

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.

Communication Assistant: Version 3.0 or later

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 CA Client.

The Quick Reference Guide is divided into the following sections:

1 Specifications

This section provides general information about the features in CA Client.

2 System Connection Diagram

This section shows how CA Client fits into your network.

3 System Requirements

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

4 Software Installation

This section explains how to install and uninstall CA 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.

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:

<u>WARNING</u>	This notice means that misuse could result in death or serious injury.
<u>CAUTION</u>	This notice means that misuse could result in injury or damage to property.

Notice

- If an older version of CA Client is installed over a newer version, the software may not function properly. If you want to downgrade your version of CA Client, uninstall the current version, then install the older version.
- When using CA Client, be sure the system display font is set to normal size (96 dpi).
- When you uninstall the CA application, the Licence Registration Keys of IP Softphones will be deleted. Please make a record of the Licence Registration Keys of IP Softphones before you uninstall the CA application.
- 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.

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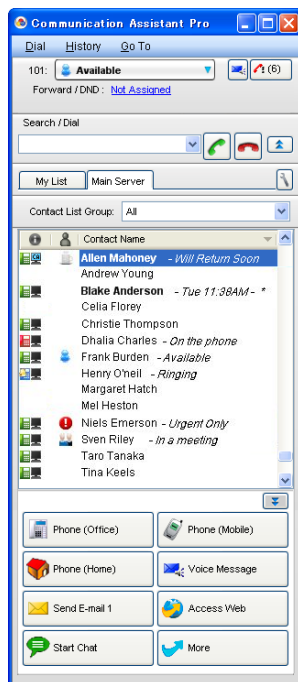
1 Specifications

Features

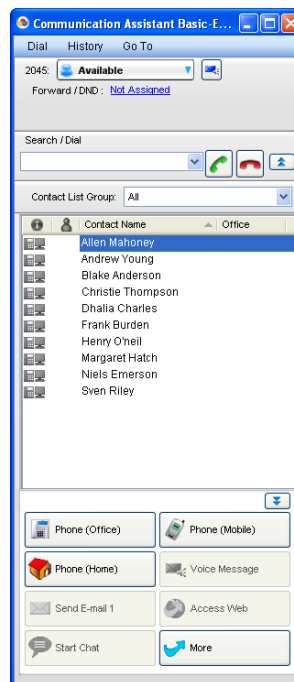
Contact List with Presence

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.

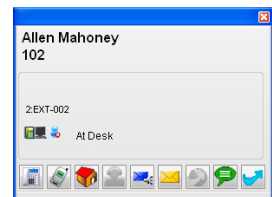
CA Client Pro Contact List



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.
- You can set your presence to display an absent message of the current date and time, after a specified amount of time has passed with no operations being performed. This can be enabled in **Options** from the Absent Message drop-down list.
- The PC icon in the contact list shows the login status of other CA users:



: The user is logged in.



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



: The user is not logged in, or the status of the contact could not be confirmed over the network.

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

- Each PBX in your network has a tab above the contact list with that PBX's contacts. Click a tab to view that PBX's contacts.
- Multiple contacts can be selected at once for performing operations such as copying, deletion, etc.

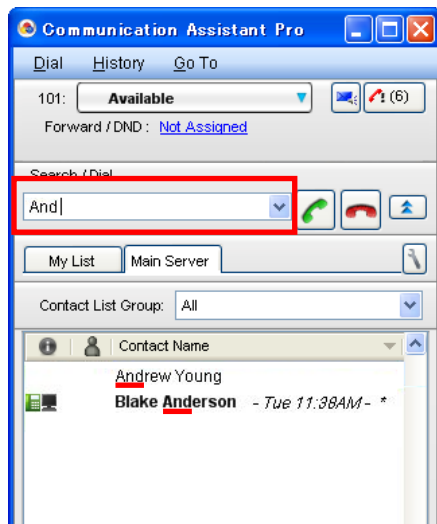
Note

- To view the contacts of other PBXs in your network, each PBX must be connected to a CA Server. For details, see the CA Server Quick Reference Guide.
- You can set which networked PBXs are displayed as tabs. From the **Go To** menu, select **Option**, then **Network Server**. Tabs for up to 7 other PBXs can be displayed.

- Basic-Express users cannot use contact list tabs.

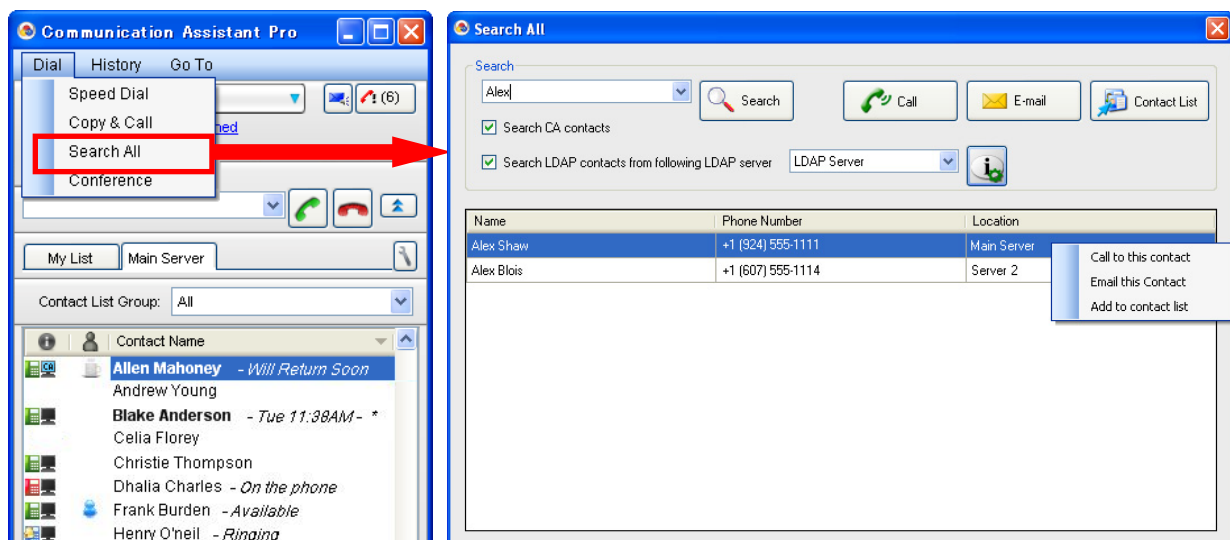
Searching for Contacts

When many contacts are displayed at once, you can narrow down the list of displayed contacts by entering a name or part of a name into the search box.



