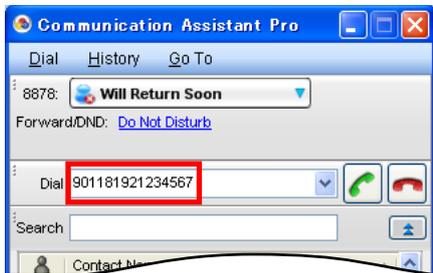
When pasted, the telephone number is modified automatically, as programmed by the user.

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

❶ **Minimum digits for public telephone number**
Specifies the minimum number of digits required to treat the dialled number as an external telephone number. If the number of digits dialled is less than the specified value, it will not be treated as an external call. The default value is 7. For example, a number is treated as below by default.
1234567 = 7 digits → External telephone number
123456 = 6 digits → Not an external telephone number

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

❸ **Telephone Number Modification**
A dialled number is modified according to the Telephone Number Modification table.
[Example]

Dial Modification Settings

No.	Leading Digits to Remove (Max. 16 digits)	Added Number (Max. 8 digits)
1	+8192	
2	+81	0
3	+	001
4	092	

Modifications

Dialled Number	Corresponding Table No.	Removed Digits	Added Digits	Modified Number
+81-92-123-4567	1	+8192	—	123-4567
+81-3-111-4444	2	+81	0	03-111-4444
+44-66-111-4444	3	+	001	001-44-66-111-4444

Dialled Number	Corresponding Table No.	Removed Digits	Added Digits	Modified Number
092-111-8888	4	092	—	111-8888

2. Configure **Minimum digits for public telephone number**, **Remove "(0)"**, and the **Telephone Number Modification** table as desired.
3. Click **OK**.

Conditions

- The following table shows which kinds of telephones can be used with CA Client:

Telephone Type	Use with CA Client
Digital Proprietary Telephone (DPT)	✓
Analogue Proprietary Telephone (APT)	✓
IP Proprietary Telephone (IP-PT)	✓
IP Softphone	✓
Portable Station (PS)	✓
Single Line Telephone (SLT)	✓
SIP Extension	

- If you log in to CA Client using an SLT extension, you cannot use the answer call, hold retrieve, busy override, listen in, TRS change, or call waiting functions in CA Client.
- Some call functions may not be available when CA Client is used with a PS. Your PBX's MPR Software File Version also determines the availability of certain call functions when using CA Client with a PS. The chart below details which CA call functions are available for PSs.

CA Call Function Compatibility Chart for PSs

Call Function in CA Client	PBX Series and Required MPR Software File Version	
	KX-NCP: 1.0xxx KX-TDE: 2.0xxx	KX-NCP: 2.0000 or later KX-TDE: 3.0000 or later
Make call	No	Yes[1]
View and change FWD/DND	Yes	Yes
View and change absent message	Yes	Yes
Message Waiting indicator	Yes	Yes
Message Waiting callback	No	Yes[1]
Transfer	No	Yes
Call Splitting	No	Yes
Call Hold	No	Yes
Establish Conference	No	Yes
Call Park/Park retrieve	No	Yes

Call Function in CA Client	PBX Series and Required MPR Software File Version	
	KX-NCP: 1.0xxx KX-TDE: 2.0xxx	KX-NCP: 2.0000 or later KX-TDE: 3.0000 or later
VM Transfer	No	Yes
Record to VM	No	Yes
Send DTMF	No	Yes
External Feature Access (EFA)	No	Yes
Account Code Entry	No	Yes[*1]
Incoming call pop-up	Yes	Yes
Answer by clicking incoming call pop-up	No	No
Redirect incoming call (Call Deflection)	Yes	Yes
Call Pickup	No	Yes[*1]
Callback Busy	No	Yes
Call Waiting	No	Yes
Leave Message Waiting	No	Yes[*1]
Open door	No	Yes[*1]
Listen In (CA Supervisor)	No	No
Busy Override (CA Supervisor)	No	No
Take Over (CA Supervisor)	No	No

[*1]   When callback ringing is used with this feature, the call must be manually answered using the PS.

