Horizon PC Softclient

Full User Guide (November 2015)

Contents

Introduction

The Horizon clients have been designed to be used in conjunction with the core Horizon service, and allow connection of either a PC desktop/laptop device, and/or connection of devices using iOS (Apple) and Android operating systems such as tablets and mobile phones.

These provide a new and exciting way of communicating with colleagues and the core Horizon service, to ensure you always maximise your productivity through managing your telephony and interactions with colleagues in the most efficient way.

The clients also provide additional features as per below and explained later in this document, through an easy to use software client:

- Soft Phone
- Instant Messaging
- Presence
- Management of your existing Horizon account

This document is designed at explaining the core functionality of the PC Softclient as well as the steps required to get it installed.

Please note: there is some core Horizon functionality referenced in this document that is not explained in detail. Where further information is required on specific Horizon features or functions please reference the Horizon user guide.

Getting started

Minimum system requirements

The PC you install the softphone on must meet the minimum system specification, otherwise you may experience performance issues. The minimum spec is as follows:

- Operating system: Windows Vista, Windows 7, or Windows 8 (Classic view only).
- The installation footprint is approximately 125 megabytes (MB).
- For voice calls, a sound card, speakers, and a microphone or a headset are required.
- A minimum 1 GB random access memory (RAM) is required.
- Minimum 1 gigahertz (GHz); however, 1.5 GHz is recommended,
- Open Graphics Library (OpenGL) 1.5 or higher is recommended.

Please note: the client may work on other versions of Windows or virtual environments, but are not officially supported

How does the client work?

On Horizon a single user account can be used for each device. This means your user account can be shared over your IP phone, your desktop client, and mobile client if applicable. In short this means that if a call is delivered to your user account, it will access all clients attached to the service, as well as your IP phone, allowing you to take the call through a device of your choice.

Likewise if you choose to adjust call settings for your user account through the client this will then be applied, meaning implementation over both your IP phone and the Horizon web interface.

It is therefore key to remember that if you don't want to be contacted on the Horizon client say on your desktop, but do want your IP phone to ring, that you simply log out of the client rather than implementing say Do Not Disturb (DND).

Finally, where the intention is to login to a single account with multiple devices of the same type at the same time (i.e. laptop and desktop using the desktop client, or mobile phone and tablet using the mobile client) calls will be delivered randomly to any of the logged-in devices. It is recommended that, where the intention is to use multiple devices, users must logout of each device when moving between them, so that only one device of each client type is logged-in at any one time.

Number Presentation

Number presentation within the Horizon clients mimics that set in the Horizon system. As such if a user generates a call from the Horizon client, this will output the number presentation assigned to the users Horizon account.

An option to hide the number for outbound calls is available within the settings.

Installation

Your Administrator will provide you with the installer in the form of a .exe file. They may opt to install this on your behalf if administration permissions are enforced on your PC. To install;

- ◆ Double-click the installer executable and follow the installation instructions.
- ◆ Launch Horizon Soft Client Application.

Signing in

When you first sign in you will be prompted to sign in - please note these are different than the Portal login details. Please speak to your Administrator if you don't have your log in details.

If required you can request the softphone to remember the password and sign you in automatically.
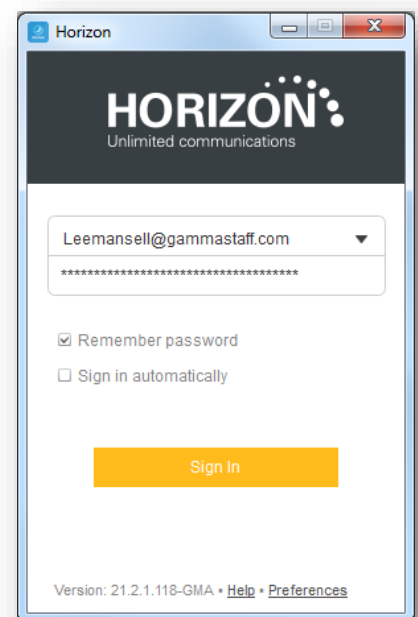
Audio input/output preferences

