Boss-Secretary

OPERATIONAL DIRECTIONS

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1 GENERAL

1.1 GENERAL

The purpose of the feature Boss-secretary is to allow the boss and the secretaries to control the diversion of incoming calls for the boss telephone.

Both the boss and the secretaries can activate the function by pressing a previously defined PEN key. When the service is active, the PEN key LED will be changed at both the boss and secretary telephones in line with the parameter settings done by the system administrator, no matter from where the function was activated. While the function is active, all the calls to the boss will be deflected to the secretary telephone as per the priority choice given.

To deactivate the function, the same key has to be pressed in either the boss or secretary DTS or IP telephone. In this case, the PEN key LED will be changed at both the boss and secretary telephones in line with the parameter settings done by the system administrator, no matter from where the function was deactivated. The user can also deactivate the Boss-secretary feature by activating another personal number call list.

A boss can be served by more than one secretary. All the secretaries serving the same boss will be initiated as answering positions in the boss active Personal Number list. Note that boss and secretary telephones must both be DTS or both IP telephones. It is not allowed to mix the types.

When the Boss-secretary function is active, all the incoming calls to the boss telephone will be deflected to the secretary telephone initiated as the first answering position in the active Personal Number list. In case of no answer, the call will be deflected to the second answering position and so on. If the first secretary is busy, the call will not be deflected to the second secretary telephone. To avoid this problem, the parameter *--busy-position* must be set while initiating answering positions using the command *call_list -i*. It is recommended to initiate both boss and secretary telephones in the same Server. The call received by a secretary can be transferred back to the boss without deactivating the Boss-secretary feature.

A secretary can control the incoming calls for more than one boss. In this case, the DTS or IP secretary will need a PEN key for each boss.

In case of generic extensions, there is no special Boss-Secretary category or class of service. An extension initiated with Personal Number will act as Boss terminal, and an answer position with IRD bypass category (set with the *--ird-bypass* parameter in the *call_list* command) will act as secretary terminal.

When deactivating the boss-secretary service, a fallback passive PN list can be defined and used to re-direct calls to alternative destinations.

For IP phones the choice of active/passive call list is up to the administrator. Active list and passive list described above can be 1 to 5 for active and 0 to 5 for passive. The *--key-on-call-list* and *--key-off-call-list* parameter settings will determine the behavior of the led indication when a certain list is active. I.E. led set to on for both the Boss and the Secretary terminal when the service is active or the led could indicate the terminal that got the active call list

For DTS phones the active list is list 1 and the passive list is list 2.

1.2 ABBREVIATIONS

For a complete list of abbreviations and glossary, see the description for *ACRONYMS, ABREVIATIONS AND GLOSSARY*.

2 PREREQUISITES

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3 AIDS

I/O terminal

4 REFERENCES

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5 PROCEDURE

5.1 GENERIC EXTENSION

The following steps must be followed to set up the system for activating the Boss-secretary service for the generic extensions (here IP extensions, active list is list 1, passive list is list 2):

- Initiate personal number list 1 for the boss telephone, and set an ird-bypass category for the secretary telephone.

- Initiate list 2 for the boss telephone.

- Initiate PEN key for boss and secretary extensions to monitor list 1 as active and list 2 as passive.

For example:

*call_list -i --dir 2233 --list 1 --position 1 --dest-number 2246 \
--ird-bypass 1*

call_list -i --dir 2233 --list 2 --position 1 --dest-number 09

*extension_key -i -d 2246 --key 12 --function PEN \
--monitored-dir 2233* --key-on-call-list 1 --key-off-call-list 2

Here 2233 is the boss telephone and 2246 is the secretary telephone, which has an ird-bypass category.

For more information on call list, refer to the operational directions for Personal Number.

5.2 DIGITAL TELEPHONE SET

The following steps must be followed to set up the system for activating the Boss-secretary service for DTS:

1. Initiate the Boss-secretary category for the DTS telephone as boss. The secretary can be an ATS, DTS, IPeX, CXN or RXN.

2. Initiate the personal number list 1 for the boss telephone.

3. Initiate the PEN keys needed for this service in the telephones for both the boss and secretaries (in case of DTS).

4. Activate the service by pressing the initiated PEN key at either the boss telephone or any of the secretaries' (in case of DTS) telephones.