Search All Contacts

Choose **Search All** from the **Dial** menu to search all PBX contact lists as well as your network's LDAP directory. Enter a name or part of a name and click **Search**. From the search results, you can make a call or add an LDAP directory member to your CA Client contacts.

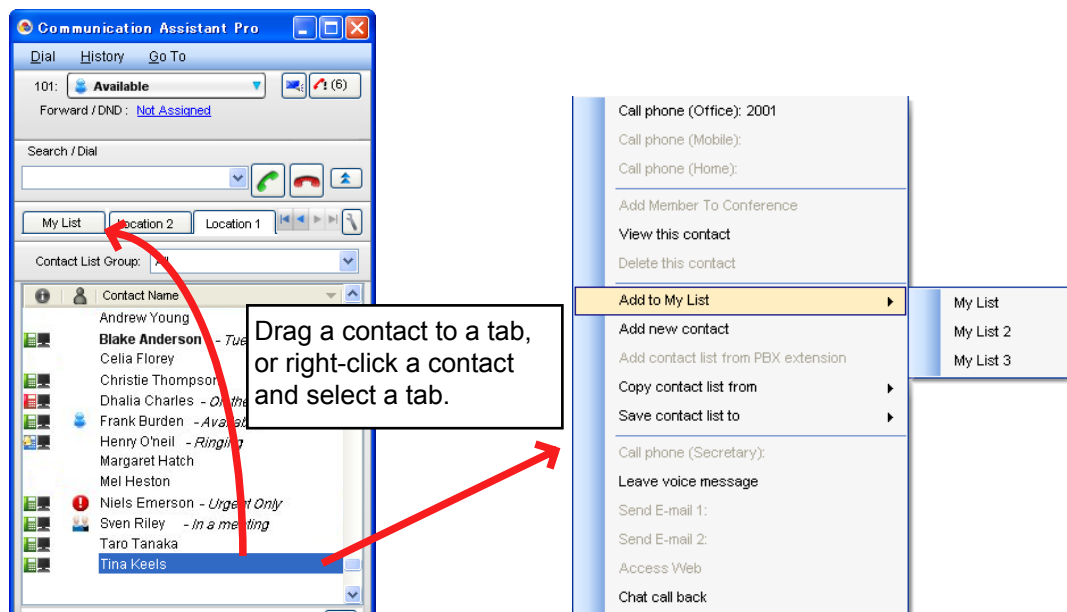


This feature supports LDAP v3 compliant databases (e.g. Microsoft® Active Directory®). However, this feature may not work with some LDAP compliant databases, depending on the database's specifications.

My List

If CA Server is installed on your network, you can personalise which contacts to display in the contact list using the My List function. My List is a convenient way to manage and display contacts that you communicate with

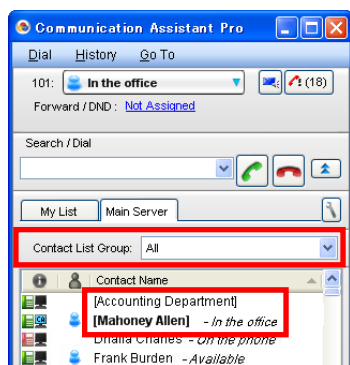
most often. Just drag and drop any contact from a PBX's contact list onto a My List tab. You can also right-click a contact and select **Add to My List**.



You can create multiple My List tabs to further organise your contacts. A maximum of 5 different My List tabs can be created, with up to 128 contacts per tab.

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]").

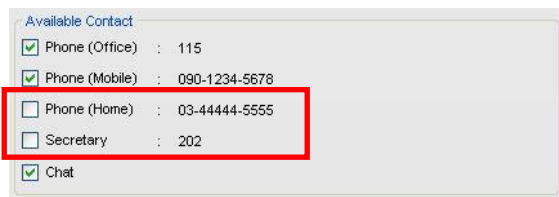


Restricting Contacts by Presence

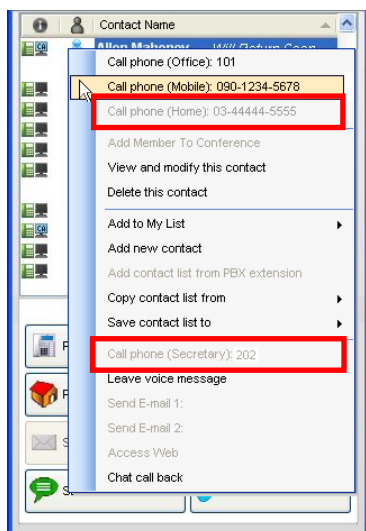
If CA Server is installed on your network, you can restrict which of your contacts are available to be called by other CA Client users, according to your presence.

Example

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



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



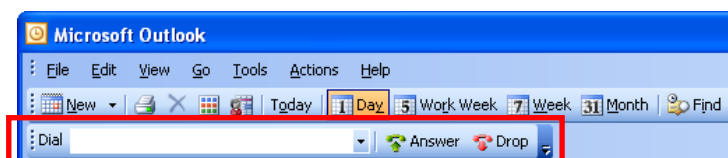
Network Features

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.