In order to use the PC softphone you'll need a microphone and speakers - these could be built in, or could be in the form of a USB headset. After you first install the softphone you'll want to ensure these settings are correct.
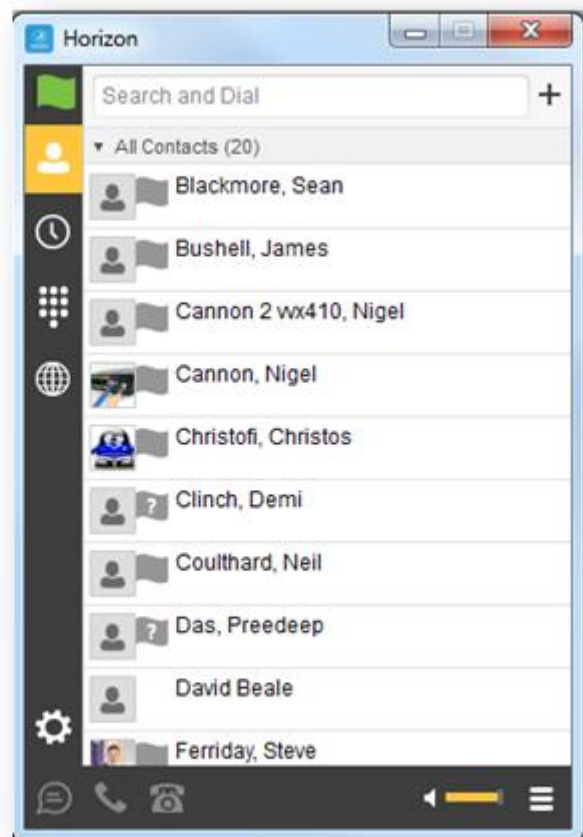
To do this select the menu item (on the bottom right) and select preferences. Select audio at the top, then ensure the output device and input device match are set to your desired choice.

Horizon
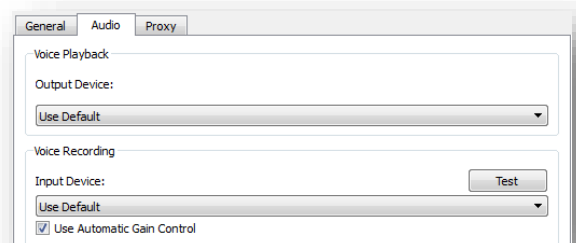
Basics

The main sections to the app can be seen down the left hand side and along the bottom of the main screen. Each of their functions are described below;

Icon	Description
🏳 (green flag)	**My Information – View and update your information, for example, your presence, avatar, and location.**
👤	**Contacts – View your contacts.**
🕐	**Communications History –** View previous chats and calls.
🌐	**Full Enterprise Directory –** Show all contacts of the directory.
⠿	**Dial Pad – Make calls, it is** integrated with the main window.
💬	**Chat – Start an instant message** conversation with a selected contact.
📞	**Call – Make an IP audio call to a** selected contact.
☎	**Call from Phone – Make a** Click-To-Dial call from your desk phone (or secondary device).
≡	**Menu – Open Call Settings,** Preferences, and Help.
⚙	**Call settings menu– Use for** quick access to call settings such as call forwarding.
+	**Add – Add a contact, group, or** conference.

Horizon application window showing:

Search and Dial   +

▼ All Contacts (20)

- Blackmore, Sean
- Bushell, James
- Cannon 2 wx410, Nigel
- Cannon, Nigel
- Christofi, Christos
- Clinch, Demi
- Coulthard, Neil
- Das, Preedeep
- David Beale
- Ferriday, Steve

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Contacts

When you start the soft client for the first time, your Contacts list will be empty. The easiest way to add a contact is to click on the directory icon, right click the user you'd like to add and select 'Add contact'. They will be sent a request to share presence with you, once accepted you can see each other's presence and instant message between each other.
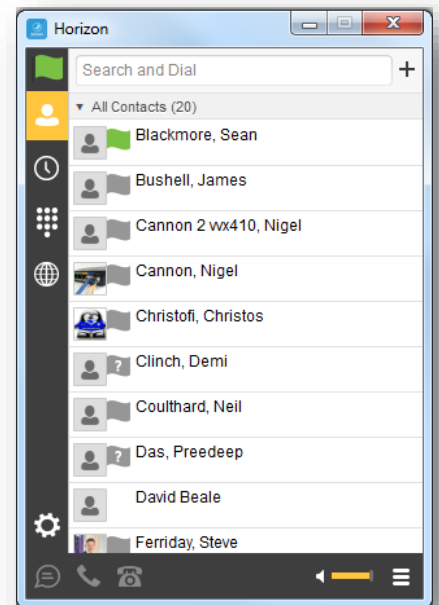
Right clicking on the contacts icon allows a user to arrange the order
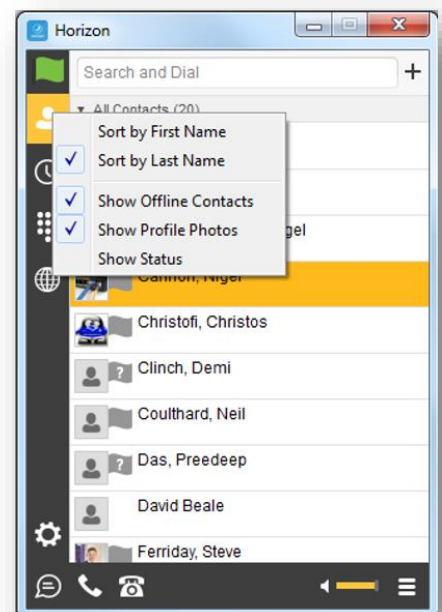