- The following are not supported in CA Client:
  – Call handling with a PS in Wireless XDP Parallel mode
  – Calls using the PDN/SDN button
  – Voice Mail Assistant for Centralised Voice Mail
- When logging in to CA Client, if you enter the wrong password for a given extension number a pre-programmed number of times, the CA Client password will be locked.
  To clear the password lock:
  - For PBXs without CA Server, the extension PIN lock needs to be cleared. Clear the extension's PIN lock using PT Manager programming. When the PIN lock is cleared, the CA Client password and CA password lock are also cleared.
  - For PBXs with CA Server, the password lock must be cleared by using CA Web Manager. For details, see the CA Server Quick Reference Guide.
- The VM menu feature for a display PT should be disabled in the Class of Service (COS) settings on the Voice Processing System (VPS). If it is not disabled, you cannot record a VM greeting message in CA Client.
- If the PBX settings are changed, you must restart CA Client in order for the changes to be reflected in CA Client.
- If CA Server is installed, and settings are changed using CA Web Manager, you must restart CA Client in order for the changes to be reflected in CA Client.
- Calls that you make or receive from your extension when you are not logged in to CA Client are not recorded in the call history.
- **CRM Integration**

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

- CA Client does not support calling restrictions between PBX tenants. The presence for other tenant's extensions are displayed in CA Client.
- **Using CA Supervisor with CA Server**
  To use CA Supervisor with CA Server, the following PBX MPR Software File Versions are required:
  KX-NCP Series PBXs: PBMPR Software File Version 2.0200 or later
  KX-TDE Series PBXs: PMMPR/PGMPR Software File Version 3.0000 or later

2 System Connection Diagram

The figure below illustrates an example network setup using CA Client.

LAN/Internet

Other Connections

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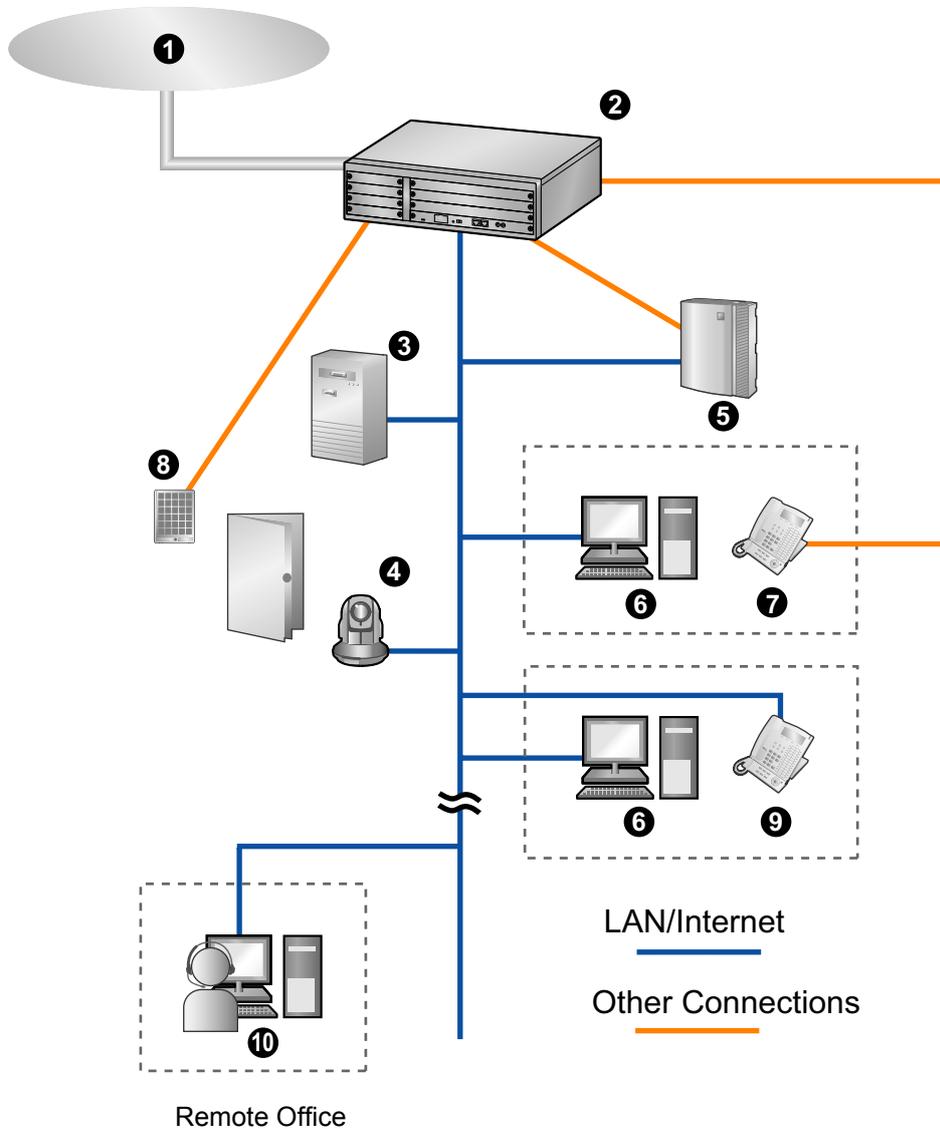
❶ Telephone Company
❷ Panasonic PBX
❸ CA Server
❹ Panasonic Network Camera
❺ Voice Processing System
❻ PC running CA Client
❼ Proprietary Telephone or Single Line Telephone
❽ Doorphone and Door Opener
❾ IP Proprietary Telephone
❿ PC running CA Client with Softphone