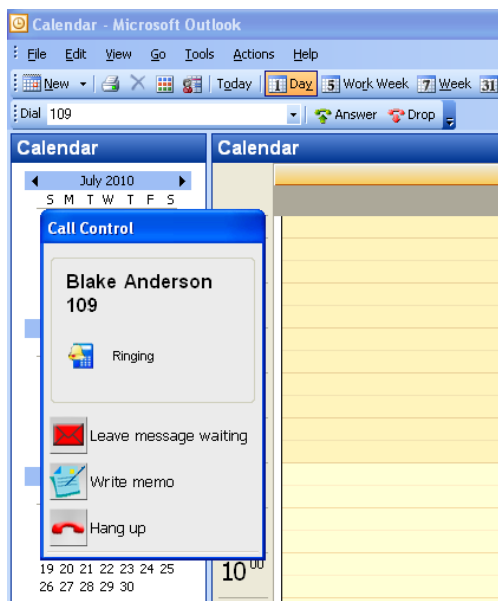
CRM Integration

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® 2003/2007/2010 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.

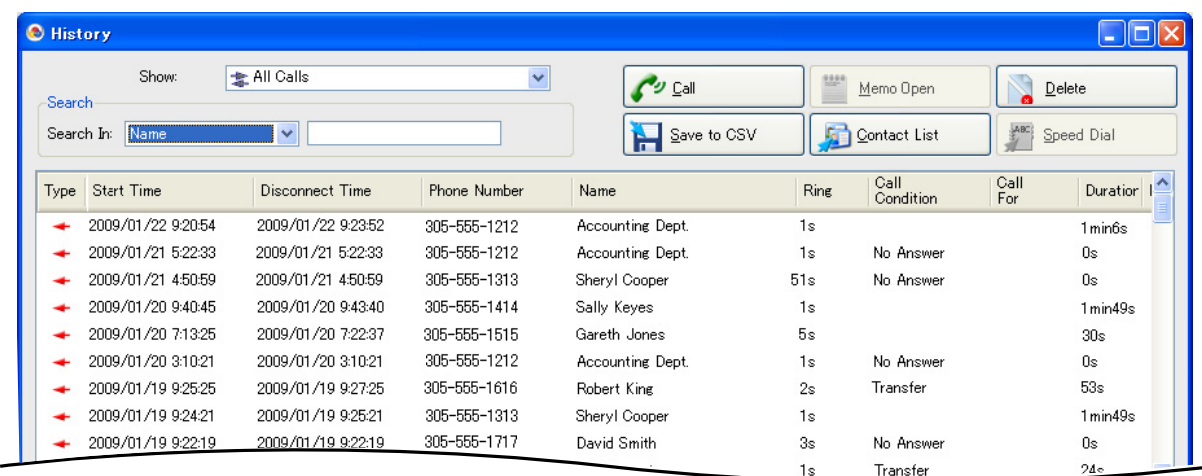


Calls can be made directly from Outlook:



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.



Type	Start Time	Disconnect Time	Phone Number	Name	Ring	Call Condition	Call For	Duration
→	2009/01/22 9:20:54	2009/01/22 9:23:52	305-555-1212	Accounting Dept.	1s			1min6s
→	2009/01/21 5:22:33	2009/01/21 5:22:33	305-555-1212	Accounting Dept.	1s	No Answer		0s
→	2009/01/21 4:50:59	2009/01/21 4:50:59	305-555-1313	Sheryl Cooper	51s	No Answer		0s
→	2009/01/20 9:40:45	2009/01/20 9:43:40	305-555-1414	Sally Keyes	1s			1min49s
→	2009/01/20 7:13:25	2009/01/20 7:22:37	305-555-1515	Gareth Jones	5s			30s
→	2009/01/20 3:10:21	2009/01/20 3:10:21	305-555-1212	Accounting Dept.	1s	No Answer		0s
→	2009/01/19 9:25:25	2009/01/19 9:27:25	305-555-1616	Robert King	2s	Transfer		53s
→	2009/01/19 9:24:21	2009/01/19 9:25:21	305-555-1313	Sheryl Cooper	1s			1min49s
→	2009/01/19 9:22:19	2009/01/19 9:22:19	305-555-1717	David Smith	3s	No Answer		0s
→					1s	Transfer		24s

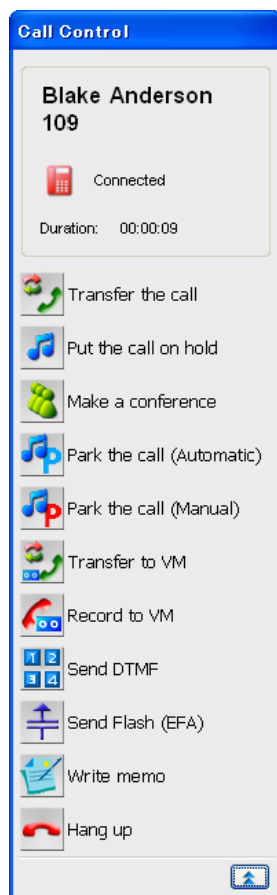
Absent Message/Forward/Do Not Disturb

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.