Directories

Contacts stored in the Enterprise Directory (internal), Company Directory (external) and Personal Directory can all be searched using the Contacts tab.

The directory tab will only display contacts from the internal enterprise directory.

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Making a call

To make a call to one of your contacts you can either;

- ◆ Right click and select if you'd like to call from your softphone or desk phone

- ◆ Highlight the relevant contact and click the icon depending on the type of call you'd like to make (as detailed in 'Basics')
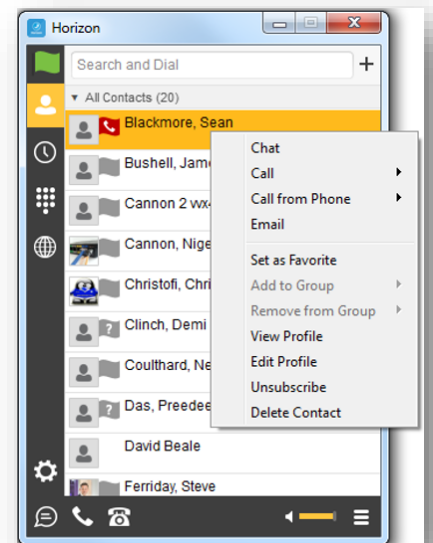
In-call Menu

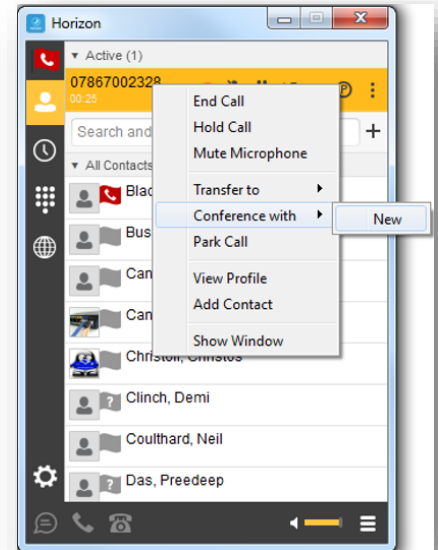Once the call has started the in-call menu will appear at the top of the window. From here you can:

- ◆ Hang Up
- ◆ Mute
- ◆ Hold
- ◆ Transfer
- ◆ Conference
- ◆ Call Park

![Horizon logo]
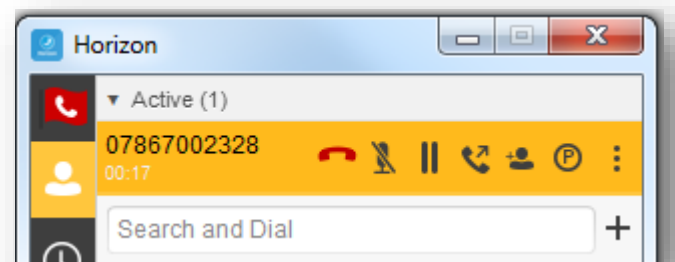
Drag and Drop Conference

Right clicking on an active call brings up further options (pictured right)

Furthermore, an active call can be dragged and dropped onto a 2nd call to create a conference.
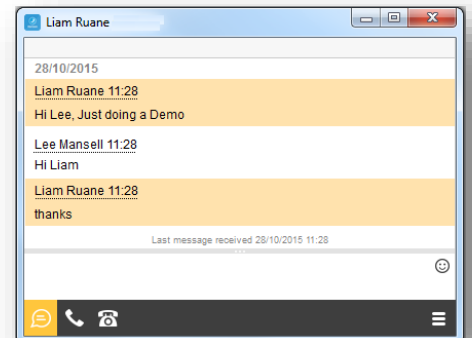

Initiate a chat

To initiate a chat with one of your contacts you can either;

◆ Right click and click 'Chat' or

◆ Highlight the relevant contact and click the 'Chat' icon (as detailed in 'Basics')

If you'd like to initiate a call to your contact you can do so by clicking one of the call icons from the bottom of the chat window.

