GlobalTalk User Guide

GlobalTalk Release 3.01

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GlobalTalk™ Audio-conferencing System

User Guide v3.01

www.globaltalk.intuitwebsites.com
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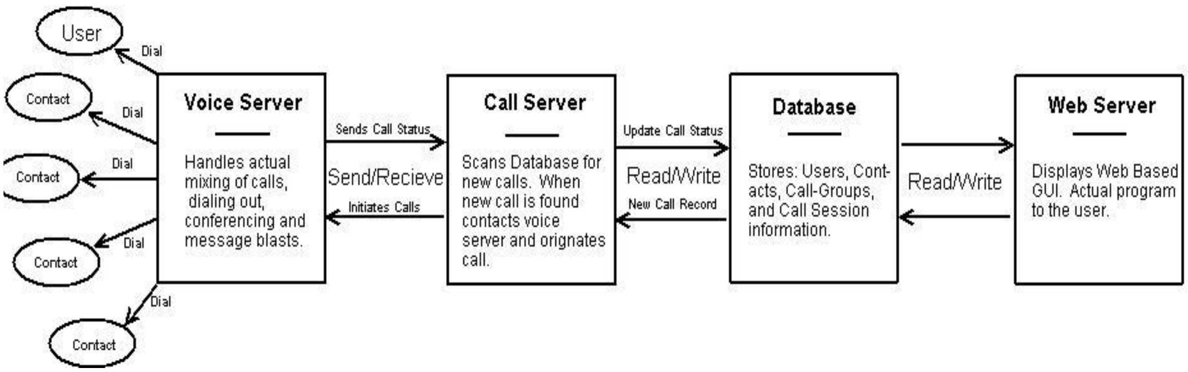
A. GlobalTalk™ Application Overview



The above diagram gives a basic layout of the GlobalTalk™ software architecture.

A1. Software Architecture

GlobalTalk™ is designed with four modules. Each module has its own specific role and each one is required in order for GlobalTalk™ to function.

When a user logs in and executes a new Call Session the Web Server adds new records in the database. The Call Server (which is monitoring the database) picks up the new call records and sends the call information to the Voice Server which in turn dials the user and the chosen contacts. The Voice Server mixes the calls and does the bulk of the call processing and in turn sends status information back to the Call Server e.g. whether a call was answered or busy, etc.

The Call Server then sends the information back to the database which is in turn scanned by the Web Server upon request from the user's browser.

A2. Login Screen

To access the Audio Conferencing system, enter http:___________on the address line in Microsoft Internet Explorer

The above screenshot displays the default login screen. All passwords are provided by the System Administrator.

To Sign On:

Type ‘Username’ in the “Username:”

Tab to next field Password:

Type ‘Password’

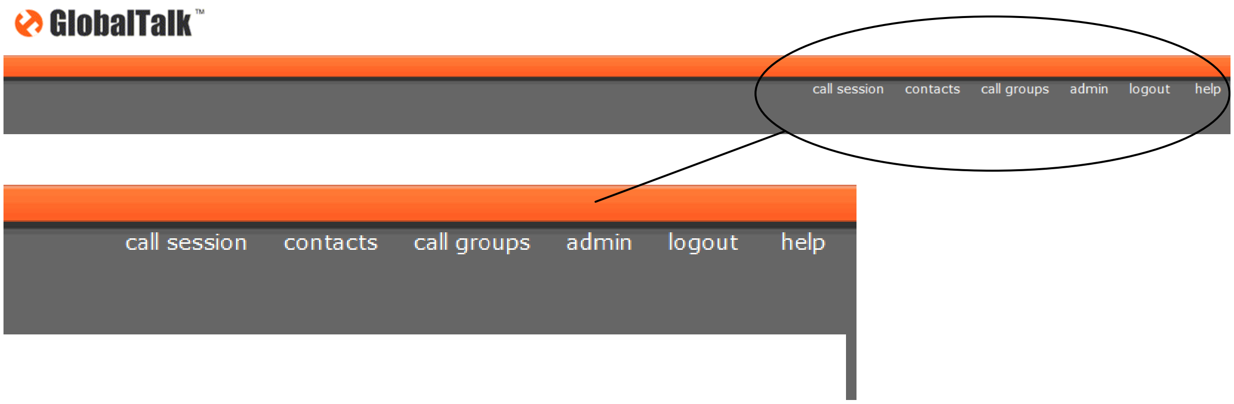
Click “login” button.

