

# **Using IP Office SoftConsole**

© 2020-2022, Avaya Inc. All Rights Reserved.

#### **Notice**

While reasonable efforts have been made to ensure that the information in this document is complete and accurate at the time of printing, Avaya assumes no liability for any errors. Avaya reserves the right to make changes and corrections to the information in this document without the obligation to notify any person or organization of such changes.

#### **Documentation disclaimer**

"Documentation" means information published in varying mediums which may include product information, operating instructions and performance specifications that are generally made available to users of products. Documentation does not include marketing materials. Avaya shall not be responsible for any modifications, additions, or deletions to the original published version of Documentation unless such modifications, additions, or deletions were performed by or on the express behalf of Avaya. End User agrees to indemnify and hold harmless Avaya, Avaya's agents, servants and employees against all claims, lawsuits, demands and judgments arising out of, or in connection with, subsequent modifications, additions or deletions to this documentation, to the extent made by End User.

#### Link disclaimer

Avaya is not responsible for the contents or reliability of any linked websites referenced within this site or Documentation provided by Avaya. Avaya is not responsible for the accuracy of any information, statement or content provided on these sites and does not necessarily endorse the products, services, or information described or offered within them. Avaya does not guarantee that these links will work all the time and has no control over the availability of the linked pages.

#### Warranty

Avaya provides a limited warranty on Avaya hardware and software. Refer to your sales agreement to establish the terms of the limited warranty. In addition, Avaya's standard warranty language, as well as information regarding support for this product while under warranty is available to Avaya customers and other parties through the Avaya Support website: <a href="https://support.avaya.com/helpcenter/getGenericDetails?detailId=C20091120112456651010">https://support.avaya.com/helpcenter/getGenericDetails?detailId=C20091120112456651010</a> under the link "Warranty & Product Lifecycle" or such successor site as designated by Avaya. Please note that if You acquired the product(s) from an authorized Avaya Channel Partner outside of the United States and Canada, the warranty is provided to You by said Avaya Channel Partner and not by Avaya.

"Hosted Service" means an Avaya hosted service subscription that You acquire from either Avaya or an authorized Avaya Channel Partner (as applicable) and which is described further in Hosted SAS or other service description documentation regarding the applicable hosted service. If You purchase a Hosted Service subscription, the foregoing limited warranty may not apply but You may be entitled to support services in connection with the Hosted Service as described further in your service description documents for the applicable Hosted Service. Contact Avaya or Avaya Channel Partner (as applicable) for more information.

#### **Hosted Service**

THE FOLLOWING APPLIES ONLY IF YOU PURCHASE AN AVAYA HOSTED SERVICE SUBSCRIPTION FROM AVAYA OR AN AVAYA CHANNEL PARTNER (AS APPLICABLE), THE TERMS OF USE FOR HOSTED SERVICES ARE AVAILABLE ON THE AVAYA WEBSITE, HTTPS://SUPPORT.AVAYA.COM/LICENSEINFO UNDER THE LINK "Avaya Terms of Use for Hosted Services" OR SUCH SUCCESSOR SITE AS DESIGNATED BY AVAYA, AND ARE APPLICABLE TO ANYONE WHO ACCESSES OR USES THE HOSTED SERVICE. BY ACCESSING OR USING THE HOSTED SERVICE, OR AUTHORIZING OTHERS TO DO SO, YOU, ON BEHALF OF YOURSELF AND THE ENTITY FOR WHOM YOU ARE DOING SO (HEREINAFTER REFERRED TO INTERCHANGEABLY AS "YOU" AND "END USER"), AGREE TO THE TERMS OF USE. IF YOU ARE ACCEPTING THE TERMS OF USE ON BEHALF A COMPANY OR OTHER LEGAL ENTITY, YOU REPRESENT THAT YOU HAVE THE AUTHORITY TO BIND SUCH ENTITY TO THESE TERMS OF USE. IF YOU DO NOT HAVE SUCH AUTHORITY, OR IF YOU DO NOT WISH TO ACCEPT THESE TERMS OF USE, YOU MUST NOT ACCESS OR USE THE HOSTED SERVICE OR AUTHORIZE ANYONE TO ACCESS OR USE THE HOSTED SERVICE.

#### Licenses

THE SOFTWARE LICENSE TERMS AVAILABLE ON THE AVAYA WEBSITE, HTTPS://SUPPORT.AVAYA.COM/LICENSEINFO UNDER THE LINK "AVAYA SOFTWARE LICENSE TERMS (Avaya Products)" OR SUCH SUCCESSOR SITE AS DESIGNATED BY AVAYA, ARE APPLICABLE TO ANYONE WHO DOWNLOADS, USES AND/OR INSTALLS AVAYA SOFTWARE, PURCHASED FROM AVAYA INC., ANY AVAYA AFFILIATE, OR AN AVAYA CHANNEL PARTNER (AS APPLICABLE) UNDER A COMMERCIAL AGREEMENT WITH AVAYA OR AN AVAYA CHANNEL PARTNER. UNLESS OTHERWISE AGREED TO BY AVAYA IN WRITING AVAYA DOES NOT EXTEND THIS LICENSE IF THE SOFTWARE WAS OBTAINED FROM ANYONE OTHER THAN AVAYA, AN AVAYA AFFILIATE OR AN AVAYA CHANNEL PARTNER; AVAYA RESERVES THE RIGHT TO TAKE LEGAL ACTION AGAINST YOU AND ANYONE ELSE USING OR SELLING THE SOFTWARE WITHOUT A LICENSE. BY INSTALLING, DOWNLOADING OR USING THE SOFTWARE, OR AUTHORIZING OTHERS TO DO SO, YOU, ON BEHALF OF YOURSELF AND THE ENTITY FOR WHOM YOU ARE INSTALLING, DOWNLOADING OR USING THE SOFTWARE (HEREINAFTER REFERRED TO INTERCHANGEABLY AS "YOU" AND "END USER"), AGREE TO THESE TERMS AND CONDITIONS AND CREATE A BINDING CONTRACT BETWEEN YOU AND AVAYA INC. OR THE APPLICABLE AVAYA AFFILIATE ("AVAYA").

Avaya grants You a license within the scope of the license types described below, with the exception of Heritage Nortel Software, for which the scope of the license is detailed below. Where the order documentation does not expressly identify a license type, the applicable license will be a Designated System License as set forth below in the Designated System(s) License (DS) section as applicable. The applicable number of licenses and units of capacity for which the license is granted will be one (1), unless a different number of licenses or units of capacity is specified in the documentation or other materials available to You. "Software" means computer programs in object code, provided by Avaya or an Avaya Channel Partner, whether as stand-alone products, pre-installed on hardware products, and any upgrades, updates, patches, bug fixes, or modified versions thereto. "Designated Processor" means a single stand-alone computing device. "Server" means a set of Designated Processors that hosts (physically or virtually) a software application to be accessed by multiple users. "Instance" means a single copy of the Software executing at a particular time: (i) on one physical machine; or (ii) on one deployed software virtual machine ("VM") or similar deployment.

#### License type(s)

Designated System(s) License (DS). End User may install and use each copy or an Instance of the Software only: 1) on a number of Designated Processors up to the number indicated in the order; or 2) up to the number of Instances of the Software as indicated in the order, Documentation, or as authorized by Avaya in writing. Avaya may require the Designated Processor(s) to be identified in the order by type, serial number, feature key, Instance, location or other specific designation, or to be provided by End User to Avaya through electronic means established by Avaya specifically for this purpose.

Concurrent User License (CU). End User may install and use the Software on multiple Designated Processors or one or more Servers, so long as only the licensed number of Units are accessing and using the Software at any given time as indicated in the order, Documentation, or as authorized by Avaya in writing. A "Unit" means the unit on which Avaya, at its sole discretion, bases the pricing of its licenses and can be, without limitation, an agent, port or user, an email or voice mail account in the name of a person or corporate function (e.g., webmaster or helpdesk), or a directory entry in the administrative database utilized by the Software that permits one user to interface with the Software. Units may be linked to a specific, identified Server or an Instance of the Software.

Cluster License (CL). End User may install and use each copy or an Instance of the Software only up to the number of Clusters as indicated on the order, Documentation, or as authorized by Avaya in writing with a default of one (1) Cluster if not stated.

Enterprise License (EN). End User may install and use each copy or an Instance of the Software only for enterprise-wide use of an unlimited number of Instances of the Software as indicated on the order, Documentation, or as authorized by Avaya in writing.

Named User License (NU). End User may: (i) install and use each copy or Instance of the Software on a single Designated Processor or Server per authorized Named User (defined below); or (ii) install and use each copy or Instance of the Software on a Server so long as only authorized Named Users access and use the Software as indicated in the order, Documentation, or as authorized by Avaya in writing. "Named User", means a user or device that has been expressly authorized by Avaya to access and use the Software. At Avaya's sole discretion, a "Named User" may be, without limitation, designated by name, corporate function (e.g., webmaster or helpdesk), an e-mail or voice mail account in the name of a person or corporate function, or a directory entry in the administrative database utilized by the Software that permits one user to interface with the Software.

Shrinkwrap License (SR). End User may install and use the Software in accordance with the terms and conditions of the applicable license agreements, such as "shrinkwrap" or "clickthrough" license accompanying or applicable to the Software ("Shrinkwrap License") as indicated in the order, Documentation, or as authorized by Avaya in writing.