6 EXECUTION

6.1 INITIATE OR CHANGE BOSS-SECRETARY CATEGORY

6.1.1 INITIATE OR CHANGE SECRETARY CATEGORY FOR GENERIC EXTENSION

General

The category must be initiated or changed for secretary telephones. If the boss telephone is an IP terminal, the secretary telephone(s) must also be generic.

For secretary telephone, the *--secretary* category is 1 (yes).

Prerequisites

Appropriate service profile for secretary shall have been defined with the command *extension_profile.*

Execution

To initiate the extension directory number 2244 with category as secretary.

Use the command *extension -i* with a *--csp* for secretary.

To change the category of a generic extension 1133 to secretary.

Use the command *extension -c* with a *--csp* for secretary.

Execution

Initiate or change the secretary category

	Measure/Question	Observation/Comment
1	Key the command *extension -i* to initiate a new extension. Use a service profile where --secretary 1 (yes).	See the command description for *Extension*

or, for change:

	Measure/Question	Observation/Comment
1	Key the command *extension -c* to change the --secretary category for an existing extension. For the extension command use --secretary 1 (yes).	See the command description for *Extension*. It is not possible to change the parameter value when Boss-secretary is active.
2	Key the command *extension -p* to verify that the initiation or change has been executed.	See the command description for *Extension*.

6.1.2 INITIATE OR CHANGE BOSS-SECRETARY CATEGORY FOR DTS

General

The category must be initiated or changed for both boss and secretary telephones, to work properly.

For the boss telephone, the Boss-secretary category is 2. For secretary telephone, the Boss-secretary category is 1.

Prerequisites

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Example

To initiate the DTS extension 2244 with Boss-secretary category as secretary:

KSEXI:DIR=2244,EQU=1A-0-50-1,CAT=1,ITYPE=20,BSEC=1;

To change the category of a DTS terminal 2233 to boss.

KSCAC:DIR=2233,BSEC=2;

To change the category of an ATS terminal 1133 to secretary.

EXCAC:DIR=1133,BSEC=1;

Execution

Initiate or change the boss category

	Measure/Question	Observation/Comment
1	Key the command *KSEXI* to initiate a new DTS extension with the BSEC parameter value 2	See command description for *DIGITAL KEY SYSTEM TELEPHONE, KS.*

or, for change:

	Measure/Question	Observation/Comment
1	Key the command *KSCAC* to change the BSEC category of an existing DTS extension with the BSEC parameter value 1	See command description for *DIGITAL KEY SYSTEM TELEPHONE, KS.*
2	Key the command *KSCAP* to verify that the initiation or change has been executed.	See the command description for *DIGITAL KEY SYSTEM TELEPHONE, KS*

6.2 INITIATE ACTIVE PN LIST

General

A active personal number list must be initiated on the boss extension.

The answering positions in active PN list with Boss-secretary category (=1), for DTS phones, or *--secretary* =1 (yes) for generic extensions, are considered as secretaries.

Prerequisites

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Example

Initiate 2244, 2245, 2246 as secretaries for boss 2233.

call_list -i --dir 2233 --list 1 --position 1 --busy-position 2 --dest-number 2244

call_list -i --dir 2233 --list 1 --position 2 --busy-position 3 --dest-number 2245

call_list -i --dir 2233 --list 1 --position 3 --dest-number 2246

To print the secretaries for 2233.

call_list -p -d 2233

Execution

Initiate active PN list for the boss

	Measure/Question	Observation/Comment
1	Key the command *call_list -i* to initiate one secretary for boss active PN list.	See the command description for *Call List*
2	Are more secretaries to be initiated for the boss? (maximum 10)	If yes, repeat the call_list command.
3	Key the command *call_list -p* to verify that the initiation has been executed.	See the command description for *Call List*

6.3 INITIATE PASSIVE PN LIST

General

When the boss-secretary feature is deactivated, i.e. when PN is deactivated for the boss, calls to the boss would ring on the boss telephone directly. If it is instead wanted to re-direct the incoming calls to a fall-back destination (or destinations), a passive personal number list can be initiated for the boss extension. The passive PN list will be used as default list, if initiated.