The ‘call session’ screen will display.

If the Username and Password are incorrect, red text will appear below the authentication heading stating: “Identification failed - please try again”.

Note: Username and Password are case sensitive.

A3. Menu Bar



The above screenshot displays the main menu. Each menu item is described below:

call session

The Call Session Management page is where each user chooses the Contacts or Call Groups (Group of Contacts) with whom they wish to communicate.

contacts

The Contact Management page is where users manage the global Contacts database, allowing for users to create, update, and delete Contacts.

Note: An email should be forwarded to your GolbalTalk administrator indicating changes made to the database to ensure the master list is up to date.

call groups

The Call Group Manager Page is where users can create or delete Call Groups and add or remove Contacts from the individual Call Groups.

admin

The Admin Portal shows the system status or current calls that are either active or in the process of being set up. Details specific to each call will be displayed. The Admin Portal also has links to manage Message Administration, User Administration, Internal Extensions and System Backup. For more information see the separate Admin Guide.

logout

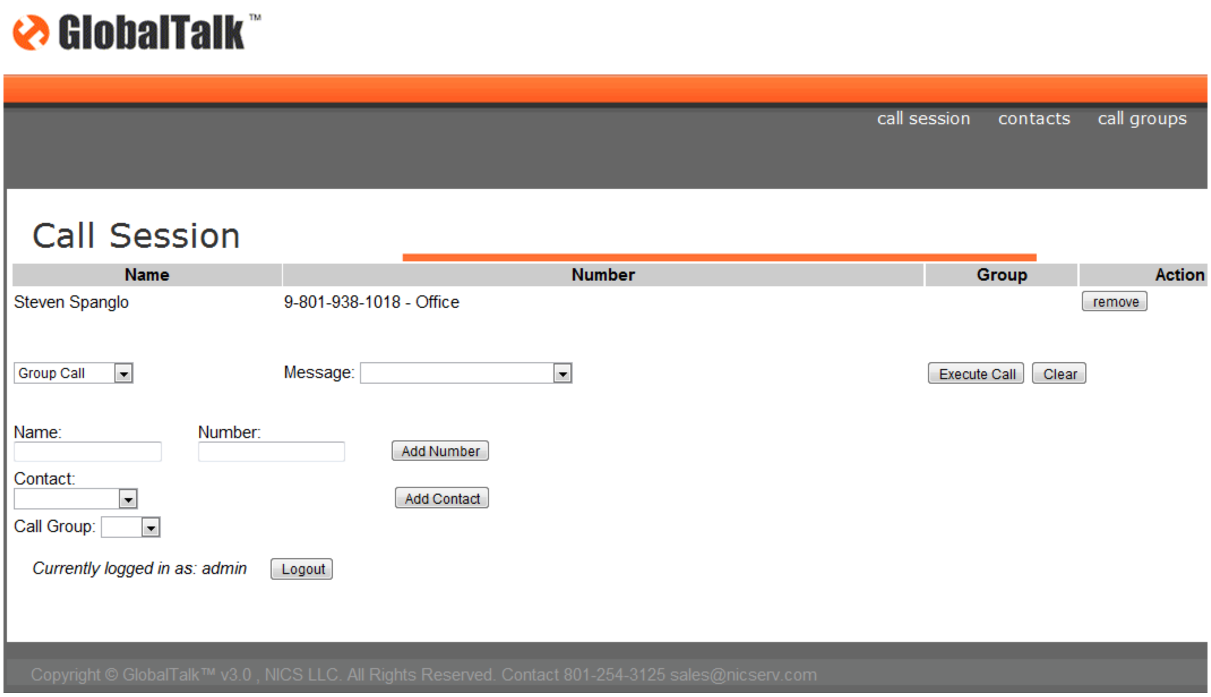
The Logout Screen will log out the user and return to the login screen.