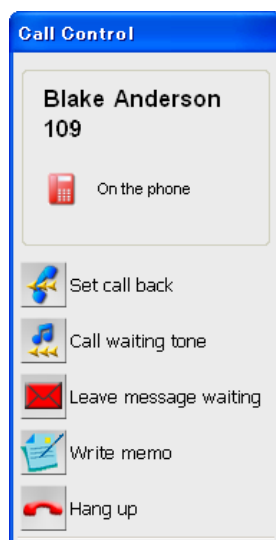
Call Control

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:



Conference Features

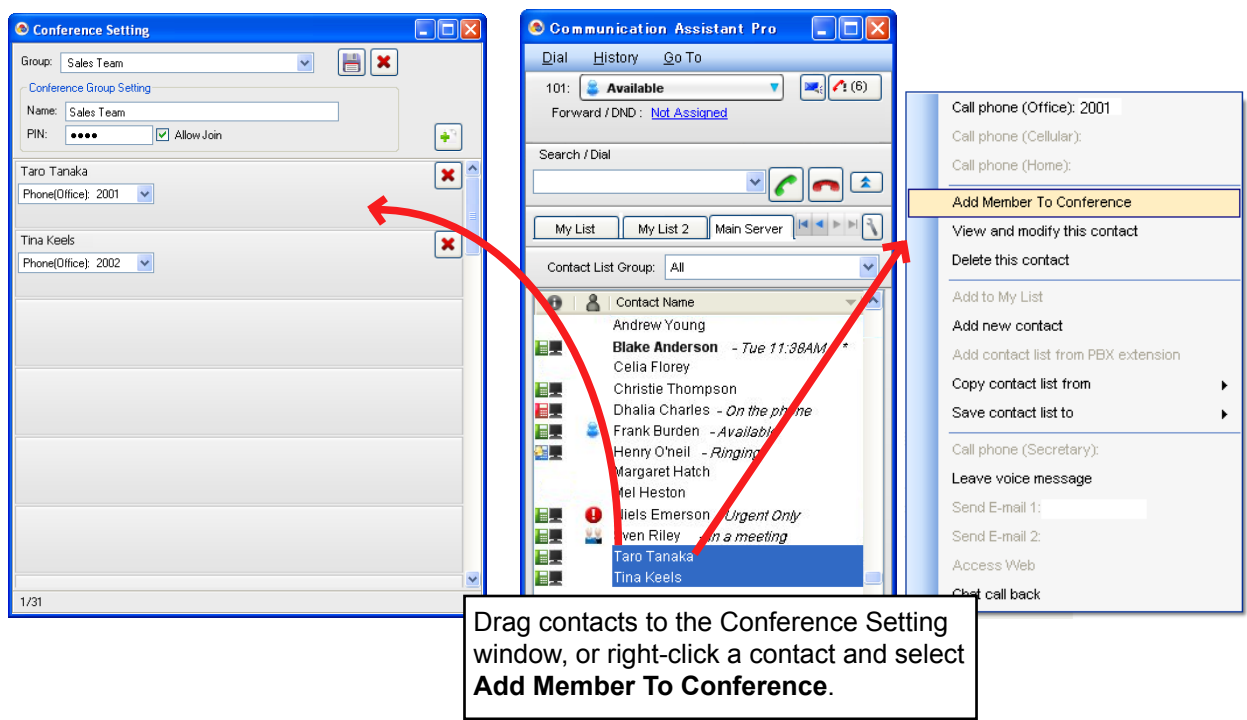
A conference can be easily initiated using the conference interface. Choose **Conference** from the **Dial** menu to open the Conference group list. You can check the status of conferences in progress, request to join a conference, or start a conference if your extension has that ability enabled.



The screenshot shows a window titled "Conference" with a blue header bar. Below the header is a button labeled "Edit Conference Setting". The main area contains a list of eight conference groups, each with a dropdown menu and a "Start" button. The first group, "Conference Group 1", has a dropdown menu showing "Sales Team" and a "Start" button. The remaining seven groups, "Conference Group 2" through "Conference Group 8", have dropdown menus showing "Test" and "Start" buttons. Each group also has a status indicator "8 (Default: two-way)" below the dropdown menu.

Conference Group	Dropdown Menu	Start Button	Status
Conference Group 1	Sales Team	Start	8 (Default: two-way)
Conference Group 2	Test	Start	8 (Default: two-way)
Conference Group 3	Test	Start	8 (Default: two-way)
Conference Group 4	Test	Start	8 (Default: two-way)
Conference Group 5	Test	Start	8 (Default: two-way)
Conference Group 6	Test	Start	8 (Default: two-way)
Conference Group 7	Test	Start	8 (Default: two-way)
Conference Group 8	Test	Start	8 (Default: two-way)

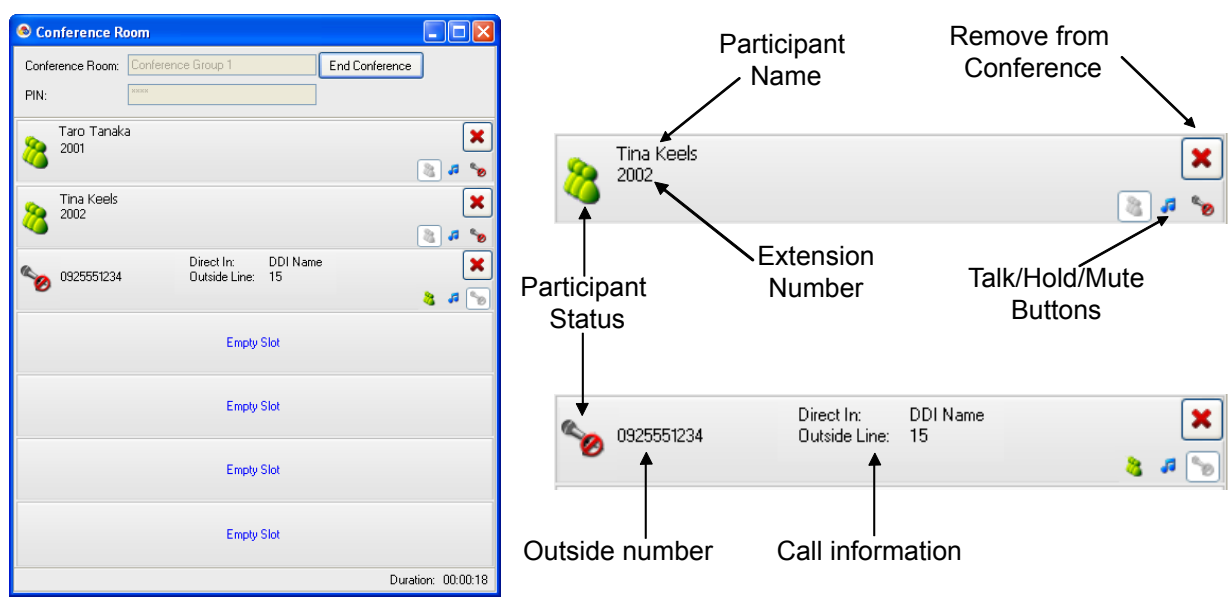
The originator of the conference can click **Edit Conference Setting** and make a conference of up to 32 participants. To add members to a conference, drag and drop contacts from a contact list to the conference setting window, or right-click a contact and select **Add Member To Conference**.