3   System Requirements

The tables below summarise the requirements for running CA Client.

PC

When CA Client is connected to your PBX directly, the number of contacts that can be displayed in the contact list depends on your computer's specifications. When CA Server is used, the number of contacts is not limited by your PC's specifications.

CPU	Memory	Number of Contacts in Contact List	
		Direct PBX Connection	CA Server Connection
1.0 GHz Intel® Pentium®/Celeron® processor or comparable CPU	512 MB	32	1024
2.0 GHz Intel Pentium/Celeron processor or comparable CPU	1 GB	128	1024
2.6 GHz Intel Pentium/Celeron processor or comparable CPU	1 GB	256	1024
2.6 GHz Intel Core™2 Duo processor or comparable CPU	1 GB	1024	1024

Note

The above specifications are approximations and may vary according to your computer's status, network conditions, other programs running, etc.

Other specifications are as follows:

	Minimum	Recommended
OS[*1]	Microsoft Windows® XP Professional Service Pack 2 or later Windows Vista® Business Windows 7 Professional	Microsoft Windows XP Professional Service Pack 2 or later Windows Vista Business Windows 7 Professional
Hard Disk	1.5 GB available space	2.0 GB available space
Video Resolution	1024 × 768	1280 × 1024
Interface	10Base-T	10/100Base-T

[*1]   64-bit operating systems are not supported.

For thin client environments, the following two platforms are supported:
- Microsoft Terminal Service on Windows Server® 2003 and Windows Server 2008
- Citrix XenApp on Windows Server 2003 (Client computer must fulfill the system requirements for Citrix XenApp).

PBX

To use CA Client with your PBX, CA Server may need to be installed. Confirm your PBX matches the requirements listed below. In cases where CA Server is not required, CA Server can still be used on your network to enhance the features of CA Client.

Note

KX-TDE600 users are strongly recommended to use CA Server with CA Client.

PBX Model	Required Software File Version	CA Server Required?
KX-NCP500/KX-NCP1000	PBMPR Software File Version 1.0000 or later[*1]	No
KX-TDE100/KX-TDE200	PMMPR Software File Version 2.0100 or later[*2]	Yes[*3]
KX-TDE600	PGMPR Software File Version 2.0000 or later[*2]	

[*1] For PBMPR Software File Versions before 2.0000, the PBX's Activation Key for Software Upgrade to Enhanced Version (KX-NCS3910) is also required. When using these versions, without the activation key, calls put on hold to transfer cannot be retrieved. For PBMPR Software File Version 2.0000 or later, the activation key is not required.

[*2] The PBX's Activation Key for Software Upgrade to Enhanced Version (KX-NCS4910/KX-NCS4950) is also required. Without the activation key, calls put on hold to transfer cannot be retrieved.

[*3] For PMMPR/PGMPR Software File Version 3.0000 or later, CA Server is not required.

Activation Keys

Activation Keys are files that need to be registered to your PBX to use CA Client. Different operating modes of CA Client require different activation keys. For information on how to install activation keys on to your PBX, refer to your PBX's Installation Manual.
The following activation keys are available for use with CA Client:

Model No.	Activation Key Type	Description
KX-NCS2101	CA Basic-Express 1user	Allows the use of CA Client Basic-Express for 1 user.
KX-NCS2105	CA Basic-Express 5users	Allows the use of CA Client Basic-Express for 5 users.
KX-NCS2110	CA Basic-Express 10users	Allows the use of CA Client Basic-Express for 10 users.
KX-NCS2140	CA Basic-Express 40users	Allows the use of CA Client Basic-Express for 40 users.
KX-NCS2149	CA Basic-Express 128users	Allows the use of CA Client Basic-Express for 128 users.
KX-NCS2201	CA Pro 1user	Allows the use of CA Client Pro for 1 user.
KX-NCS2205	CA Pro 5users	Allows the use of CA Client Pro for 5 users.
KX-NCS2210	CA Pro 10users	Allows the use of CA Client Pro for 10 users.
KX-NCS2240	CA Pro 40users	Allows the use of CA Client Pro for 40 users.
KX-NCS2249	CA Pro 128users	Allows the use of CA Client Pro for 128 users.
KX-NCS2301	CA Supervisor 1user	Allows the use of CA Client Supervisor for 1 user.
KX-NCS2401	CA Console 1user	Allows the use of CA Client Operator Console for 1 user.

CAUTION

The activation key file can only be installed in the PBX with the MPR ID number entered when the activation key file was downloaded. The activation key file cannot be reissued unless the MPR card crashes.

4 Software Installation

4.1 Installing and Starting CA Client

<u>**Note**</u>

When you start CA Client, make sure you are logged in to an account that has administrator privileges.

1. Double-click "Setup.msi", and follow the on-screen guidance to install CA Client.


System Environment

In this step, select whether you will be using CA Client in a thin client environment:
- **Non-thin Client Environment**: Use CA Client as a regular program installation.
- **Thin Client Environment**: Use CA Client in a thin client environment.

CRM Integration

In this step, you can choose to add a CA Client toolbar to Microsoft Outlook.

2. When you start CA Client for the first time, the screen below is displayed.
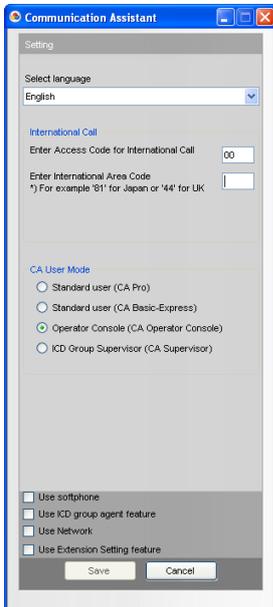
Select the display language, and enter your international call access number and international area code. **You must enter your international area code in order to proceed.**

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

- Operator Console (CA Operator): Log in using Operator Console mode.
- ICD Group Supervisor (CA Supervisor): Log in using Supervisor mode.

Note

See Feature Comparison (Page 12) for a summary of the different modes.

3. Click **Save**.

4. Enter the IP address of the CA Server you are connecting to. If connecting directly to a PBX, enter the IP address of the PBX instead. Then, enter your extension number and password.
If this is the first time you are logging in for the extension, leave the password blank.

5. If you are allowed to log in with a blank password, a dialogue box is displayed prompting you to create a password. Enter a password in **New Password**, re-enter it in **Verify Password**, and click **OK**.
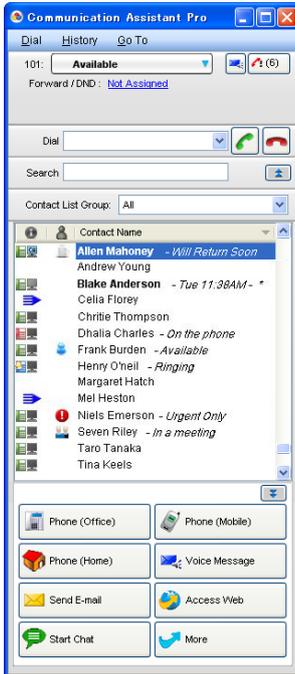

IMPORTANT

In order to prevent unauthorised access to your CA Client account, enter a password that is at least 5 characters long, and contains a combination of letters and numbers.

After you have entered a new password, the CA Client main screen is displayed.

Notice

If CA Server has been installed on your network, before changing CA Client from a PBX connection to a CA Server connection, it is recommended to uninstall CA Client, then reinstall it. If this procedure is not done, all of your contacts will be moved to the 'Business' contact list group.

4.2 Uninstalling CA Client

To uninstall CA Client, perform one of the following procedures:

- From the **Start** menu, point to **All Programs** → **Panasonic** → **Communication Assistant**, and select **Uninstall**.
- From the Control Panel, double-click **Add or Remove Programs**, select **Communication Assistant**, and then click **Remove**.