HELP

The **Help** screen allows the user to access all **Help** documentation

B. Call Session

Sample of the Call Session screen after sign on:



The Call Session page is where the user adds Contacts or Call Groups to a Call Session.

TO MAKE A CALL:

Add a contact ad-hoc:

- Enter the name and/or number (name is not a required field) into the corresponding text boxes
- Click the “Add Number” button.

Add Contacts:

• Select the desired Contact from the “Contact” drop down list.

Note: The phone numbers will load automatically and appear to the right on the contact name; if the Contact has no phone numbers no phone numbers will be displayed.

• Select the desired Phone Number.

• Click “Add Contact” and the Contact will appear in the Call Session list above.

• Multiple contacts can be added – one contact at a time

Add Call Group:

• Select the desired Call Group from the “Call Group” drop down list. All the Contacts in that Call Group will be listed.

• If you wish all the Contacts in that Call Group to be included in the Call Session then click the “Add Contacts to Call” button.

OR

• If you do not wish a certain Contact(s) within that Call Group to be called then un-tick the “Add” button for that Contact, and then click the “Add Contacts to Call” button.

Only the “ticked” Contacts in that Call Group will appear in the Call Session list

• Multiple groups can be added – one group at a time

Call Type:

- Upon adding a Contact to the Call Session, two new fields – Group Call and Message will appear directly below the contacts you have added.

- If you select Group Call and a Message, a conference call will be initiated when the “Execute Call” is clicked. If a conference introduction is not required, use the default blank message. If a conference introduction is required, select from the message drop down

- If you change Group Call drop down to Message Blast, you must choose a message from the Message drop down. When you “Execute Call” a blast out message will be sent to each of the contacts (and well as the user’s phone) and will be repeated 3 times. Once the blast out message is delivered, the call will end for all parties.

Action:

- The action column will allow you to manage the call by removing contacts from a call, hanging up calls in progress or retrying a number. Simply click on the appropriate button (“remove”, “Hang Up” or “Retry” opposite the contact.
- See further details under ‘*Call Status Dashboard’ following this section*

Clear:

• To refresh the screen and return to a blank Call Session screen, click “Clear”. All contacts will be cleared from the screen.

Execute Call

• Once you have added all contacts and groups required, click “Execute Call”.

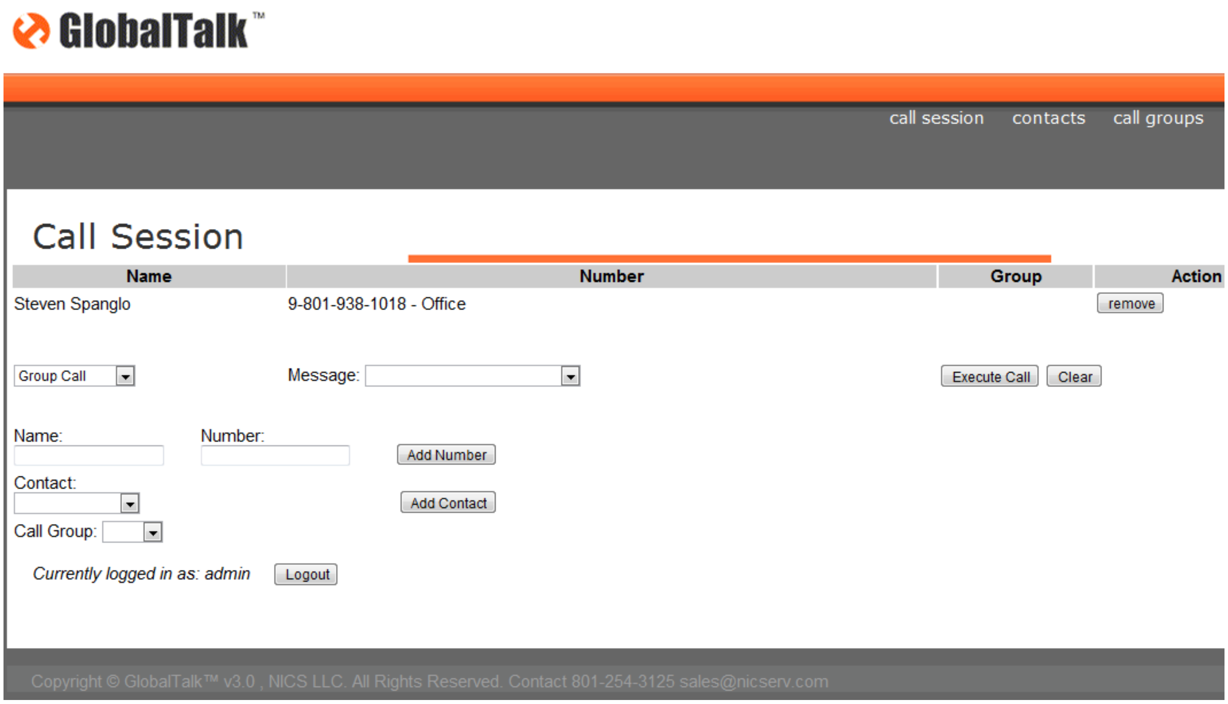
• Your direct phone will be added automatically and your extension will ring. Picking up your extension will add you in to the conference and begin the official recording of the conference call.

