

CMG Quick Reference Guide

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Quick Reference Guide – CMG Web

CMG Web has a variety of features to streamline your communication needs. The features are grouped in separate tabs; some are licensed and some are only available on certain telephony platforms (noted below).

The responsive web design allows you to resize your browser to suit your needs and gives you the freedom to use CMG Web from your device of choice (e.g. PC, mobile phone, or tablet).



Directory:

Search the corporate directory. Multiple items can be entered just like a normal search engine. The search is performed automatically across the most common data after three characters have been entered.

In the search results there are two clickable items:

- Name: to display a user's profile, in order to send SMS, e-mail, view activity details, etc.
- Phone: to call a user (click-to-dial)

Additional search options allow you to:

- Choose directories to search (defined by your administrator)
- Search for keywords ("drop-down arrow" by Search button)
- Perform an advanced search where you choose the fields to search
- Note: The number of search results displayed are based on the Maximum Search Results value set by the admin. Currently, the max value for this field is 400. For more than 400 search results you can search using Organization Tab.

Organization:

The Organization feature allows you to see the company in a graphical way with expandable and collapsible departments.

You get the same functionality as in the directory search results (click-to-dial and access profile information).

Activities:

Create single and recurring CMG activities and view activities synchronized from your calendar. Activities are displayed for today or all (defined by your administrator).

Work Group:

A Workgroups is a group of members performing the same type of job, or work in the same area of a company.

Workgroup administrator privileges and Workgroup details are updated in CMG DM by CMG DM administrator. CMG DM admin can enable or disable admin privileges for the user. One or more than one user can be assigned as Workgroup administrator.

Workgroup admin has the privilege to create, modify, or delete an activity on behalf of members who belong to the same workgroup, set schedules, specify different routing for off-hours or holidays through CMG Web.

Activity: <Select activity>

Forward to: No forwarding

From: 10/26/2017 3:31 PM

To:

☐ Until further notice

Name	Phone	
User 2	9008	<input type="checkbox"/>
User 1	9009	<input checked="" type="checkbox"/>
User 3	9007	<input type="checkbox"/>
User 4	9006	<input type="checkbox"/>

Menus

A menu is a list of options that the caller can select when calling a company employee or CMG Speech user. There are different menus like System menus, User-defined menus, and Recorded Menus. User can select any Menu and map it to the activity that they would want their caller to listen to.

Menus can be restricted in different ways. It is possible to omit the possibility of user-defined menus, or to block certain menu options so that the user cannot change them (for example if the company policy is to have 9 always leading to operator). It is also possible to lock a menu to a certain activity so that the same menu is always presented when the called party is, for example, on sick-leave.

Users can also record voice and map it to an activity for the IVR Menu presentation for callers. Only the user who creates this customized menu can edit it. For more details see, CMG Speech Configuration Manager Administrators Guide, section 2.5.5. Configuring Recorded Menus.

Forwarding:

Assign the call routing profile for incoming calls. This is particularly powerful with MX-ONE's personal number feature.

Messages: (optional)

Manage your voice mails and InConference recorded calls. The number of new messages is displayed on the tab in real-time.




Listen to your messages directly from the browser; just select the message and play. Messages listened to but not saved are deleted by the system periodically as defined by the system administrator. You can also retrieve your accidentally deleted messages.

Visitors: (optional)

Pre-register your expected visitors so when they arrive at the office they simply check themselves in at the reception. You will be notified based on your preference and what has been defined by your administrator.

Your current list of visitors is also presented on this tab with their current status. There is also an option to view your history of previous visitors.

Visitor Status Icons:

	Expected		Arrived		Checked in
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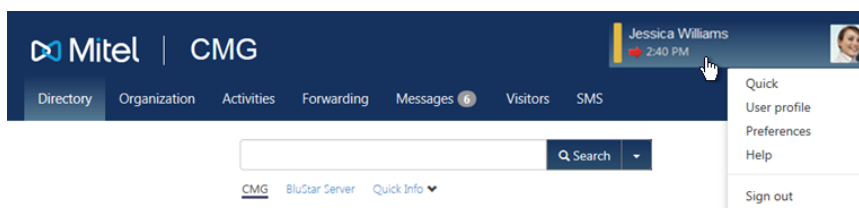
SMS:

The easiest way to send an SMS is from the directory search. Click on the person's name to bring up their profile and click the SMS link.