Notice

If you make changes to conference member settings from CA Client and begin a conference call, the new settings will be used instead of the PBX's conference call settings, and the PBX's conference call settings will be cleared.

Once the conference has started, a PBX extension user (or outside caller accessing the PBX using DISA) can join the conference. During a conference, the originator of the conference can enable or disable the ability of other members to speak, put them on hold, or remove them from the conference.



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).

Note

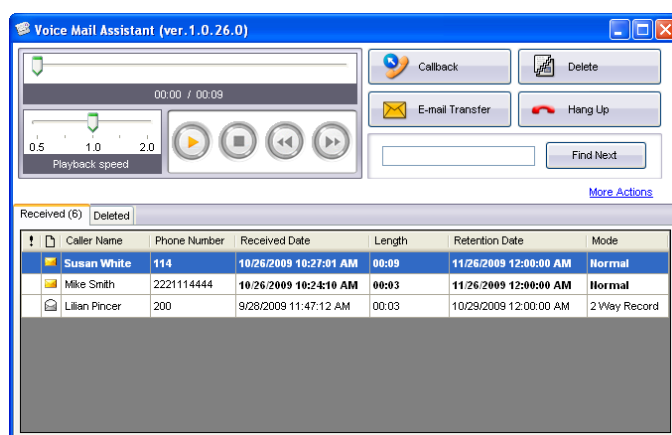
This feature requires Internet Explorer® version 6.0 or higher.

Voice Processing System (VPS) Integration

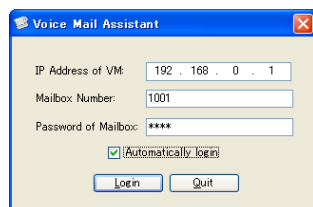
You can record conversations to voice mail automatically or manually. When a message is left on your mailbox, a message waiting indication is displayed.

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).

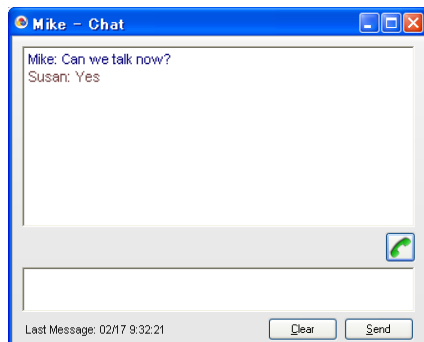
IP Softphone

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.



- The chat feature can be restricted according to user's Class of Service (COS) settings. Only extensions permitted to use chat will be able to initiate a chat session.
- A chat session uses 1 available port in the range 42525–42534.

Note

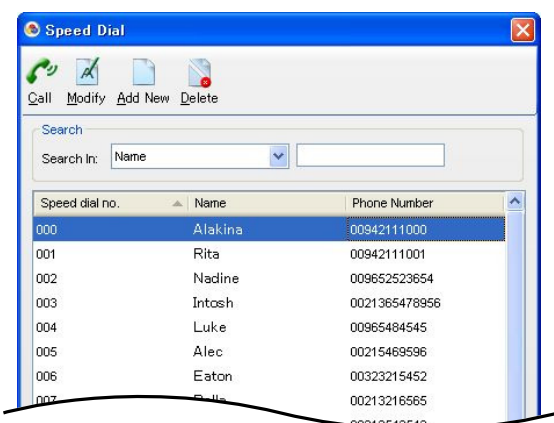
A network activation key is required when using this feature with users connected to other PBXs.

System Speed Dial Control

If you log in at an extension that is assigned as a manager in its 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.



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.

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

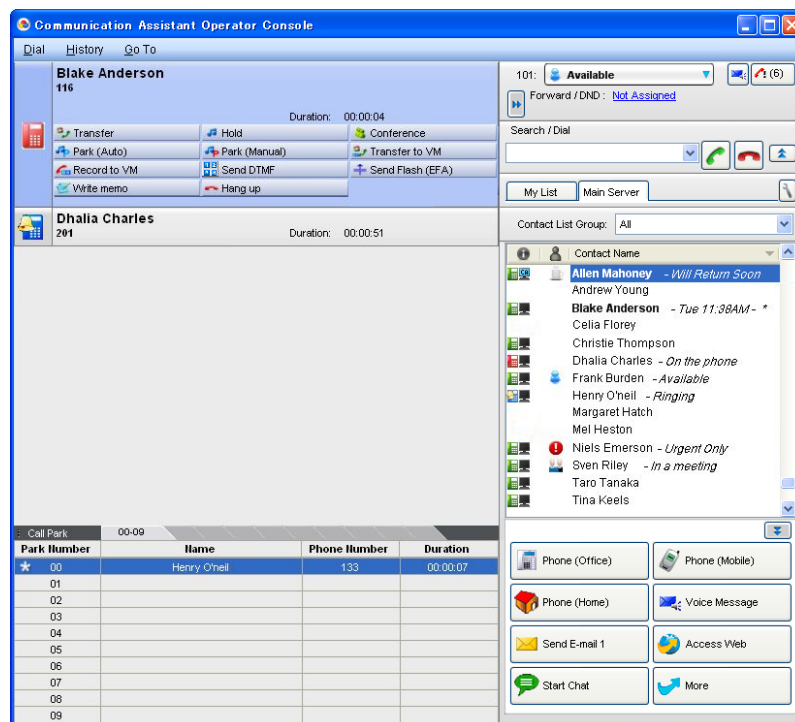
The docking feature of the Function Key Bar is not available when using a thin client.