• The status column will show the status of the call to each contact. Refer to the ‘*Call Status Dashboard’ or ‘Action’ above to make changes once call is underway.*

End Call

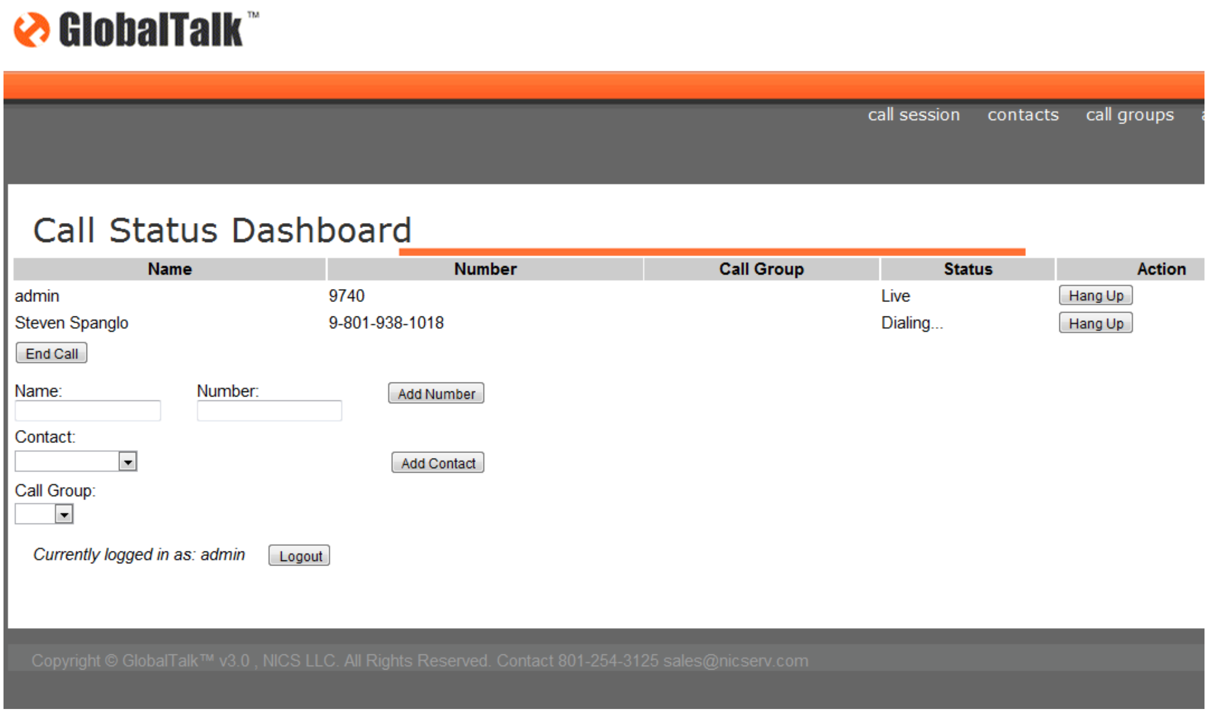
• Once the call is complete, click the “End Call” button. This will clear both the screen in preparation for a new call session as well as clear the Admin Portal.