Prerequisites

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Example

Initiate fallback destinations which is a public subscriber number 89922400, and 2200 which is the voice mailbox for boss 2233.

call_list -i --dir 2233 --list 2--position 1 --busy-position 2 --dest-number 89922400

call_list -i --dir 2233 --list 2--position 2--dest-number 2200

To print the PN data for 2233.

call_list -p -d 2233

Execution

Initiate passive PN list for the boss

	Measure/Question	Observation/Comment
1	Key the command *call_list -i* to initiate one destination entry for boss passive PN list.	See the command description for *Call List*
2	Are more alternative destinations to be initiated for the boss? (maximum 10)	If yes, repeat the call_list command.
3	Key the command *call_list -p* to verify that the initiation has been executed.	See the command description for *Call List*

6.4 INITIATE PEN KEYS

6.4.1 INITIATE PEN KEYS ON IP EXTENSION

General

The PEN keys on both boss and secretary telephones must be set.

For the secretary telephones, the PEN key and the key on/off call list values must be set with a value of the corresponding boss directory number and call list values.

Prerequisites

The telephone should have a *--secretary* category value as 1 (yes, secretary).

Example

When a boss 2233 has the secretaries 2244 and 2245.

extension_key -i -d 2233 --key 18 --function PEN --key-on-call-list 2 --key-off-call-list 3

extension_key -i -d 2244 --key 18 --function PEN --monitored-dir 2233 --key-on-call-list 2 --key-off-call-list 3

extension_key -i -d 2245 --key 18 --function PEN --monitored-dir 2233 --key-on-call-list 2 --key-off-call-list 3

To print the initiated values.

extension_key -p -d 2233

extension_key -p -d 2244,2245

Execution

Initiate the boss PEN key

	Measure/Question	Observation/Comment
1	Key the command *extension_key -i* to make the function key a PEN key.	See the command description for *Extension.*
2	Key the command extension_key -p to verify that the initiation has been executed.	See the command description for *Extension.*

Initiate secretary keys

	Measure/Question	Observation/Comment
1	Key the command *extension_key -i* to initiate the function key to PEN and the --monitored-dir value to the corresponding boss number.	See the command description for *Extension.*
2	Is the secretary going to serve several bosses?	If yes, repeat the extension_key command.
3	Key command *extension_key -p* to verify that the initiation has been executed.	See the command description for *Extension.*

6.4.2 INITIATE PEN KEYS FOR DTS

General

The PEN keys on both boss and secretary telephones must be set.

For the boss telephone, the PEN key must be set with value 1 (PN list 1).

For the DTS secretary telephones, the PEN key must be set with a value of the corresponding boss directory number.

Prerequisites

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Example

When a boss 2233 has the secretaries 2244 and 2245.

KSFKC:DIR=2233,KEY=18,FCN=PEN,DIG=1;

KSFKC:DIR=2244,KEY=18,FCN=PEN,DIG=2233;

KSFKC:DIR=2245,KEY=18,FCN=PEN,DIG=2233;

To print the initiated values.

KSFKP:DIR=;

Execution

Initiate the boss PEN key

	Measure/Question	Observation/Comment
1	Key the command *KSFKC* to change the function key to PEN and the DIG value to 1.	See the command description for *DIGITAL KEY SYSTEM TELEPHONE, KS*
2	Key the command *KSFKP* to verify that the initiation has been executed.	See the command description for *DIGITAL KEY SYSTEM TELEPHONE, KS*

Initiate secretary keys

Prerequisite: the DTS telephone should have a Boss-secretary category value as 1 (secretary).

	Measure/Question	Observation/Comment
1	Key the command *KSFKC* to change the function key to PEN and the DIG value to the corresponding boss number.	See the command description for *DIGITAL KEY SYSTEM TELEPHONE, KS*
2	Is the secretary going to serve several bosses?	If yes, repeat the KSFKC command.
3	Key command *KSFKP* to verify that the initiation has been executed.	See the command description for *DIGITAL KEY SYSTEM TELEPHONE, KS*

6.5   ACTIVATE THE SERVICE

General

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Prerequisite

The sections 6.1 through 6.4 must have been executed.