At the top of the message area, there are four links: Yesterday, Last week, Last month, and All history. From these links, you can load history from your local storage and different time frames. You can delete the history using the drop-down menu.

Features

Communication History

The communication history section will show all of your incoming, outgoing and missed calls, as well as your chats. You can initiate calls or chats from this page by selecting the appropriate icon from the bottom of the softphone or right clicking and selecting the relevant option.

The Chat and Call History are displayed separately. They can be accessed via the orange selection at the top. In this example call history is shown

Voicemail

You can also see if you have any voicemails within this section. If you do, the Voice Mail section at the top will tell you how many. You can call your voicemail box by clicking here.
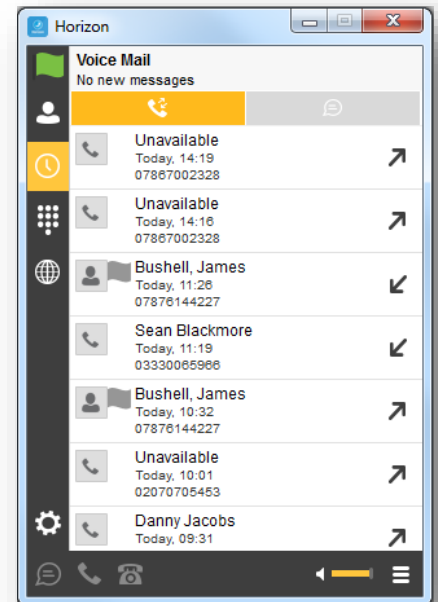

Directory

The directory tab will load all users in your company directory. You can use the white bar along the top to search/filter your results. After you locate the relevant person from the directory you can add them as a contact, initiate a chat or make a call from your softphone/desk phone. These options are available by right clicking on the mouse.

Horizon
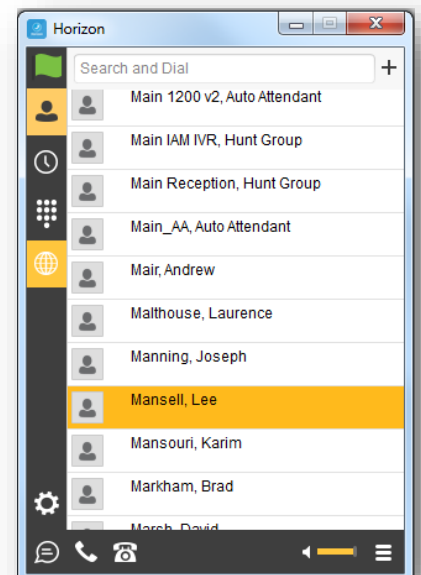
Dial-pad

Clicking the dial pad will present the screen to the right. You can input a number by either clicking the numbers with your mouse or entering them with your keyboard. You can then select whether the call is made from your softphone or your desk phone.

Clicking the handset before entering a number will enter the previously dialled number
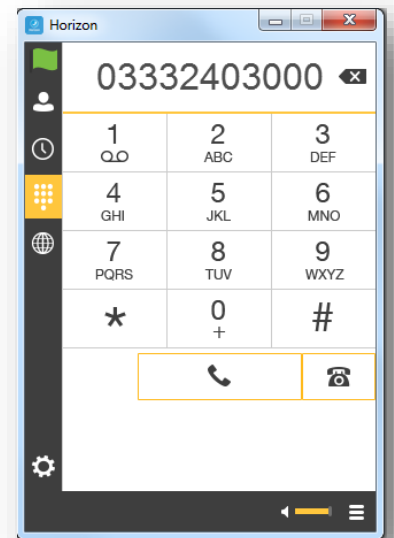
My information

Clicking on the flag will allow you to update your own information. Areas to be edited include;