Sample of Call Session


GlobalTalk™
call session
contacts
call groups
Call Session
Name
Number
Group
Action
Steven Spanglo
9-801-938-1018 - Office
remove
Group Call
Message:
Execute Call
Clear
Name:
Number:
Add Number
Contact:
Add Contact
Call Group:
Currently logged in as: admin
Logout
Copyright © GlobalTalk™ v3.0 , NICS LLC. All Rights Reserved. Contact 801-254-3125 sales@nicserv.com

B1. Call Status Dashboard

Once the “Execute Call” button has been clicked and the call is underway, the “CallSession” screen becomes the “Call Status Dashboard” screen.



The Call Status Dashboard screen allows you to view the status of the call in real time and “Hang Up” the calls or “Retry” when busy. You can add additional Contact(s) or Group(s) while the conference call is underway.

To add a Contact ad-hoc to the Call Session:

• Enter the Name and/or Number into the corresponding text boxes and click the “Add

Number” button.

To add Contacts to the Call Session:

• Select the desired Contact from the “Contact” drop down list. The Phone Numbers will load automatically; if the Contact has no Phone Numbers none will be displayed.

• Select the desired Phone Number.

• Click “Add” and the Contact will appear in the Call Session list above and a call to the Contact will immediately initialize.

To add a Call Group to the Call Session:

• Select the desired Call Group from the “Call Group” drop down list. All the Contacts in that Call Group will be listed.

• If you wish all the Contacts in that Call Group to be included in the Call Session then click the “Add Contacts to Call” button

OR

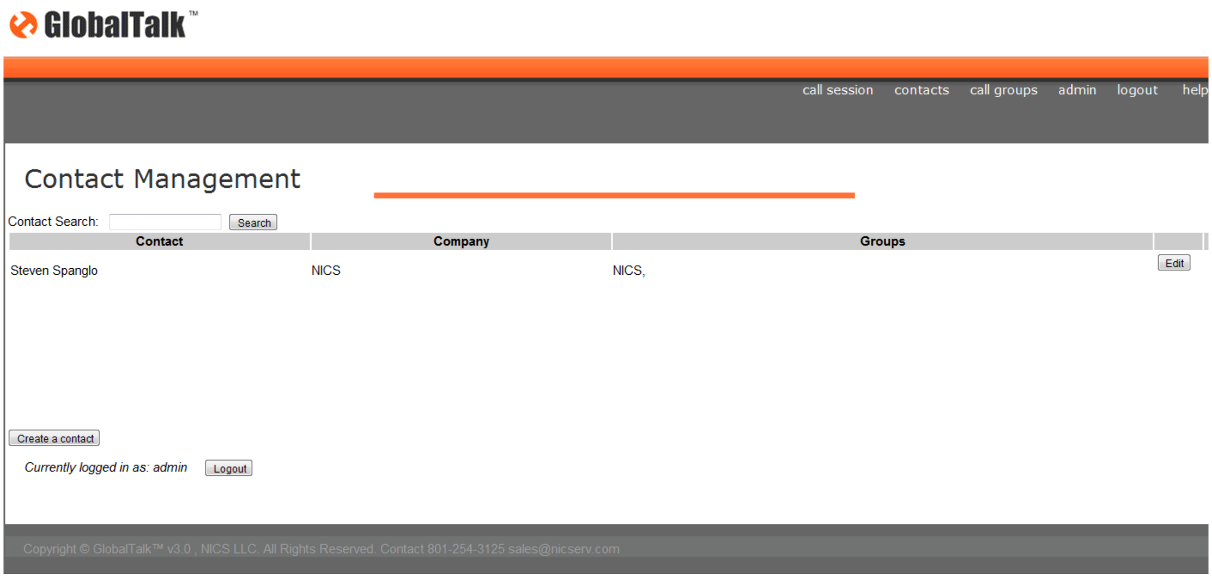
• If you do not wish a certain Contact(s) within that Call Group to be called then un-tick the “Add” button for that Contact, then click the “Add Contacts to Call” button. Only the “ticked” Contacts in that Call Group will appear in the Call Session list
• Calls to all the additional Contact(s) will immediately initialize and join the existing conference call.