Transaction License (TR). End User may use the Software up to the number of Transactions as specified during a specified time period and as indicated in the order, Documentation, or as authorized by Avaya in writing. A "Transaction" means the unit by which Avaya, at its sole discretion, bases the pricing of its licensing and can be, without limitation, measured by the usage, access, interaction (between client/server or customer/organization), or operation of the Software within a specified time period (e.g. per hour, per day, per month). Some examples of Transactions include but are not limited to each greeting played/message waiting enabled, each personalized promotion (in any channel), each callback operation, each live agent or web chat session, each call routed or redirected (in any channel). End User may not exceed the number of Transactions without Avaya's prior consent and payment of an additional fee.

#### **Heritage Nortel Software**

"Heritage Nortel Software" means the software that was acquired by Avaya as part of its purchase of the Nortel Enterprise Solutions Business in December 2009. The Heritage Nortel Software is the software contained within the list of Heritage Nortel Products located at <a href="https://support.avaya.com/LicenseInfo">https://support.avaya.com/LicenseInfo</a> under the link "Heritage Nortel Products" or such successor site as designated by Avaya. For Heritage Nortel Software, Avaya grants Customer a license to use Heritage Nortel Software provided hereunder solely to the extent of the authorized activation or authorized usage level, solely for the purpose specified in the Documentation, and solely as embedded in, for execution on, or for communication with Avaya equipment. Charges for Heritage Nortel Software may be based on extent of activation or use authorized as specified in an order or invoice.

#### Copyright

Except where expressly stated otherwise, no use should be made of materials on this site, the Documentation, Software, Hosted Service, or hardware provided by Avaya. All content on this site, the documentation, Hosted Service, and the product provided by Avaya including the selection, arrangement and design of the content is owned either by Avaya or its licensors and is protected by copyright and other intellectual property laws including the sui generis rights relating to the protection of databases. You may not modify, copy, reproduce, republish, upload, post, transmit or distribute in any way any content, in whole or in part, including any code and software unless expressly authorized by Avaya. Unauthorized reproduction, transmission, dissemination, storage, and or use without the express written consent of Avaya can be a criminal, as well as a civil offense under the applicable law.

### Virtualization

The following applies if the product is deployed on a virtual machine. Each product has its own ordering code and license types. Unless otherwise stated, each Instance of a product must be separately licensed and ordered. For example, if the end user customer or Avaya Channel Partner would like to install two Instances of the

same type of products, then two products of that type must be ordered

#### Third Party Components

"Third Party Components" mean certain software programs or portions thereof included in the Software or Hosted Service may contain software (including open source software) distributed under third party agreements ("Third Party Components"), which contain terms regarding the rights to use certain portions of the Software ("Third Party Terms"). As required, information regarding distributed Linux OS source code (for those products that have distributed Linux OS source code) and identifying the copyright holders of the Third Party Components and the Third Party Terms that apply is available in the products, Documentation or on Avaya's website at: https:// support.avaya.com/Copyright or such successor site as designated by Avaya. The open source software license terms provided as Third Party Terms are consistent with the license rights granted in these Software License Terms, and may contain additional rights benefiting You, such as modification and distribution of the open source software. The Third Party Terms shall take precedence over these Software License Terms, solely with respect to the applicable Third Party Components to the extent that these Software License Terms impose greater restrictions on You than the applicable Third Party Terms.

The following applies only if the H.264 (AVC) codec is distributed with the product. THIS PRODUCT IS LICENSED UNDER THE AVC PATENT PORTFOLIO LICENSE FOR THE PERSONAL USE OF A CONSUMER OR OTHER USES IN WHICH IT DOES NOT RECEIVE REMUNERATION TO (i) ENCODE VIDEO IN COMPLIANCE WITH THE AVC STANDARD ("AVC VIDEO") AND/OR (ii) DECODE AVC VIDEO THAT WAS ENCODED BY A CONSUMER ENGAGED IN A PERSONAL ACTIVITY AND/OR WAS OBTAINED FROM A VIDEO PROVIDER LICENSED TO PROVIDE AVC VIDEO. NO LICENSE IS GRANTED OR SHALL BE IMPLIED FOR ANY OTHER USE. ADDITIONAL INFORMATION MAY BE OBTAINED FROM MPEG LA, L.L.C. SEE HTTP://WWW.MPEGLA.COM.

#### Service Provider

THE FOLLOWING APPLIES TO AVAYA CHANNEL PARTNER'S HOSTING OF AVAYA PRODUCTS OR SERVICES. THE PRODUCT OR HOSTED SERVICE MAY USE THIRD PARTY COMPONENTS SUBJECT TO THIRD PARTY TERMS AND REQUIRE A SERVICE PROVIDER TO BE INDEPENDENTLY LICENSED DIRECTLY FROM THE THIRD PARTY SUPPLIER. AN AVAYA CHANNEL PARTNER'S HOSTING OF AVAYA PRODUCTS MUST BE AUTHORIZED IN WRITING BY AVAYA AND IF THOSE HOSTED PRODUCTS USE OR EMBED CERTAIN THIRD PARTY SOFTWARE, INCLUDING BUT NOT LIMITED TO MICROSOFT SOFTWARE OR CODECS, THE AVAYA CHANNEL PARTNER IS REQUIRED TO INDEPENDENTLY OBTAIN ANY APPLICABLE LICENSE AGREEMENTS, AT THE AVAYA CHANNEL PARTNER'S EXPENSE, DIRECTLY FROM THE APPLICABLE THIRD PARTY SUPPLIER.

WITH RESPECT TO CODECS, IF THE AVAYA CHANNEL PARTNER IS HOSTING ANY PRODUCTS THAT USE OR EMBED THE H.264 CODEC OR H.265 CODEC, THE AVAYA CHANNEL PARTNER ACKNOWLEDGES AND AGREES THE AVAYA CHANNEL PARTNER IS RESPONSIBLE FOR ANY AND ALL RELATED FEES AND/OR ROYALTIES. THE H.264 (AVC) CODEC IS LICENSED UNDER THE AVC PATENT PORTFOLIO LÍCENSE FOR THE PERSONAL USE OF A CONSUMER OR OTHER USES IN WHICH IT DOES NOT RECEIVE REMUNERATION TO: (I) ENCODE VIDEO IN COMPLIANCE WITH THE AVC STANDARD ("AVC VIDEO") AND/OR (II) DECODE AVC VIDEO THAT WAS ENCODED BY A CONSUMER ENGAGED IN A PERSONAL ACTIVITY AND/OR WAS OBTAINED FROM A VIDEO PROVIDER LICENSED TO PROVIDE AVC VIDEO. NO LICENSE IS GRANTED OR SHALL BE IMPLIED FOR ANY OTHER USE. ADDITIONAL INFORMATION FOR H.264 (AVC) AND H.265 (HEVC) CODECS MAY BE OBTAINED FROM MPEG LA, L.L.C. SEE HTTP:// WWW.MPEGLA.COM.

#### Compliance with Laws

You acknowledge and agree that it is Your responsibility for complying with any applicable laws and regulations, including, but not limited to laws and regulations related to call recording, data privacy, intellectual property, trade secret, fraud, and music performance rights, in the country or territory where the Avaya product is used.

#### **Preventing Toll Fraud**

"Toll Fraud" is the unauthorized use of your telecommunications system by an unauthorized party (for example, a person who is not a corporate employee, agent, subcontractor, or is not working on your company's behalf). Be aware that there can be a risk of Toll Fraud associated with your system and that, if Toll Fraud occurs, it can result in substantial additional charges for your telecommunications services

#### **Avaya Toll Fraud intervention**

If You suspect that You are being victimized by Toll Fraud and You need technical assistance or support, call Technical Service Center Toll Fraud Intervention Hotline at +1-800-643-2353 for the United States and Canada. For additional support telephone numbers, see the Avaya Support website: <a href="https://support.avaya.com">https://support.avaya.com</a> or such successor site as designated by Avaya.

#### **Security Vulnerabilities**

Information about Avaya's security support policies can be found in the Security Policies and Support section of <a href="https://support.avaya.com/security">https://support.avaya.com/security</a>.

Suspected Avaya product security vulnerabilities are handled per the Avaya Product Security Support Flow (https://support.avaya.com/css/P8/documents/100161515).

#### **Trademarks**

The trademarks, logos and service marks ("Marks") displayed in this site, the Documentation, Hosted Service(s), and product(s) provided by Avaya are the registered or unregistered Marks of Avaya, its affiliates, its licensors, its suppliers, or other third parties. Users are not permitted to use such Marks without prior written consent from Avaya or such third party which may own the Mark. Nothing contained in this site, the Documentation, Hosted Service(s) and product(s) should be construed as granting, by implication, estoppel, or otherwise, any license or right in and to the Marks without the express written permission of Avaya or the applicable third party.

Avaya is a registered trademark of Avaya Inc.

All non-Avaya trademarks are the property of their respective owners.

 $\mathsf{Linux}^{\$}$  is the registered trademark of Linus Torvalds in the U.S. and other countries.