- Status - by clicking the ∨ next to your current status

- Location - by clicking set location

- Profile picture - by right clicking the image section. You can either clear your current picture or add a new one
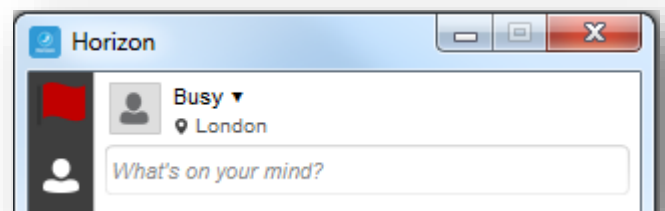
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Options menu

The options menu can be located on the bottom right of the softphone, as shown to the right. Within there you can carry out the following;

- ◆ Pull/retrieve call

- ◆ Call settings (for full definitions of features please see the Horizon user guide)

  - ~ Twinning
  - ~ Remote office
  - ~ Forward calls (always/busy/unanswered)
  - ~ Do not disturb
  - ~ Withhold my number
  - ~ Preferences
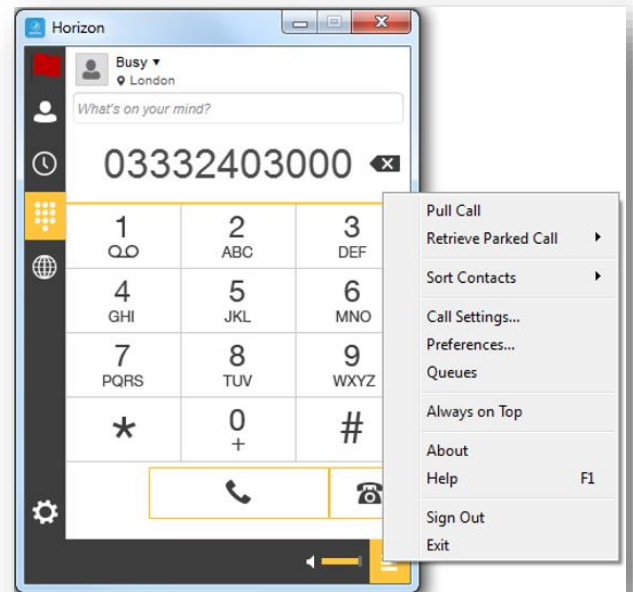
Pull/retrieve call

These options allow you to;

- ◆ Pull call. This is where a user can over a live call from another device, i.e. their desk phone

- ◆ Retrieve call. User would dial the location then # to retrieve the call.
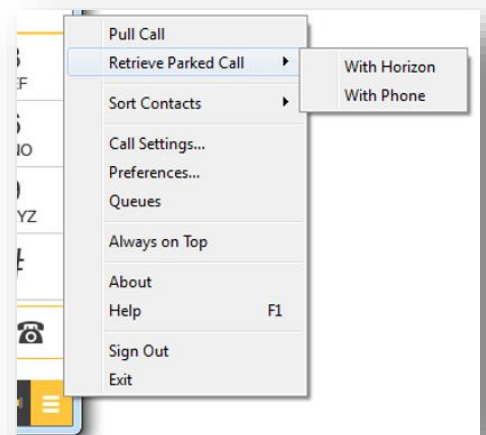
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Queues (Call Centre & Call Queue Groups)

The PC Client can be used with Call Queue Groups and Call Centre on Horizon (the corresponding agent licence is required for each). The queues menu can be accessed from the settings options at the bottom right of the client. Once selected the following options are available for an agent:

Sign In/Out

- Sign-In: Agent can sign in to the call centre.
- Sign-Out: Sign out of the call centre

Agent Status

An agent can also change their status

- Available - Calls will be routed to the agent
- Wrap Up - Calls will not be routed to the agent for a period of time set by the administrator. Once this time has expired, the agent will change to available.
- Unavailable - Calls will not be routed to the Agent

Unavailable Codes

In the example above right, the administrator has switched unavailable codes on and pre-set some options. When the agent selects unavailable, they will now have to choose a reason for the change.