The text is limited to 100 characters because we add your first name and telephone number (the SMS is sent from a system number).

Self Service, configuration settings, user guide, and Quick:

For Self Service features, configuration settings, user guide, and access to Quick, left-click on your name to display a menu.



Quick:

Quickly sets your CMG activity. You can define which activities should be added to the list and each activity's duration.

You can also set your CMG user presence by selecting: 'Available', 'Busy', or 'Do not Disturb'.

Additionally, you can enter in free text to share with colleagues synchronized across CMG Web, CMG for PC, and the Attendant.

User profile:

View your personal information stored in the system. To update this information click on the 'change request' link, enter the new information, and CMG Web will send it to your system administrator for processing.








Preferences:

Preferences are grouped into four categories:

1. General:
 - a. Select language and activity view (List and Timeline – Timeline provides a graphical indication of the current time in relation to your activities)
2. Calendar:
 - a. Activate your calendar synchronization
 - b. Allow the system to forward calls during activities or select 'No forwarding'
3. Call Routing Profiles:
 - a. "Activity Routing" defines call handling per activity
 - b. "Personal Number – Forwarding Profiles"
 - For MX-ONE customers
 - Defines profiles with call routing information (e.g., which numbers to ring, how long to ring, etc)
 - Allows calls from internal, external, or attendant
4. Voice Services:
 - a. Record your personalized voice mail greetings by clicking on any phrase in the Greeting phrase area. The General greeting phrase is used for all activities that do not have a greeting phrase assigned.
 - b. Personalize menu choices so that callers are presented with options, e.g. "To record a voicemail press 2, transfer the call to the mobile phone press 4, transfer the call to an attendant press 9".
 - c. Define and assign a specific greeting phrase menu to an activity. This way a caller will be presented one menu when you are in a meeting and another when you are at lunch.
 - d. Define how you want to be notified when you receive a voice mail (message indicator on the phone, SMS, and/or e-mail). Also specify if you want an immediate notification or delay (a number of minutes or until a message threshold is reached).
 - e. Voice Services settings:
 - Grant access to Speech Attendant to search for you
 - 'Info level' controls the level of information presented to you when handling your voice mail from a phone

Presence and forwarding Indications:

The presence and call forwarding information is shown in various places of the product (your own presence and those you have searched for).

Icons	Color	Comment
	Green	Available in the presence system (i.e. CMG for PC)
	Yellow	Busy (meeting or phone call)
	Red	Unavailable, “do not disturb”
	Gray	Signed out of presence system
	Transparent	Unknown
	Red	Calls forwarded to attendant, IVR, or voice mail.
	Yellow	Calls forwarded to a user’s personal choice.

notes for mobile users:

- Creating a shortcut icon (favicon) on your device ensures CMG Web is as easily accessed as one of your favorite Apps
- The Activity page on the mobile application is equivalent to CMG Quick.
- The following functionality is not available on mobile devices:
- Organization tab
- User profile tab
- Calendar, Call Routing Profiles, and Voice Services tabs (under the Preferences tab)
- User Guide

Troubleshooting:

Deleted voice mail unintentionally: You can retrieve deleted voice mail messages from the trash. In the Messages tab, select the ‘...’ link followed by the trash folder to get access to the list of deleted messages.

Cannot listen to voice mail from Internet Explorer: Check your ‘compatibility mode’ setting. In Internet Explorer, press ‘Alt’ to display the ‘Tools’ menu, and select the ‘Compatibility View Settings’ options. Remove CMG Web from the compatibility view.

Cannot record voice mail greetings: You may not have the proper privileges to perform this function. You need to have the option to ‘click-to-dial’ set. Check with your system administrator.

Cannot see Messages or Visitors tab: You either do not have these products or do not have privileges to access to them. Check with your system administrator.

feedback:

To provide feedback on our product, please provide the following information to your system administrator:

- CMG Web version (hover over the product logo, top left)
- Operating System and browser, including their versions
- Date and time (if reporting an issue)
- Detailed description