When the call is finished click the “End Call” button.

This will clear both the screen in preparation for a new call session as well as clear the Admin Portal.

C. Contact Management

The picture below is a screenshot of the Contact Management list screen which is accessed by clicking 'contacts' on the menu bar.



On this screen you can search for Contacts, edit Contacts and create Contacts.

To search for a Contact:

• Enter part of the Contact name in the text box next to the Contact Search

• Click the "Search" button to search for it.

• The list below the "Search' button will then display a list of Contacts that match the search criteria, looking at both the Contact and the Company field.

Or

• If there is more than one screen of contacts, use the mouse wheel to scroll through the window (or scroll button on the right side of the screen)

To edit a Contact:

• Click on the text of the Contact or click the "Edit" button which will take you to the edit screen.

• See further detail in 'Edit Contact' section

To create a new Contact:

• Click on "Create a contact" then to go to the new contact screen.

• The following screen will be displayed:

Required Fields:

• The 'Contact name' must be entered

Additional Information:

• The 'Company' is a optional field

• 'Email' is not required. If you enter an Email address it will not be displayed on any reports or screens other than the contact screen.

When you are finished click "Save" to add the record to the database, and you will be taken to the above screen to add a phone number for this Contact.

- On this page you can add a Phone number and Description for the new Contact
- Enter the phone number as if you were dialing from your company phone e.g. 9-555-1212 for local and 9-1-780-555-1212 for long distance, 5555 for internal
- Click the "Save" button to add the Phone number and Description to the database.
- The Contact Edit Page will be automatically displayed.

You can also edit the Contact information here. You can add, edit, and delete phone numbers as well as add the Contact to Call Groups or remove them from Call Groups.

Note: Enter all phone numbers as if you were dialing from your company phone (9-555-1212 for local and 9-1-780-555-1212 for long distance, 5555 for internal). If you enter an outside number and do not add a 9 to the number, red text will appear stating that a 9 is required. Likewise if you enter a 9 in front of an internal extension red text will appear saying that a 9 is not required.

To edit or delete a Phone Number:

• Click the "Edit" or "Delete" buttons next to the Phone Number.

To add a Phone Number:

• Enter the new Number and Description in the “Phone” and “Description” fields in the “Add Phone Number” row.

• Click “Add”

• The Phone number and Description will show in the “Phone Number” box

To add the Contact to a Call Group:

• Select the desired “Call Group” from the Call Group drop down.

• Select the desired “Phone Number” for the Contact

• Click “Add”

• The Call Group and Phone number will be displayed in the “Call Group” box

Note: A Contact can have many phone numbers. You must choose one of their phone numbers to assign to a Call Group. If you want to assign all the Contact’s phone numbers to that Call Group you must add them one at a time.

To remove the Contact from a Call Group:

• Click the “Remove” button next to the “Call Group” name and “Phone number”.

To finish adding new Contact and return to Contact List:

• click the “Save” button to update the database

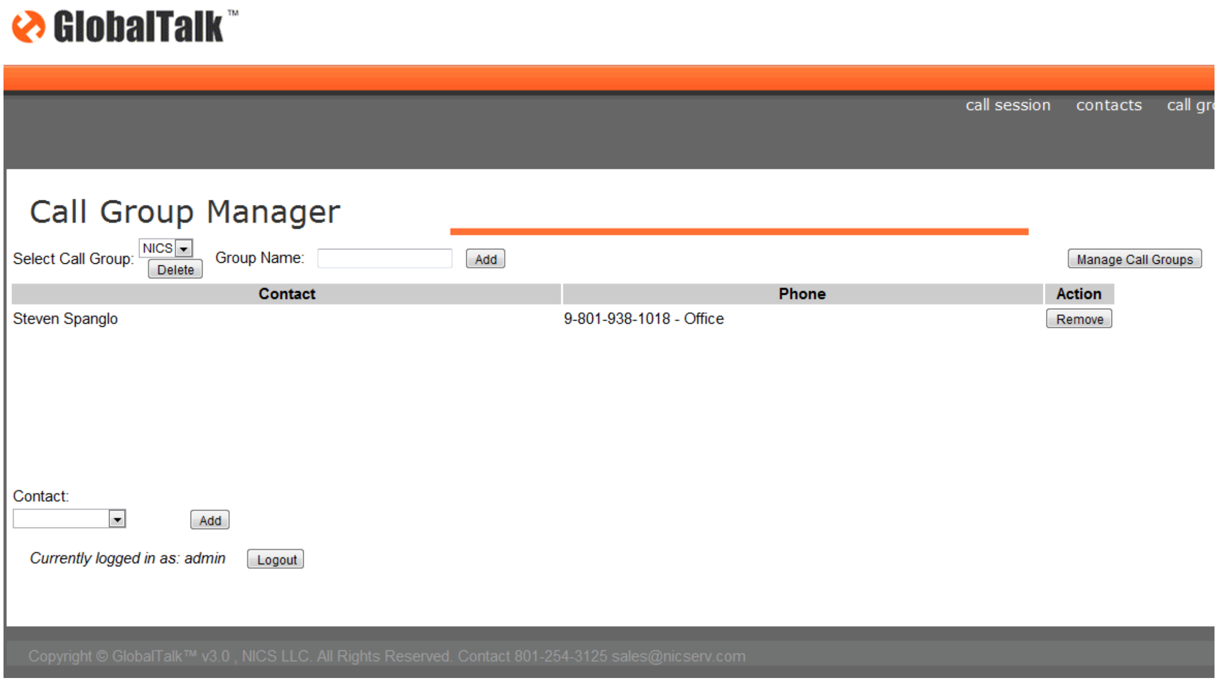
• The Contact list will be displayed.

To Delete a Contact:

• Click “Delete’. Only Administrators and Super Users have access to this function. Send an email is sent to the Administrator to ensure the master list is up to date.

D. Call Group Manager

Click the “call groups” button on the main Menu to access the Call Group Manager. Here you can add or remove Call Groups and add Contacts to or remove Contacts from a Call Group.



To add a Contact to a Call Group:

• Select the desired Call Group from the “Select Call Group” drop down list.

• Select the desired Contact from the “Contact” drop down list. The phone numbers for that Contact will display automatically in the “Phone Number” field; if the Contact has no phone numbers none will be displayed.

• Select the desired phone number from the “Phone Number” drop down list.

• Click “Add” on the same line as the contact and the Contact Name and Phone will appear in the list above.

Note1: A phone number cannot be added twice. If you try and add a phone number that is already in the list nothing will happen. If the same number appears for 2 different people, the number will only be called once.

Note2: A Contact can have many phone numbers. So you must choose one of their phone numbers to assign to a Call Group. If you want to assign all the Contact’s phone numbers to that Call Group you must add them one at a time.

To create a new Call Group:

• Enter the name of the new Call Group in the text box next to the Group Name.

• Click “Add” and the new Call Group name will appear in the drop down list.

• To Add Contacts reference above ‘*To add a Contact to a Call Group:’*

To delete a Call Group:

• Select the desired Call Group name from the “Select Call Group” drop down list at the top.

• Click the “Delete” button.

To manage the Call Groups in a list form (Change name or delete):

• Click on the “Manage Call Groups” button.

• To add a new group, click “create” or

• Click on the group name, a screen will be displayed with the Name.

• To change the Name, delete field and retype Name or type over the existing Name and click “save”

• To delete the Name, click “delete”

• To return to the Call Group List, click “cancel”