Execution

	Measure/Question	**Observation/Comment**
1	Press the PEN key on the boss telephone.	
2	Press the PEN key on the secretary telephone.	
3	Observe the PEN key LED status on both the boss and secretaries telephones.	LED is turned on.

6.6   DEACTIVATE THE SERVICE

General

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Prerequisite

The sections 6.1 through 6.5 must be executed and Boss-secretary service is active.

Execution

	Measure/Question	Observation/Comment
1	Press the PEN key on the boss telephone.	
2	Press the PEN key on the secretary telephone.	
3	If passive PN list has been defined for the boss (see 6.3 above), passive PN list will be active.	Passive PN list becomes active. LED remains on.

or

	Measure/Question	Observation/Comment
1	Activate PN list by dialing a procedure, using the CSTA Set Feature, or using the Absence soft-key, or through the *call_list -c* command.	PN list activated
2	Observe the PEN key LED status on both the boss and the secretary telephones	LED is turned off

6.7 REMOVE THE PEN KEY FUNCTION

6.7.1 REMOVE THE PEN KEY FROM IP EXTENSION

General

To remove the function, it is necessary to remove the previously defined keys on both the boss and secretary telephones.

Prerequisite

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Execution

Remove the boss key

	Measure/Question	Observation/Comment
1	Key the command *extension_key -e* to remove the PEN key function on the boss IP telephone.	See the command description for Extension.
2	Key the command *extension_key -p* to verify that the removal has been executed.	See the command description for *Extension.*

Remove the secretary keys

	Measure/Question	Observation/Comment
1	Key the command *extension_key -e* to remove the PEN key function from the secretary IP terminal.	See the command description for *Extension.*
2	Key the command *extension_key -p* to verify that the removal has been executed.	See the command description for *Extension.*

Remove secretaries from the boss list

	Measure/Question	Observation/Comment
1	Key the command *call_list -e -d --list* to remove one secretary in PN list 1.	See the command description for *Call List*.
2	Is the boss going to remove more secretaries?	If yes, repeat the call_list command.
3	Key the command *call_list -p -d* to verify that the removal has been executed.	See the command description for *Call List*.

6.7.2   REMOVE THE PEN KEY FUNCTION FROM DTS

General

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Prerequisite

To remove the function, it is necessary to remove the previously defined keys on both the boss and secretary telephones.

Execution

Remove the boss key

	Measure/Question	Observation/Comment
1	Key the command *KSFKC* to change the PEN key function on the boss DTS to a TNS key.	See the command description for *DIGITAL KEY SYSTEM TELEPHONE, KS*
2	Key the command *KSFKP* to verify that the removal has been executed.	See the command description for *DIGITAL KEY SYSTEM TELEPHONE, KS*

Remove the secretary keys

	Measure/Question	Observation/Comment
1	Key the command *KSFKC* to change the PEN key function on the secretary DTS to a TNS key.	See the command description for *DIGITAL KEY SYSTEM TELEPHONE, KS*
2	Key the command *KSFKP* to verify that the removal has been executed.	See the command description for *DIGITAL KEY SYSTEM TELEPHONE, KS*

Remove secretaries from the boss list

	Measure/Question	Observation/Comment
1	Key the command *call_list -e -d --list* to remove one secretary in active PN list.	See the command description for *Call List*.
2	Is the boss going to remove more secretaries?	If yes, repeat the call_list command.
3	Key the command *call_list -p -d* to verify that the removal has been executed.	See the command description for *Call List*.

6.7.3   REMOVE SECRETARY CATEGORY FOR GENERIC EXTENSION

General

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Prerequisite

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-**Execution**

Remove secretary category

	Measure/Question	Observation/Comment
1	Key the command *extension -c* to change the *--secretary* category for an existing extension. For the extension command use *--secretary* 0 (no).	See the command description for *Extension*. It is not possible to change the parameter value when Boss-secretary is active.
2	Key the command *extension -p* to verify that the change has been executed.	See the command description for *Extension*.

7   TERMINATION

A dump on to backup media must be done due to the changes made by this function on the extension data.