### **Contents**

Chapter 1: Using IP Office SoftConsole	8
What's New	
Phone and computer requirements	8
Logging In	
Optional Login Setting	9
Changing the language	10
Supported languages	10
Chapter 2: Menus and Controls	11
The Console's Main Window	
Compact View	13
Call history view	13
BLF panel	14
The call detail panel	15
Status bar	17
Main menu bar	17
Toolbar buttons	18
Shortcut keys	19
Chapter 3: Handling Calls	23
Answering incoming calls	23
Transferring calls	24
Making unsupervised transfers	24
Transferring a call without answering it	25
Making a supervised transfer	25
Transferring calls to voice mail	26
Wait for transfer to a busy extension	27
Making calls	
Making calls using the Make Call screen	
Making calls using the Dial Pad	
Using BLF icons for speed dialing	
Dialing DTMF digits	
Putting calls on hold	
Parking and unparking calls	
Collecting parked calls	
Reclaiming calls	
Switching between call history and BLF/held calls panel display	
Monitoring queues	
Answering queued calls	
Adding call tag text	
Opening controlled doors	

### Contents

	Intruding on calls	35
	Sending text messages	36
	Sending instant messages	37
	Sending email	37
	Making a page call	38
	Recording calls	39
	Collecting your voicemail messages	39
Ch	apter 4: Conferencing	41
	Conferencing held calls	
	Viewing conferences	41
	Adding users to a conference	42
	Using the Conference Room Controls	42
	Using a Conference Room	43
	Changing conference room views	44
	Changing conference room icon arrangement	45
	Changing a user's status	45
Ch	apter 5: Using the Directory	46
	Using the Directory	
	Editing directory entry properties	48
	Adding or editing local directory entries	50
	Changing hunt group status	51
	Changing user status	52
	Changing user forwarding status	53
	Setting mobile twinning	54
	Follow Me behavior	55
	Forward Unconditional behavior	56
	Forward on Busy/No Answer behavior	57
Ch	apter 6: Using the Call History	59
	Viewing call history	59
	Making calls from the call history view	59
	Clearing the call history	60
Ch	apter 7: Configuring the Console Application	61
	Console settings	
	Customizing the console's appearance	
	Working with BLF groups	63
	Changing BLF panel view	
	Adding members to a BLF group	65
	Naming conference rooms	65
	Configuring the Directories Display	67
	Configuring the Console's Locale Directory Entries	68
	Entering door names	
	Configuring keyboard actions	
	Modifying keyboard shortcuts	71

Configuring park slots	73
Configuring park slots	
Configuring queue monitoring for hunt groups	75
Alarm setting field descriptions	77
General console settings	78
Enabling instant messaging	79
Chapter 8: Templates and profiles	81
Loading and saving a profile	
Editing a profile	
Creating a new template	82
Default templates	82
Chapter 9: Working with Administrator mode	84
Logging into administrator mode	84
Changing the administrator mode password	85
Chapter 10: Troubleshooting	86
Cannot use the Force Extension Status or Group Service Status features	86
Unanswered calls are not returned to the operator	86
Microsoft Outlook warning screen opens at Login	
Directory does not show Outlook contacts	87

# **Chapter 1: Using IP Office SoftConsole**

This manual covers the use of the IP Office SoftConsole application. This Windows application is intended for receptionists and operators. It provides features to support the manual handling and distribution of incoming calls.

### **Related links**

What's New on page 8

Phone and computer requirements on page 8

Logging In on page 9

Changing the language on page 10

### What's New

The following new features are supported in this release of IP Office SoftConsole:

• Call history retention period setting – Details of each call in the application's call history are now automatically deleted after a set number of days. The duration is set through the application's preferences. See General console settings on page 78.

### Related links

Using IP Office SoftConsole on page 8

### Phone and computer requirements

Ensure you meet the following requirements before using the console.

Sound and media

Sound and media files can be associated with calls. If you use this functionality, you must have a sound card and speakers set up on your computer.

Telephone support

You must have an extension to provide the speech path for calls. We recommend that you use the console with a phone that supports auto-answer. That applies to most Avaya desk phones.

 Auto-Answer Phones – On these phones, the console is able to make calls which are immediately connected to the phone in order to hear the call progress.

- Non Auto-Answer Phones On these phones, when making a call using the console, the system first calls you and only makes the outgoing call after you answer. This typically applies to:
  - Analog phones and most DECT/non–Avaya SIP phones do not support autoanswer.
  - Avaya telephony applications running on a PC or mobile phone.

The telephone system also supports users who can make and answer calls on multiple telephone devices simultaneously. This is not supported by the console. It will associate itself with one of the user's available telephone devices and only make/answer calls using that device. Where one of those devices is a desk phone on the telephone system, it will use that device.

### Logging In

### About this task

You must log in to use the console. The **Login** window contains details that enable the console to communicate with the telephone system.

### **Procedure**

- 1. Click SoftConsole.
- 2. In the **Login** window, do the following:
  - a. Enter your case sensitive user name or extension number.
  - b. Enter your user password.
  - c. Enter the name or IP address of the telephone system.
    - If you installed the application from a download from web manager or self-administration, the name should have been automatically added.
  - d. Select the **Use secure communications** check box to enable secure communication between the console and the telephone system.
- 3. To set additional options before you log in, click **Expand**. See Optional Login Setting on page 9
- 4. To log in, click **OK**.

### **Optional Login Setting**

The following additional settings are displayed on the login menu if you click **Expand**.

### **Profile settings**

Whilst using the console, you can rearrange the windows displayed and other settings such as the console language. When you logout, you will be prompted to save any changes as a profile.

In addition, your system administrator can create a set of default templates.

The **Profiles** setting on the login menu allows you to select and reapply the settings of a default or previously saved profile.

### **Telephony options**

The following describes the check boxes in the **Telephony** section.

Option	Description
Call waiting	When selected, the system provides a call waiting tone when you are on a call and another incoming call arrives. When you end the current call, the new call is immediately presented to you. This option is ignored if you have multiple call appearances on your telephone.
Off-hook station	When selected, this option enables receptions to use the hands-free features on their telephones. The console controls the operation of the telephone. You should only deselect this option if you have an analog telephone where you answer or end calls using the handset.
Show templates	When selected, the default console templates are included in the list of profiles.

# Changing the language

### **About this task**

Use the following procedure to set or change the console application language.

### **Procedure**

- 1. Select View > Languages.
- 2. Select the required language.
- 3. Click  $\blacksquare$  to save the change as part of your profile.

#### Related links

<u>Using IP Office SoftConsole</u> on page 8 <u>Supported languages</u> on page 10

### **Supported languages**

The console supports the following languages:

• Brazilian, Chinese, Danish, Dutch, English UK, English US, Finnish, French, German, Italian, Korean, Japanese, Latin Spanish, Norwegian, Portuguese, Russian, Swedish.

# **Chapter 2: Menus and Controls**

This section provides an overview of the menus and controls available within the application.

### Related links

The Console's Main Window on page 11

Compact View on page 13

Call history view on page 13

**BLF** panel on page 14

The call detail panel on page 15

Status bar on page 17

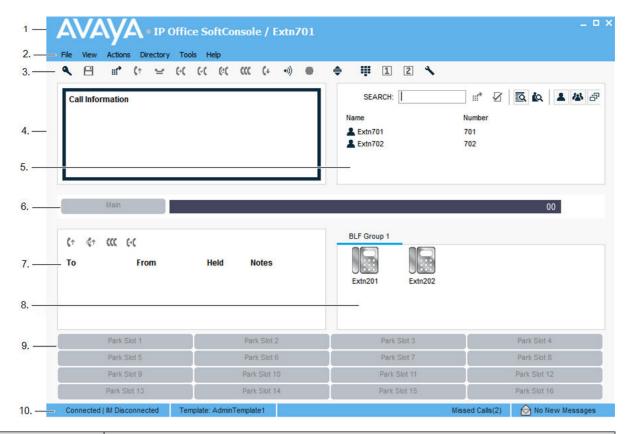
Main menu bar on page 17

Toolbar buttons on page 18

Shortcut keys on page 19

### The Console's Main Window

In normal view mode, the screen is divided into the possible areas shown in the following image. The profile or template you select when logging in sets whether held calls, BLF, and park slots are shown.



Option	Description
1. Title bar	Contains the name of the logged in person. By default, the title bar appears in the following colors:
	Red when the console is the active program.
	Grey if the console is not the active program.
2. Menu bar	Commands and actions are available through menus. Some items are only accessible when the right conditions occur, such as a ringing call.
3. Toolbar	Provides shortcuts for options that are frequently used. The toolbar can be shown or hidden using the <b>View</b> menu.
4. Call details panel	Contains a side-by-side display of current call information. The panel on the left contains details of the current or alerting call.
5. Directory panel	The panel on the right contains the directory and individual extension details. The panel on the right can also contain a script file or conferencing details.
6. Queue panel	Displays graphical information on the status of calls held in queues.
7. Held calls panel	Lists call that are on hold.
8. BLF panel	Displays icons that represent numbers you can dial. If the icons represent internal users, the user status is indicated.
9. Park slots panel	Contains up to 16 <b>Park Slot</b> buttons.

Table continues...

Option	Description
10. Status bar	Confirms that you are connected to the telephone system and the profile that you are using. The bar also displays the number of new messages and missed calls.
11. Call history panel	Shows a list of recent incoming, outgoing, and missed calls. When selected, the call history replaces the Held calls and BLF panels.