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:

- Perform unscreened transfers
- Change some settings of other extensions (e.g. FWD/DND, Absent Message, extension lock/unlock, etc.)
- Listen in on conversations
- Take over calls
- Override busy extensions



Note

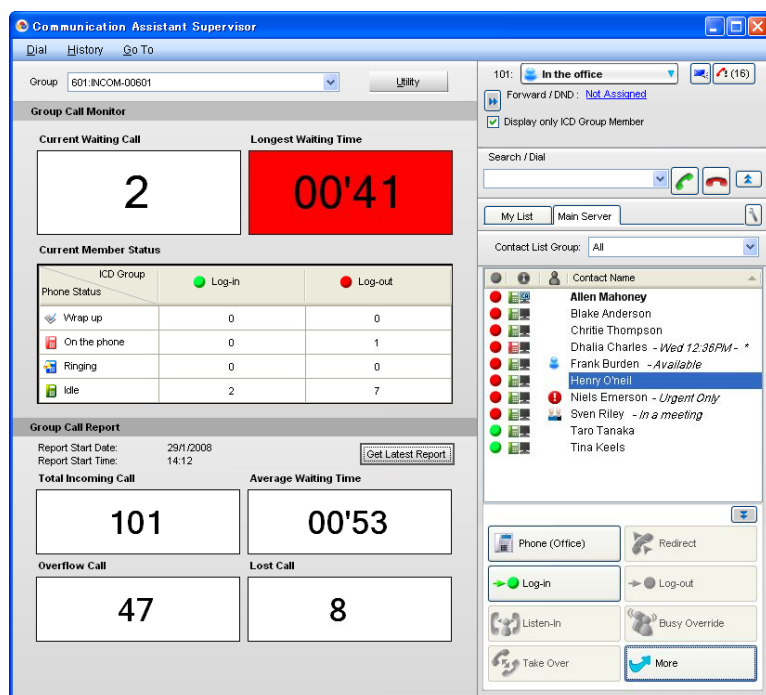
- To enable extension control features, your extension must be assigned as a manager in its COS settings on the PBX.
- To use the listen-in function, your extension must have "Call Monitor" enabled in its COS settings on the PBX.

- To use the busy override/take over functions, your extension must have "Busy Override" enabled in its COS settings on the PBX.

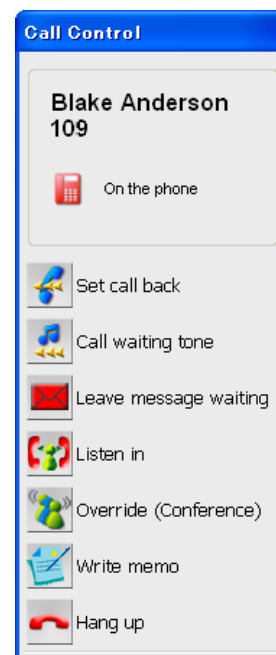
Supervisor Features

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. When you view the presence of busy ICD group members, information about the call and the party they are talking to is also displayed.

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 COS settings on the PBX.
- To use the busy override/take over functions, your extension must have "Busy Override" enabled in its COS settings on the PBX.

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

Feature	Basic-Express	Pro	Operator Console	Supervisor
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	Yes	Yes
ICD group supervisor	No	No	No	Yes
Conference Interface	No	Yes	Yes	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 and Operator Console. During the trial period, all the features of CA Pro and Operator Console 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 and Operator Console 60-day trials
KX-NCP500/KX-NCP1000	5	2 ^{*1}
KX-TDE100/KX-TDE200	10	4
KX-TDE600	20	8

^{*1} 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 CA Server is installed on your network.

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

CA Client Login Mode	No. of Users PBX Only (Up to 240 total users)	No. of Users with CA Server (Up to 1022 total users)
Basic-Express	240	1022
Pro		
Operator Console	128	128
Supervisor	4	

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.

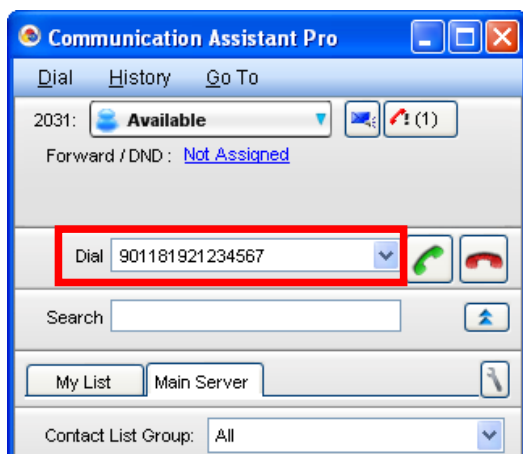
Example

Copy a telephone number from another application.

```
Thank you very much for your time.

*****
Michael Victor
Tokuoka Kikaku
Phone: +81-92-123-4567
Fax:   +81-92-123-5678
*****
```

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.

Note

This operation can only be performed when the Dial and Search boxes are not combined. From the **Go To** menu, select **Option**, and then select **Display**. On this screen, select **Disable** for **Combine Search and Dial**, and click **OK**.

Dial Modification Settings

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

① 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

② Remove "(0)" check box

Deletes the string "(0)" from a copied external telephone number.