Log in & Out of Queues

If the administrator has set "Allow Agents to Join Call Centres" in the Horizon GUI, then the PC Client can be used by the agent to select which call centres/queues groups they want to join.
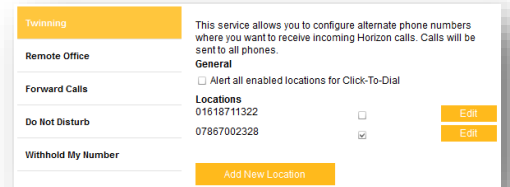
In the example to the right, this agent is a member of "LeeTestCC" but has not joined "Lee_Call_Centre". Only calls for "LeeTestCC" will be routed to this agent, assuming their status was available.
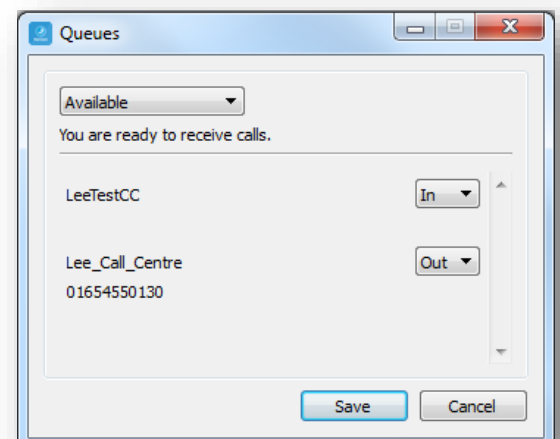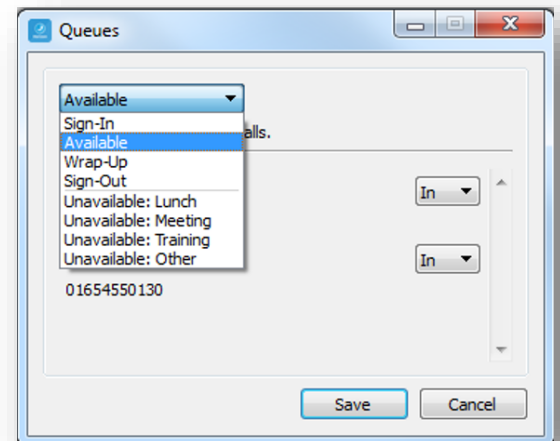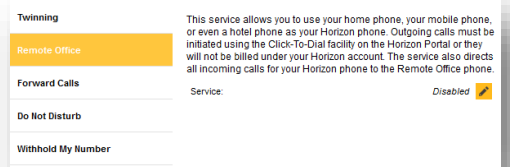
Call settings

Twinning

Twinning allows you to specify one or more numbers that will ring any time you receive an incoming call to your Horizon extension. You can activate these individually, or all at once, as required.
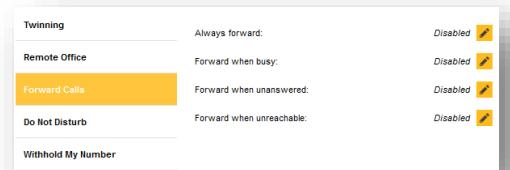

Remote office

Direct calls coming into a user's Horizon number to a remote specific phone. You can also maintain the number being used for remote office.
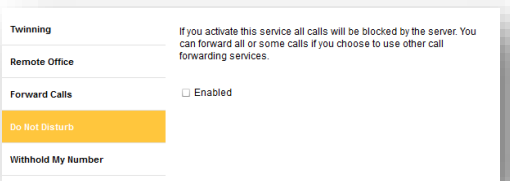

Forward calls (always/busy/no answer)

Here you can enable/disable any call diverts for the three scenarios detailed and maintain the divert numbers as required.
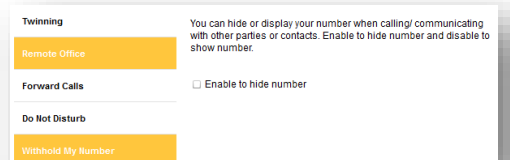

Do not disturb

Do not disturb will stop calls arriving at your phone. This allows you to enable/disable this feature as required.

Withhold my number

Withhold my number will prevent people receiving a call from seeing a user's DDI. This allows you to enable/disable this feature as required.

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Preferences

Preferences allows you to define some characteristics of the softphone, such as whether it starts automatically when Windows does. Some of the other common fields are;

- Confirmation - specify whether you'd like to be prompted for confirmation when removing data

- Sign in automatically - whether you'd like the softphone to sign you in as soon as it starts

- Run the programme when the system starts - if you'd like the softphone to start when Windows starts

- Audio > Output/Input - specify the devices you'd like to use as your speakers and microphone