# **Compact View**

You can run the console in normal or compact view modes. In compact mode, only call details and directory panels appear.



### **Procedure**

- 1. To toggle between compact and normal view, do one of the following actions:
  - Click \( \bigsige \).
  - Click View > Compact or Normal View
- 2. Press Home on your keyboard to toggle between compact and normal view.

### Related links

Menus and Controls on page 11

# **Call history view**

You can switch between displaying the call history and the BLF/held calls panels. The call history displays details of calls made and received by the console.



The panel is divided into the following tabs:

Name	Description
In	Lists all calls received at your extension.
Out	Lists all calls made from your extension.
Missed	Lists all unanswered calls to your extension.
All	Lists all incoming, outgoing, and missed calls.

Each tab displays a maximum of 100 calls. When the maximum capacity is reached, the oldest record is deleted to add a new record. The number in brackets shows the number of calls listed.

Within each tab, there are the following call status icons and information:

Name	Description
Out (()	Indicates a call that was made from your extension.
In ( <b>&gt;)</b> )	Indicates a call that was made to your extension.
Missed calls (▮)	Indicates a call that was not answered.
Number	Either the incoming telephone number or the telephone number that was called.
From	The name that is associated with the number in the directory on the main system or your local console directory.
То	The name that is associated with the called number in the directory on the main system or your local console directory.
Tag	Text that was entered to identify the call.
Date	The date and time that the call occurred.
Time	

# **BLF** panel

The Busy Lamp Field (BLF) panel displays named icons that represent dialable numbers. If the icon is for an internal user, the user's status is indicated.



The panel uses tabs to group different sets of user icons. You can switch between the groups by clicking the tab name.

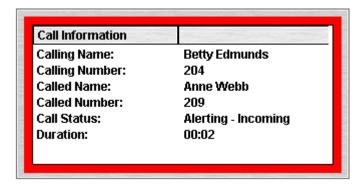
The icons used for users are:

Icon	Name	Description
	Unread Voice mail Messages	A yellow envelope indicates that the user has unread voice mail messages. The number of messages appear in brackets.
	User Busy	A red circle with white cross indicates the user is busy.
	Forwarding All	A green circle with a white arrow indicates that all calls to the user are currently being forwarded.
	Do Not Disturb	A blue circle with white cross indicates that the user has Do Not Disturb switched on.

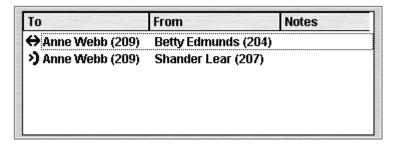
# The call detail panel

The call detailspanel contains a side-by-side display of current call information. A slider positioned between the two panels allows you to adjust the size of the panels as required.

The panel on the left contains details about the current calls. When a single call is in progress, either ringing or connected, the panel contains details for that call.



If you have multiple call appearances set, additional calls are shown when they arrive. Clicking the separate calls has the same effect as pressing the matching call appearance buttons on the telephone: The selected call is answered, and previously connected calls are automatically put on hold.

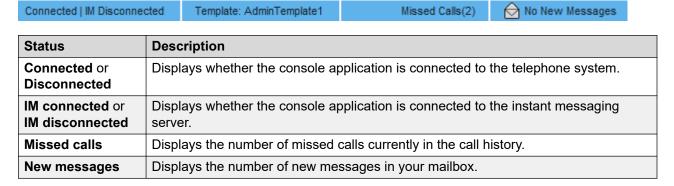


The following details can be shown for a single call:

Call detail	Description	
Calling name	The name associated with the calling number. For external calls, this can be a name obtained from a calling number match with the telephone system directory.	
Calling number	The telephone number of the caller, if available.	
Called name	The name associated with the called number.	
Called number	The extension number to which the telephone system routed the incoming call.	
Call status	The progress of the call. The border around the panel changes color to indicate the status of a call. The following default colors are associated with call status:	
	Red: Alerting incoming or outgoing call.	
	Green: Connected call, or call still being dialed.	
	Yellow: Returned or timed out call. For example, a held call that has timed out from hold.	
	Black: Idle state.	
Duration	The length of time that the call is in its current state. Examples of states include ringing, connected, or held.	
Notes	Displays notes or information about the call, including any annotations that are added. For example, when a call returns, the reason for the return is shown.	

### Status bar

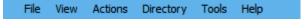
The status bar confirms that you are connected to the telephone system and the profile that you are using. An indicator also displays the number of new messages and missed calls that you have.



### Main menu bar

The main menu bar is at the top of the screen. You can open each menu using the following methods:

- Clicking the **Menu** button.
- Pressing Alt and the underlined letter for the required menu on your keyboard. For example, press Alt + A to open the menu.



Menu option	Description	
File	You can do the following:	
	Save the current application setup as a personal profile.	
	Log in with a different profile.	
	Exit the application.	
View	You can run the application in normal or compact mode, and you can choose to view call history. You can also select the display language and whether to show or hide the toolbar.	
	If you are in Administrator mode, you can also choose to show or hide the BLF, held calls, and park slot panels.	
Actions	This menu contains actions for call handling. Those that are unavailable are not applicable to the current call situation. Keyboard shortcuts for the functions are also shown in this menu.	

Table continues...

Menu option	Description
Directory	You can view, search, export, and set up the directory.
Tools	You can use this menu to access other menus for various functions.
Help	This menu provides access to the help system and details about the console.

### **Toolbar buttons**

### Main toolbar

You can show or hide the main toolbar by selecting **View > Toolbar**. The main toolbar contains the following buttons:

Image	Name
٩	Login
e	Save Profile
::( <b>,</b>	Make call
<b>(</b> ↑	Answer
$\succeq$	Hold
ec	Transfer
6(	Transfer complete
@C	Reattempt transfer
ccc	Conference
(1	Hang up
•)))	Page
	Record Call
<b>\$</b>	Compact View
<b>#</b>	Dial pad
1	Conference room 2
2	Conference room 2
*	Preferences

### **Directory buttons**

The buttons across the top of the directory are used as follows:

Image	Description
#P	Make a call to the selected directory entry.
<b>2</b>	Edit the properties of the selected directory entry.
₫	Use the directory panel to view directory entries.
ia	Use the directory panel to view conferences being hosted by the telephone system.
1	Show or hide telephone system users in the directory panel.
<b>14</b> 3	Show or hide telephone system hunt groups in the directory panel.
否	Show or hide telephone numbers from the telephone system directory, local console directory, and Outlook. You can:
	Select which directories are included with the <b>Directories</b> tab.
	Edit the local console directory with the <b>Incoming Calls</b> tab.

### Held calls panel buttons

Image	Description
<b>(</b> ↑	Answer the selected held call.
₫↑	Answer the longest held call.
ccc	Conference the held calls.
<b>(-(</b>	Transfer the selected held call.

# **Shortcut keys**

The following tables list the default shortcut keys. You can adjust these assignments through the console configuration menus.

### **Call control shortcuts**

Shortcut key	Description
Ctrl + A	Alternate calls
F11	Annotate call
Enter	Answer call
F12	Make new call
End	Hang up
F4	Hold call
F7	Hold the current call and auto answer next call
Ctrl + B	Hold the current call against a busy extension

Table continues...

Shortcut key	Description
F9	Intrude
F10	Page
F6	Reclaim call
F5	Record call
F2	Transfer call
Ctrl + T	Transfer complete
Ctrl + R	Reattempt the transfer of a returned call
F3	Transfer to voice mail
Shift + Ctrl + F10	Add to conference
Shift + Ctrl + F11	Add to conference room 1
Shift + Ctrl+ F12	Add to conference room 2

### **Application hot keys**

Shortcut key	Description
Pause	Restore application
Home	Switch between normal view and compact view

### **BLF** shortcuts

Shortcut key	Description
Ctrl + Alt + C	Call selected BLF group member
Ctrl + Alt + G	BLF large icon view
Ctrl + Alt + S	BLF small icon view
Ctrl + Alt + I	BLF list view
Ctrl + Alt + D	BLF details view
Ctrl + Alt + N	Arrange BLF icons by name
Ctrl + Alt + M	Arrange BLF icons by number
Ctrl + Alt + U	Arrange BLF icons by status
Ctrl + Alt + H	Arrange BLF icons horizontally
Ctrl + Alt + V	Arrange BLF icons vertically
Ctrl + Alt + R	Create new BLF group
Ctrl + Alt + B	Create new BLF group member
Ctrl + Alt + P	Edit BLF group/member properties

### **Directory shortcuts**

Shortcut key	Description
Ctrl + S	New directory search
Ctrl + C	Call selected directory entry
Ctrl + P	Display properties of selected entry
Shift + Enter	Display search item details of selected entry
Ctrl + E	Send email to selected user
Ctrl + M	Send text message to selected user
Ctrl + I	Send instant message to selected user
Ctrl + Y	Directory view
Ctrl + F	Conference view
Ctrl + U	Show/hide user entries
Ctrl + G	Show/hide group entries
Ctrl + D	Show/hide directory entries

### **Held calls shortcuts**

Shortcut key	Description
Ctrl + Alt + A	Answer held call
Ctrl + Alt + L	Answer longest held call
F8	Conference with held calls
Ctrl + Alt + T	Transfer held call
Ctrl + Alt + P	Edit BLF group/member properties