[Example]

+81-(0)1-2345-6789P12 → +81-1-2345-6789P12

③ 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
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.
- The following call functions are not available when CA Client is used with a PS:
 - Answering incoming calls using the CA Client interface
 - Listen In (CA Supervisor, CA Operator Console)
 - Busy Override (CA Supervisor, CA Operator Console)
 - Take Over (CA Supervisor, CA Operator Console)
- When callback ringing is used with the following features, the call must be manually answered using the PS:
 - Make call
 - Message Waiting callback
 - Account Code Entry
 - Call Pickup
 - Leave Message Waiting
 - Open door
- The following are not supported in CA Client:
 - Call handling with a PS in Wireless XDP Parallel mode
 - Calls using the PDN/SDN button
- 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.
 - **Absent Message**

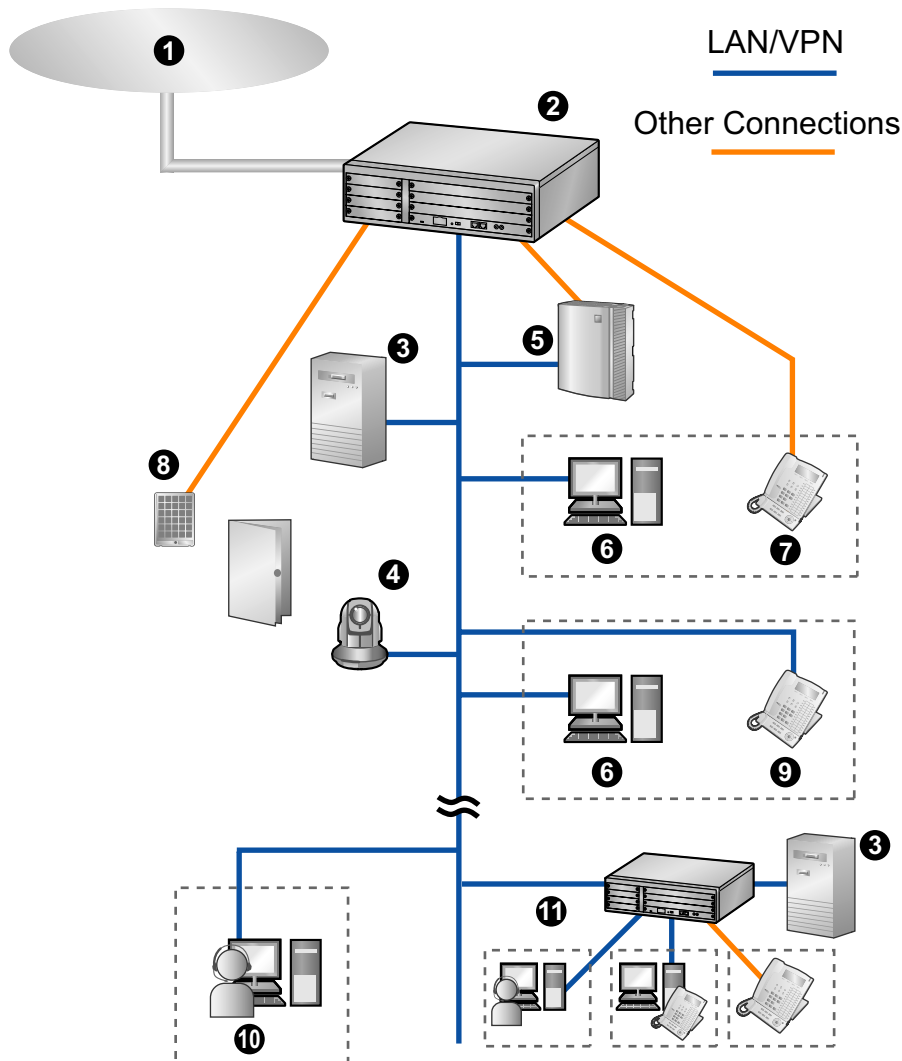
If you are connecting to a CA Server, and that CA Server is not within your Local Area Network (LAN), do not enable the Auto Absent Message feature.
 - The VM menu feature for a display PT should be disabled in the COS settings on the Voice Processing System (VPS). If it is not disabled, you cannot record 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.
 - **Conference Features**

During a conference, a maximum of 8 participants (including the originator) can have the ability to speak at one time. To allow other members to speak, one of the participants that already has the ability to speak must first be muted using the conference interface.

2 System Connection Diagram

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



- 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 Remote PC running CA Client with Softphone
- ⓫ Networked PBX and Networked CA Client Users and Extensions

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, including contacts of other networked PBXs, 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	1000
2.0 GHz Intel Pentium/Celeron processor or comparable CPU	1 GB	128	1000
2.6 GHz Intel Pentium/Celeron processor or comparable CPU	1 GB	256	1000
2.6 GHz Intel Core™2 Duo processor or comparable CPU	1 GB	1000	1000

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	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	10/100Base-T	100Base-T

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, confirm your PBX matches the requirements listed below.

PBX Model	Required Software File Version
KX-NCP500/KX-NCP1000	PBMPR Software File Version 4.1000 or later
KX-TDE100/KX-TDE200	PMMPR Software File Version 4.1000 or later
KX-TDE600	PGMPR Software File Version 4.1000 or later

- For KX-TDE600 users, it is strongly recommended to use CA Server with CA Client. For more information about CA Server, contact your dealer.

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-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

Notice

If an older version of CA Client is installed over a newer version, the software may not function properly. If you want to downgrade your version of CA Client, uninstall the current version, then install the older version.

Note

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

1. Double-click the setup program according to your operating system configuration:

- 32-bit version: **Setup(World).msi**
- 64-bit version: **Setup64(World).msi**

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:

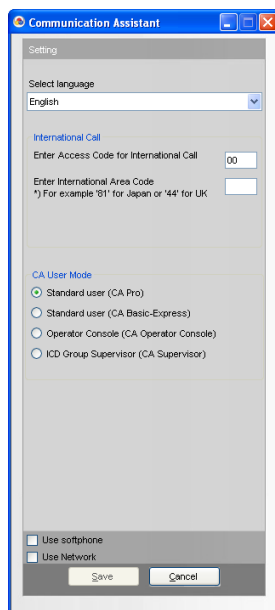
- **Non-thin Client Environment:** Use CA Client as a regular program installation.
- **Thin Client Environment:** Use CA Client in a thin client environment. Select this only when installing CA Client onto a thin client server.