### **Queue mode shortcuts**

Shortcut key	Description
Shift + F1	Pickup call from queue 1
Shift + F2	Pickup call from queue 2
Shift + F3	Pickup call from queue 3
Shift + F4	Pickup call from queue 4
Shift + F5	Pickup call from queue 5
Shift + F6	Pickup call from queue 6
Shift + F7	Pickup call from queue 7
Shift + F8	Pickup call from queue 8

### **Tool shortcuts**

Shortcut key	Description
Shift + Ctrl + F4	Conference room 1
Shift + Ctrl + F5	Conference room 2
Shift + Ctrl + F1	Release door 1
Shift + Ctrl + F2	Release door 2
Shift + Ctrl + F3	Dial pad
Ctrl + V	Call voice mail

### Park slot shortcuts

Shortcut key	Description
Alt + F1	Pack/unpark call in park slot 1
Alt + F2	Pack/unpark call in park slot 2
Alt + F3	Pack/unpark call in park slot 3
Alt + F4	Pack/unpark call in park slot 4
Alt + F5	Pack/unpark call in park slot 5
Alt + F6	Pack/unpark call in park slot 6
Alt + F7	Pack/unpark call in park slot 7
Alt + F8	Pack/unpark call in park slot 8
Alt + F9	Pack/unpark call in park slot 9
Alt + F10	Pack/unpark call in park slot 10
Alt + F11	Pack/unpark call in park slot 11
Alt + F12	Pack/unpark call in park slot 12
Shift + F9	Pack/unpark call in park slot 13
Shift + F10	Pack/unpark call in park slot 14
Shift + F11	Pack/unpark call in park slot 15
Shift + F12	Pack/unpark call in park slot 16

### Related links

Menus and Controls on page 11

# **Chapter 3: Handling Calls**

This section covers the main call handling controls provided by the application.

#### Related links

Answering incoming calls on page 23

Transferring calls on page 24

Making calls on page 27

Dialing DTMF digits on page 30

Putting calls on hold on page 30

Parking and unparking calls on page 31

Collecting parked calls on page 32

Reclaiming calls on page 32

Switching between call history and BLF/held calls panel display on page 32

Monitoring queues on page 33

Adding call tag text on page 34

Opening controlled doors on page 35

Intruding on calls on page 35

Sending text messages on page 36

Sending instant messages on page 37

Sending email on page 37

Making a page call on page 38

Recording calls on page 39

Collecting your voicemail messages on page 39

# **Answering incoming calls**

### About this task

When an incoming call is received, the **Call** panel is outlined in red and displays information about the caller. If a script file is associated with the incoming number, the script is shown in the right call panel.



#### **Procedure**

- 1. To answer a call, do one of the following:
  - Press Enter.
  - Click (↑.
  - Click Actions > Answer.
  - Pick up the handset if using your telephone.
  - Double-click in the Call panel.

When a call is answered, the caller information is outlined in green.

2. If a script is showing, to remove it, click Close Script or press Enter again.

### **Related links**

Handling Calls on page 23

# **Transferring calls**

One of the main roles of the console is transferring callers to their required destination.

### Related links

Handling Calls on page 23

Transferring a call without answering it on page 25

Making a supervised transfer on page 25

Transferring calls to voice mail on page 26

Wait for transfer to a busy extension on page 27

### Making unsupervised transfers

An unsupervised transfer is one where you transfer the call without speaking to the transfer destination or wait to see if they answer.

### **Procedure**

Use one of the following methods for transferring a call:

- Press F2. Select the transfer destination and click **Dial** (Ctrl + D).
- Click Actions > Transfer Call. Select the transfer destination and click Dial (Ctrl + D).
- Drag and drop the call onto the extension within the directory panel.
- Drag and drop the call onto the required BLF.

### Transferring a call without answering it

If you recognize a caller's name or number, you can transfer the call without answering it first. Transferring a call in this way is called an unsupervised transfer. Your configuration can be set to have unanswered calls returned. When a call is returned, **(NoAns)** is shown in the call details panel.

### **Procedure**

- 1. Enter the destination extension number in the **Search** field.
- 2. Click on the match required and then click ♠ (. Alternatively, when down to a single search match, click on ♠ (.

The incoming call is transferred to the destination extension and cleared from the screen.

### Related links

Transferring calls on page 24

### Making a supervised transfer

A supervised transfer is one where you consult with the transfer destination to check that they answer and that they will accept the call before transferring the caller.

#### **Procedure**

- 1. Enter the extension number or user name in the directory **Search** field.
- 2. If the target extension is free, either click in the directory panel or press F12. The progress of the outgoing call can be heard. The original call is put on hold.
  - If the incoming call is accepted for transfer, click ( or press Ctrl + T to complete the transfer.
  - If the user does not want to receive the incoming call, click **(↓** or press Endto end the consultation call. You can return to the original caller by taken them off of hold.
- 3. If the target extension is busy, you can ask the caller if they want to wait. See Wait for a transfer to busy.

### **Related links**

Transferring calls on page 24

### Transferring calls to voice mail

If the caller wants to leave a message, you can transfer the them direct to a user or group's voice mail.

### **Procedure**

1. Press F3 or click Actions > Voicemail Transfer.



2. Select the directory required.

You can also select the **Show Hunt Groups** and **Show Users** radio buttons.

- 3. Start entering the name into the **Name** field.
- 4. Click **Voicemail** when the extension number appears in the **Number** field.

You can also select the extension number from the directory panel and then press F3.

### **Related links**

Transferring calls on page 24

### Wait for transfer to a busy extension

### About this task

If the extension to which you want to transfer a call is shown as busy by the console, you can queue the call to wait for transfer when the extension becomes free. This avoids the transfer call being sent to voicemail or following the target's forward on busy setting.

This process parks the call on the system using the park ID of the target extension, that is, its extension number plus a single digit between 0 to 9.

#### **Procedure**

- 1. If you haven't already, answer the incoming call.
- Ask if they would like to wait until the transfer target is no longer busy.
- 3. If they agree, press Ctrl + B. Their call is queued to wait until the transfer extension is free.
- 4. When the transfer extension becomes free, the call returns to the console with a yellow border. The text indicates why the call has returned. In the call details, scroll down to Reason:
  - **Timeout** If the call waits longer that the phone system's park timeout (the default is 5 minutes), it recalls to your. Answer the call. If they still want to wait, press Ctrl + B to park the call again.
  - Free The transfer target is now able to take another call. Answer the call to do a normal supervised or unsupervised transfer or you can use Ctrl+R to do an immediate unsupervised transfer without answering the call.

### **Related links**

Transferring calls on page 24

### Making calls

### **Procedure**

Use one of the following methods to make a call:

- · Dial from your telephone.
- Double-click on a specific BLF to speed dial the associated number.
- Locate and select a directory entry and then click \*\* or press F12.
- Click \*\*\* or press F12 to display the Make Call screen.

#### Related links

Handling Calls on page 23

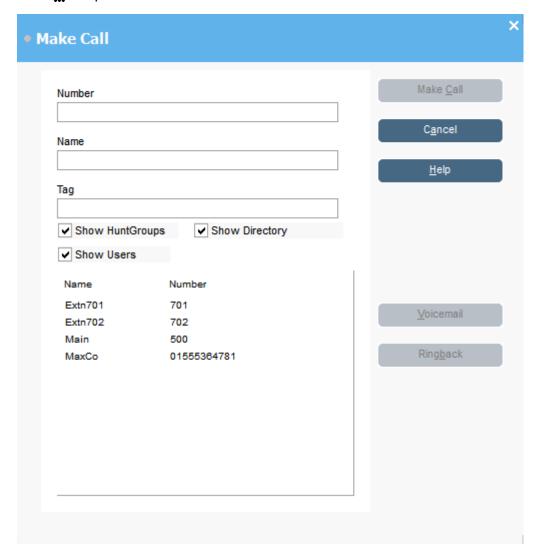
Making calls using the Make Call screen on page 28

Making calls using the Dial Pad on page 29
Using BLF icons for speed dialing on page 30

### Making calls using the Make Call screen

### **Procedure**

1. Click \*\*\* or press F12.



- 2. Select the directory that you want to search. You can select more than one directory.
- 3. Start typing the name in the **Name** field.

The entries that match the text you entered are displayed. When the required number appears in the list, click it once. The number is transferred to the **Number** field. When there is only one match, the number is automatically transferred to the **Number** field.

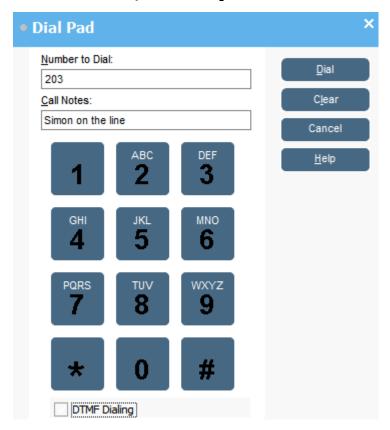
- 4. Enter a tag message if required.
- 5. Select the required action:

Option	Description
Make call	Place a call on the selected number.
Voicemail	Leave a message for the user.
Ringback	When an extension number is busy, click <b>Ringback</b> . When the extension becomes free, it rings your extension.

### Making calls using the Dial Pad

### **Procedure**

1. Click Tools > Dial pad or click **■**.



2. Enter the required telephone number into the **Number to Dial** field.

Use the dial characters on the **Dial pad** or the keyboard.

- 3. Enter any notes for the call in the Call Notes area.
  - Use call notes to add call tag text.
- 4. Click **Dial** to start the call.

### Using BLF icons for speed dialing

### **Procedure**

Double-click on the required icon or right-click and select Call.

### Related links

Making calls on page 27

### **Dialing DTMF digits**

### About this task

You can use the console's dial pad to dial DTMF digits during a call.

### **Procedure**

- 2. Select DTMF Dialing.

Any digits you now dial are sent to the currently connected call as DTMF digits.

### Related links

Handling Calls on page 23

# Putting calls on hold

### **About this task**

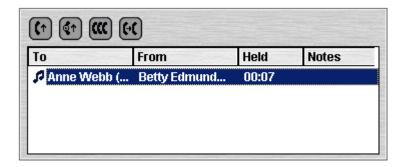
Put a call on hold so that you can perform another task.

### **Procedure**

1. Click wor press F4.

To put the current call on hold and answer the next call in one action, press F7.

The Held Calls Panel contains a list of all the held calls.



- 2. Sort the list by clicking the corresponding column header.
- 3. Click a row in the list to select the call to answer or transfer.
- 4. Use the icons at the top of the panel as required.

#### Related links

Handling Calls on page 23

# Parking and unparking calls

### About this task

You can park a call to handle other tasks. For example, an incoming caller needs to speak to someone urgently but that person is not available. You can park the call in slot 1 and page the person you want to speak to and tell them to pick up the call on slot 1.

Calls remain parked for a specific length of time before returning to the operator. For more information on park time, contact your system administrator.

There are 16 park slots available. When a call is parked in one of the slots, the button label provides information about the call. When a park slot is vacant, the button label shows the park slot number. All operators can see when the call is picked up or ended. Anyone can answer a parked call.

### **Procedure**

1. To park a call, while connected to the call, click on a vacant **Park Slot** button to park the call in that slot.

The parked call displays information regarding the call, for example, the source number of the call.

2. To unpark a call, when a call is parked in a park slot, click the relevant **Park Slot** button to unpark the call.

### Related links

Handling Calls on page 23

### Collecting parked calls

### About this task

When you park a call, anyone who knows the slot number can pick up the call.

#### **Procedure**

To pick up a parked call, do one of the following:

- Dial the default short code \*38 **N#** replacing the *N* with the park slot number.
- If console users have a park slot button set to the same park slot number, the button indicates the parked call. They can click the button to unpark the call.
- On Avaya telephones with programmable buttons, users can program buttons to match
  particular park slot numbers. The button indicates when a call is parked in that park slot and
  can be pressed to unpark the call.

### Related links

Handling Calls on page 23

### Reclaiming calls

### About this task

You can attempt to reclaim the last incoming call presented to the console including calls that rang but were then answered elsewhere. Reclaim calls if you suspect a call was transferred to the wrong number or is still ringing unanswered.

When working in a group of console users, the reclaim function may reclaim a call that was presented to you but then answered by one of the other users.

#### **Procedure**

Press F6 or click Actions > Reclaim Call.

#### Related links

Handling Calls on page 23

# Switching between call history and BLF/held calls panel display

### About this task

You may be able to switch between displaying either the console's call history or its BLF and held calls panels.

### **Procedure**

Click View > Call History. Related links

Handling Calls on page 23

### **Monitoring queues**

### About this task

Hunt groups can be configured with queuing. When there are more calls waiting to be answered than agents available to answer, the additional calls are put into a queue. You can configure your console to monitor up to 8 hunt group queues.

The number of calls held in a queue is indicated by a bar graph.



The total number of calls is shown at the end of the bar graph. Each call is shown as a white box if the alarm threshold has not been exceeded. If the number of calls in the queue exceeds the alarm threshold, the calls exceeding the threshold are shown as an amber box.

The longest length of time a call is in the queue is indicated in the text box at the end of the graph. The time is updated whenever a call is queued. The time is shown in white if the longest wait time alarm threshold has not been exceeded. The time changes to being amber if the longest wait time is exceeded.

### **Procedure**

Move the mouse pointer over an active Queue Call bar to show information about the queue.

The following information appears:

- Queue Name
- Calls in Queue
- Recall Calls
- Status

#### Related links

Handling Calls on page 23

Answering queued calls on page 34

### **Answering queued calls**

### About this task

Any console operator can answer queued calls. You do not have to be a member of the hunt group to answer the call.

### **Procedure**

- Click the Queue Name button or press Shift + F1 to Shift + F8.
   The first call in the queue is presented to you.
- 2. Answer the call in the normal way.

### Related links

Monitoring queues on page 33

# Adding call tag text

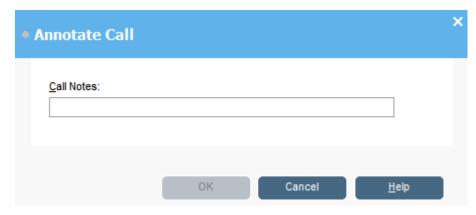
### About this task

A short text string can added to any call. This feature is called call tagging. The text remains with the call when it is transferred and appears on the display of internal phones receiving the call. The text is also recorded within the call history.

Using the console, you can add a call tag when making or transferring a call. In addition, using the process below, you can add a call tag while connect to the call.

### **Procedure**

1. When making or transferring a call, click **Actions > Annotate Call** or press F11.



2. Enter notes in the Call Notes field.

Use alphanumeric characters excluding commas.

By default the text length is up to 16 characters, however, the system administrator can change the length.

3. Click OK.

#### Related links

Handling Calls on page 23

## **Opening controlled doors**

### **About this task**

You can open a controlled door without leaving your desk. For example, the telephone switch can be connected to a relay that controls the loading bay door. When someone requires access to the loading bay, you can unlock the door to allow entry.

Note that this option is not available until you configure a door name.

You can control up to 2 doors. The doors are released for 5 seconds by default.

#### **Procedure**

- 1. Click Tools > Door Entry.
- 2. Click the required door name to release the door.

### Related links

Handling Calls on page 23

### Intruding on calls

### About this task

Call intrusion is only available if you have permission to intrude and the other internal parties have given permission to intrude. Contact your system administrator configure intrusion.

### **Procedure**

- 1. Locate the user in the directory panel.
- 2. Click **Actions** > **Intrude** or press F9.
- 3. Speak to the user.

Both parties on the call can hear you.

- 4. When you want to finish the call do one of the following:
  - Click (↓
  - Click Actions > Hang up.

• Press End.

#### Related links

Handling Calls on page 23

### Sending text messages

### About this task

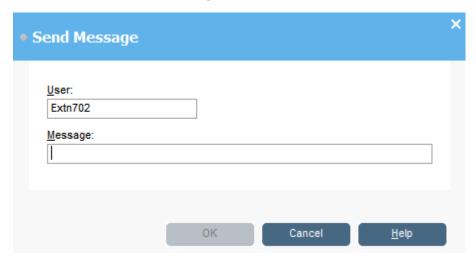
You can send a short text message to a user. The message appears on the display of most Avayatelephones. This feature is less disruptive than intruding on a call. The result sending a message depends on the user's telephone type and whether they are on a call or not.

By default, the maximum length of a message is 16 characters, however, the length can be configured by the system administrator.

When a message is sent to an Avaya DS Port display telephone, the message lights the telephone message lamp. This happens whether the telephone is free or on a call. If the telephone is free, the message text is shown. If it is on a call, the text appears after the user completes the call.

### **Procedure**

- 1. Locate the user you want to send a message to in the directory.
- 2. Click Actions > Send Message or press Ctrl + M.



The users extension number field is populated with the information from the directory.

- 3. Enter the text in the **Message** field.
- 4. Click OK.

### Related links

Handling Calls on page 23

# Sending instant messages

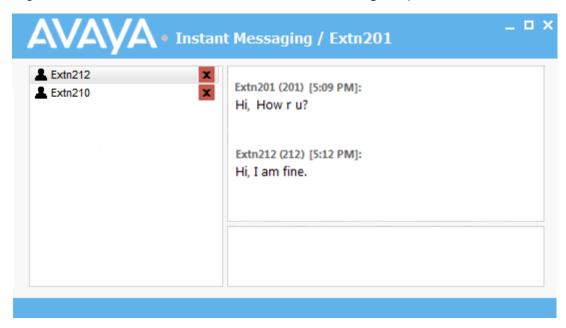
#### About this task

The console can be configured to support instant messaging. When enabled, you can use the directory to select and send instant messages to other users.

The other users must be using an Avaya application that also supports instant messaging.

#### **Procedure**

- 1. In the **Directory** pane, locate the required user.
- 2. Right-click on the user and select **Send Instant Message** or press Ctrl + I.



- 3. Enter the message in the box at the base of the window and click **Send**.
- 4. Switch between the instant messaging window and the console without interrupting the operation of either.

If you close the instant messaging window, the current chat session ends.

#### Related links

Handling Calls on page 23

# Sending email

If you have Microsoft Outlook installed on the same PC, you can use the console to send emails to users in the directory.