Optional Feature Selection

In this step, you can select to add the following during installation:

- **CRM Toolbar:** Add a CA Client toolbar to Microsoft Outlook.
- **IP Softphone:** Install the IP Softphone program for use with CA Client. This option will not be available if **Thin Client Environment** is chosen in the previous step.

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.**

4.1 Installing and Starting CA Client

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 16) for a summary of the different modes.

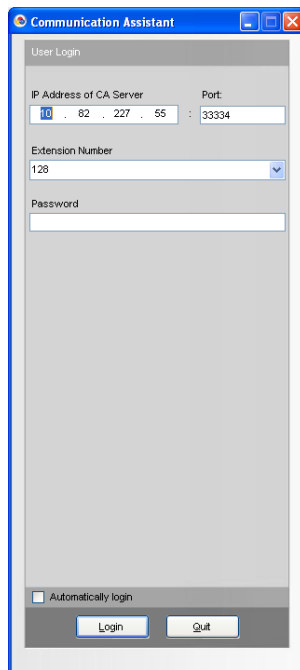
Check the following features to use them in CA Client:

- **Use softphone:** The IP Softphone will load automatically each time CA Client is started. An IP Softphone activation key for your extension is required to use this feature.
- **Use Network:** You can view other PBX's contact lists and use CA features over a network connection. CA Server and a network activation key are required to use this feature.

3. Click **Save**.

4. Enter the IP address and port number of the CA Server you are connecting to. If connecting directly to a PBX, enter the IP address and port number of the PBX instead. Then, enter your extension number and password.

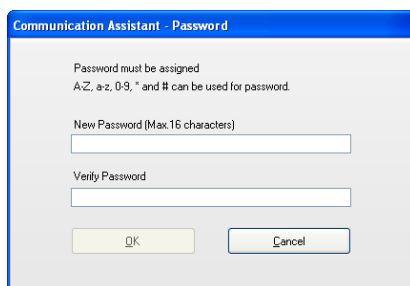
If this is the first time you are logging in for the extension, leave the password blank.



The screenshot shows the 'Communication Assistant' window with a 'User Login' tab. It contains the following fields and controls:

- IP Address of CA Server:** A text field with the value '10.82.227.55'.
- Port:** A text field with the value '33334'.
- Extension Number:** A dropdown menu showing '128'.
- Password:** An empty text field.
- Automatically login:** An unchecked checkbox.
- Login and Quit buttons:** Two buttons at the bottom.

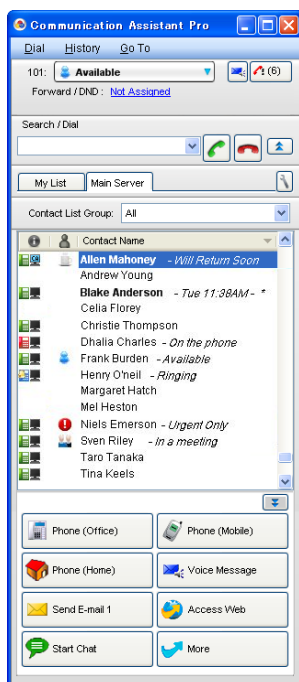
- If you are allowed to log in with a blank password, a dialogue box is displayed prompting you to create a password. Enter a password in **New Password**, re-enter it in **Verify Password**, and click **OK**.



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

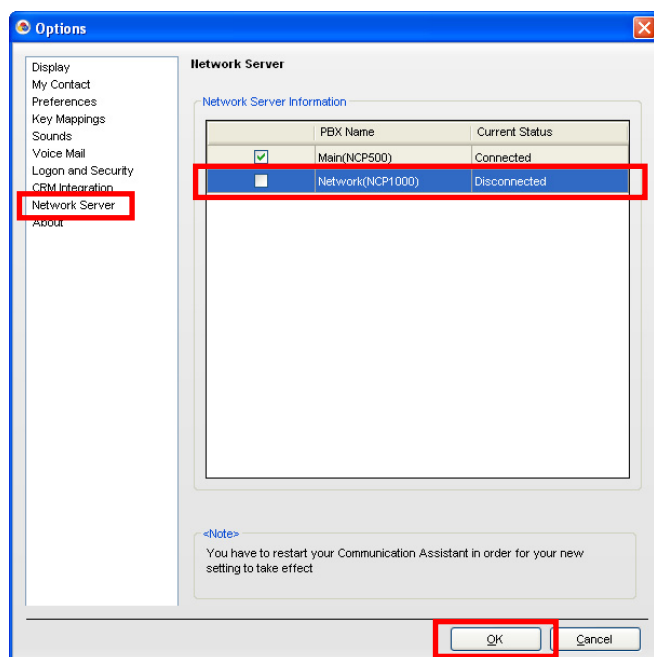
If CA Server has been installed on your network, before changing CA Client from a PBX connection to a CA Server connection, it is recommended to uninstall CA Client, then reinstall it. If this procedure is not done, all of your contacts will be moved to the 'Business' contact list group.

Network Settings

To enable the display of other networked PBX's contact lists, perform the following procedure:

4.2 Uninstalling CA Client

1. On the CA Client main screen, from the **Go To** menu, select **Option**. On the **Network Server** screen, select which networked PBX's contact lists to display in CA Client. Then click **OK**.



2. Close and restart CA Client.
3. Tabs with contacts for each selected PBX can now be viewed and used.

Note

- Up to 8 PBXs (including your own) may be selected.
- During the initial setup of CA Client, **Use Network** must be checked, and CA Server and a network activation key are required to use this feature.

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**.

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