## **Procedure**

1. Click Tools > Send Email or press Ctrl + E.

The email message form opens.

2. Complete the details as required and send the email in the usual way.

#### Related links

Handling Calls on page 23

# Making a page call

## About this task

You can broadcast message to a group of people using the Page feature. For example, an incoming caller needs to speak to someone urgently but they cannot be found. The call can be parked and then a message broadcast for the user to pick up the call. The page is heard at any telephone extension that has a hands free speaker and is not being used.

#### **Procedure**

- 1. To send a broadcast message, do one of the following:
  - Click •)).
  - Click Actions > Page.
  - Press F10.



- 2. Select the group to broadcast the message to.
- 3. Click OK.
- 4. Speak the message.
- 5. When you are done with the message, do one of the following:
  - Click (↓.

- Click Actions > Hang up
- Press End.

#### Related links

Handling Calls on page 23

# **Recording calls**

#### About this task

You can record a complete call or part of a call.

- Recording is only supported on system with Voicemail Pro installed.
- Recording pause when a call is put on hold or parked. When you connect to the call again the recording resumes.
- When you record conference calls, the recording continues when callers are added to the conference.

#### **Procedure**

- 1. To record a call, do one of the following:
  - Click \_\_\_\_.
  - Click Actions > Record call.
  - **Press** F5.

By default, the conversation is recorded into the user's voice mailbox.

2. To finish the recording, repeat any of the steps above.

#### **Related links**

Handling Calls on page 23

# Collecting your voicemail messages

#### About this task

The console status bar indicates when you have new messages in your mailbox.

#### **Procedure**

- 1. Double-click the area that shows the number of new messages or press Ctrl + V.
  - You are connected to the voicemail server.
- 2. If you are using your own extension, press #, otherwise, enter your extension number and press #.

3. Enter your voicemail password and press #.

When you have successfully logged into your mail box, you hear an announcement describing your messages.

## **Related links**

**Handling Calls** on page 23

# **Chapter 4: Conferencing**

This section covers some of the different method for starting and controlling conferences...

#### Related links

Conferencing held calls on page 41

Viewing conferences on page 41

Adding users to a conference on page 42

Using the Conference Room Controls on page 42

# Conferencing held calls

#### About this task

You can put multiple calls on hold and then start a conference with the held calls. This is useful for small ad-hoc conferences between three or four participants. Set up larger conferences using conference rooms.

#### **Procedure**

- 1. Call and then place each call on hold.
- 2. Press the ((( button.
- 3. Click 🗘 when you are done with the conference to end the call.

#### Related links

Conferencing on page 41

# Viewing conferences

#### About this task

Use the Directory panel to view any current conferences on the telephone system. The conferences listed include ad-hoc conferences started by other users and any console conferences.

#### **Procedure**

Click in the **Directory** panel.

The conference name and host is listed for console conferences. For other conferences, just the conference number is shown.

#### Related links

Conferencing on page 41

## Adding users to a conference

## **About this task**

You can add a call to any conference running on the telephone system.

#### **Procedure**

- 1. Answer or make a call to a user.
- 2. Click in the **Directory** panel to display the current conferences.
- 3. Click the desired conference.
- 4. Click Actions > Add to Conference.

#### Related links

Conferencing on page 41

# **Using the Conference Room Controls**

The **1** and **2** buttons in the main toolbar represent the two conference rooms. You can use the conference rooms to start conferences with multiple participants.

Note: The buttons are not available until the conference room names have been created. See Naming conference rooms on page 65.

Conference participants are represented by the following icons:



#### **Related links**

Conferencing on page 41
Using a Conference Room on page 43

<u>Changing conference room views</u> on page 44

<u>Changing conference room icon arrangement</u> on page 45

<u>Changing a user's status</u> on page 45

## **Using a Conference Room**

#### About this task

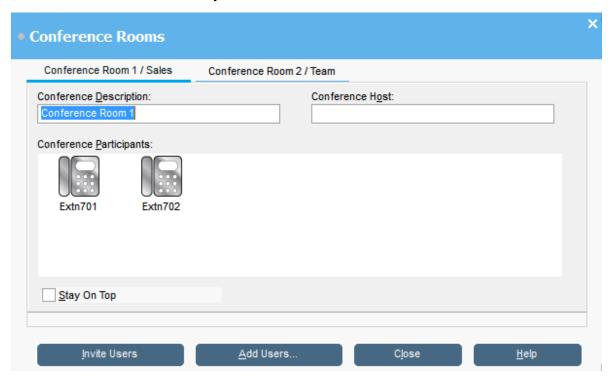
The **1** and **2** buttons in the main toolbar represent the two conference rooms. You can use the conference rooms to start conferences with multiple participants.

If the conference buttons are available, you can create a conference. If the buttons are unavailable, the conference room names have not been created. See <a href="Naming conference">Naming conference</a> rooms on page 65.

#### **Procedure**

1. Click either 1 or 2.

If a conference room is in use, the BLFs in the window show the delegate's status. If the conference room is not currently in use, the window is blank.



2. To create a new conference, in the **Conference Description** field, type the subject of the conference.

The subject only shows in the field.

3. In the **Conference Host** field, type the name of the person who has requested the conference

The name is shown when viewing current system conferences in the Directory panel.

- 4. Enter the users for the conference.
  - a. Click Add Users.
  - b. Select the users from the directory list.
  - c. If you add a user by mistake, right-click the user BLF and select **Remove**.
- 5. Invite the users to the conference using one of the following methods:
  - Automatic Invitation: To use the voicemail system to automatically invite users, click
    Invite Users. The BLF icons show with a yellow outline. Each user is rung and invited to
    the conference. The voicemail server invites users in batches of up to 5 depending on
    available connections. When the user answers, they are invited to join the conference.
    The conference icons change automatically to indicate the user's response. The user
    can respond in the following ways:

This option is only available on systems with Voicemail Pro.

- Press **1** to accept the invitation.
- Press 2 to decline the invitation.
- Press 3 to indicate that they are unavailable.
- Manual Invitation: To invite users manually, right-click on each user and select Call.
  - If they accept, click either **Add to conference 1** or **Add to conference 2** from the **Actions** menu.
  - If the user is unavailable or has declined the invitation, and the call, and right-click on the BLF to change the status accordingly to record the delegate's response.
- 6. Once a conference is in progress, you can add additional users using **Add to conference**1 or **Add to conference** 2.

You can add users to a conference room by dragging and dropping BLFs into the conference window. You can use BLFs representing both internal and external numbers.

#### Related links

Using the Conference Room Controls on page 42

## Changing conference room views

## **Procedure**

- 1. Right-click in the Conference Room windows.
- 2. Select **View** from the pop-up menu.

The view types available are:

- Large icons
- · Small icons
- · List of icons
- Details

#### Related links

Using the Conference Room Controls on page 42

## Changing conference room icon arrangement

## **Procedure**

- 1. Right-click in the Conference Room window.
- 2. Select **Arrange** from the pop-up menu.

The arrangement options are:

- Name
- Number
- Status

#### **Related links**

Using the Conference Room Controls on page 42

## Changing a user's status

#### **Procedure**

- 1. Right-click on the user's BLF.
- 2. Select Change Status.
- 3. Select the status required.

#### **Related links**

Using the Conference Room Controls on page 42

# **Chapter 5: Using the Directory**

The directory is used to display contacts for making calls.

#### Related links

Using the Directory on page 46

Editing directory entry properties on page 48

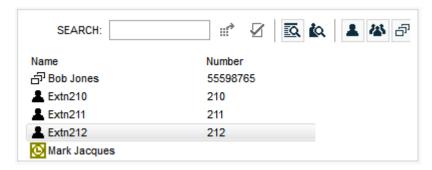
Adding or editing local directory entries on page 50

Changing hunt group status on page 51

Changing user status on page 52

# **Using the Directory**

The console panel on the right usually displays the directory of telephone names and numbers. It can include the directory entries from the telephone system, the console's own local directory and contacts from Outlook.



Changes to the telephone system directory are updated automatically every 30 minutes. They are also updated when make a manual search using the directory (up to a maximum of every 5 minutes).

#### **Directory Controls**

You can use these controls to select what information is displayed in the directory panel.

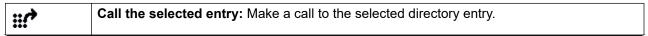


Table continues...

A	Edit the selected entry: Edit the properties of the directory entry. The settings menu displayed depends on the type of entry.
ቯ	<b>View directory items:</b> Switch between viewing details of a selected contact/conferences/ other information and viewing the directory.
ia	<b>View active conferences:</b> Use the directory panel to view conferences being hosted by the telephone system.
1	<b>Show/hide users:</b> Show or hide telephone system users in the displayed list of directory contacts.
4	<b>Show/hide groups:</b> Show or hide telephone system groups in the displayed list of directory contacts.
a a	<b>Show/hide directory contacts:</b> Show or hide other contacts in the displayed list of directory contacts.

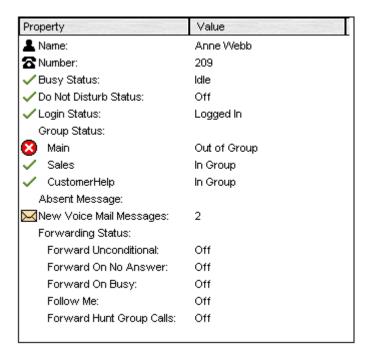
## **Directory Icons**

These icons indicate the type each contact shown in the directory.

1	User: A user on the telephone system.
4	Hunt Group: A hunt group on the telephone system.
ð	<b>Directory:</b> A directory entry from the telephone system directory or the console's local directory.
C	Outlook Contact: A contact from Microsoft Outlook running on the same PC as the console.

## **Directory Entry Details**

When the search has only one remaining match or when you double-click on a particular entry, the directory changes to show details for that entry. The information to display can be configured through the console settings.



To return to the full directory listing, remove the text from the search box. Alternatively, select **Directory** > **New Search** (Ctrl + S).

## **Related links**

Using the Directory on page 46

# **Editing directory entry properties**

#### About this task

You can use the Directory Entry Properties window to edit the properties of the entry selected.

All directory entries have an icon that indicates the entry type.

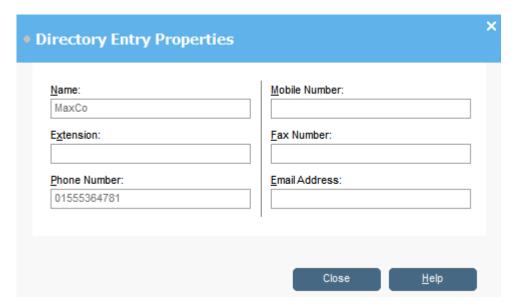
- Lindicates user
- indicates a hunt group
- Note:

The settings shown in console are those that were current when the user or group was selected. If the settings are then updated by another method, for example from a user's phone, those changes are not shown until the existing settings are closed and then reopened.

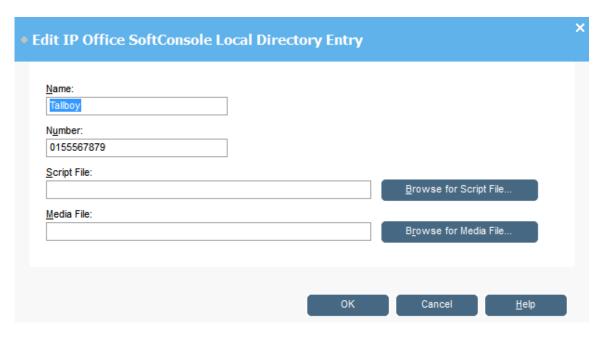
#### **Procedure**

1. Click an entry in the directory.

- 2. Click .
- 3. Double-click a directory entry to see the properties in the panel.
- Double-click on the properties to show the details. The form that opens depends on whether the number is from the telephone system directory or from the local console directory.
  - The Directory Entry Properties form displays names and numbers from the telephone system. These are used both for outward dialing and to match names to incoming caller numbers. Entries in the telephone system directory are available to all users through directory functions on their telephones. The only fields used for a telephone system directory number are Name and Phone Number. These cannot be changed through the console.



 The Edit IP Office SoftConsole Local Directory Entry window displays the local console directory for outgoing dialing and to match a name to an incoming call. When a name match exists in both the telephone system directory and the console directory, the name in the console directory is used.



#### Related links

Using the Directory on page 46

# Adding or editing local directory entries

#### About this task

From the **Incoming Calls** tab, you can create new entries and edit the properties of existing local directory entries.

## **Procedure**

- 1. Click 🔧.
- 2. Select the Incoming Calls tab or select Tools > Preferences > Incoming Calls...
- 3. To add a new entry, click **Add**.
- 4. To edit an existing entry, select an entry and click Edit.
- 5. In the **Name** field, enter or edit the name you want associated with the entry.
- 6. In the **Number** field, enter the telephone number to dial when you select the directory entry. The number is also used for matching against incoming calls.
- 7. In the **Script File** field, enter or browse for a script file name (.txt or .rtf file) to associate with the directory entry. When an incoming call matches the directory entry number, the script appears in the directory panel.

8. In the Media File field, enter or browse for a media file name (.wav file) to associate with the directory entry. When an incoming call matches the directory entry number, the file is played by the console PC.

#### Related links

Using the Directory on page 46

# Changing hunt group status

## About this task

You can change a hunt group's status between In Service and Out of Service.



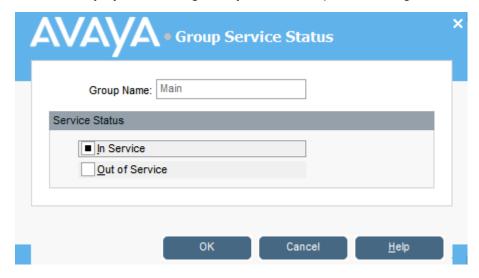
#### Note:

The settings shown in console are those that were current when the user or group was selected. If the settings are then updated by another method, for example from a user's phone, those changes are not shown until the existing settings are closed and then reopened.

#### **Procedure**

- 1. Click **!!!** in the Directory panel.
- Click .

You can change a hunt group's status depending on the telephone system configuration. Out of Service calls go either to another destination or to voicemail. The ability to use this feature is not enabled by default. A third status setting, Night Service, is set either automatically by time settings or by the use of special dialling



#### Related links

Using the Directory on page 46

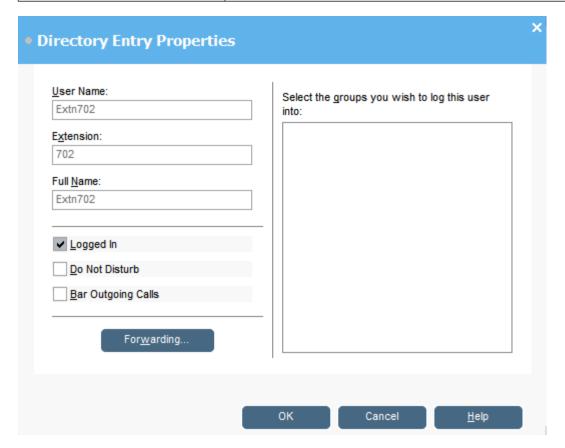
# **Changing user status**

You can change a user's status from the directory.

#### **Procedure**

- 1. Click **L** in the **Directory** panel.
- 2. Click 🔽.
- 3. You can change the following options for the user:

Option	Description
Do Not Disturb	Shows whether the user is on do not disturb status.
Bar Outgoing Calls	The user cannot make outgoing calls.
Forwarding	Click to display forwarding settings.
Group Service Status	A list of the hunt groups that the user belongs to. If the group is checked, the user is in the group.



## **Related links**

<u>Using the Directory</u> on page 46 <u>Changing user forwarding status</u> on page 53 Setting mobile twinning on page 54
Follow Me behavior on page 55
Forward Unconditional behavior on page 56
Forward on Busy/No Answer behavior on page 57

## Changing user forwarding status

#### About this task

You can view and change the forwarding status of a user. You can divert incoming calls to an internal or external telephone number. You can enter the destination telephone number and select whether all calls are redirected or only external calls.

There are four types of fowarding:

- Follow Me
- Fowarding unconditional
- Forward on busy
- · Forward on no answer

For call appearance users, Forward on Busy is only used when all their call appearance buttons are busy.

You can enter the destination telephone number and select whether all calls are redirected or only external calls.

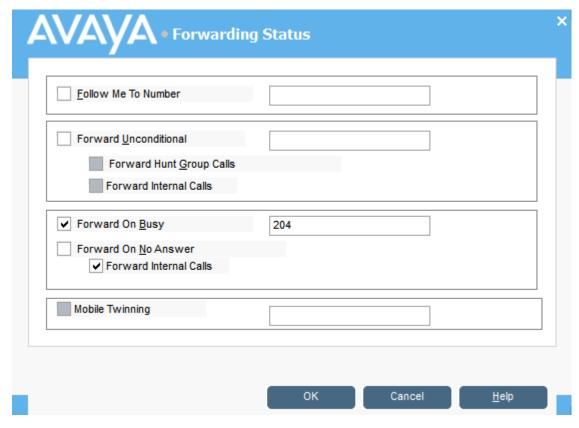


The settings shown in console are those that were current when the user or group was selected. If the settings are then updated by another method, for example from a user's phone, those changes are not shown until the existing settings are closed and then reopened.

#### **Procedure**

- 1. Click **L** in the **Directory** panel.
- 2. Click .

## 3. Click Forwarding.



4. Type the destination telephone numbers in the appropriate fields.

You can also select numbers from your directory list. You must enter an internal extension number as the Follow Me destination. Some forwarding options required telephone system configuration. For example, a user might be barred from making outgoing calls. See your system administration for more information.

- 5. Right-click in a number field.
- 6. Select the telephone number required from the listing.
- 7. Click Add.

#### Related links

Changing user status on page 52

## **Setting mobile twinning**

If twinning is enabled on the system, any incoming calls ring the extension number and the external twinned number. For example, a users extension number rings as well as their mobile telephone. The call can be answered from either the extension or mobile telephone. See your system administrator. Mobile twining is a licensed feature.

#### About this task

If any forward options are selected, both the external telephone and the extension where the calls are forwarded to will ring.

If account codes are used, the user cannot enter an account code when they answer a call at the external telephone.

If the feature Do Not Disturb is selected, any callers to the internal extension will hear the busy tone. The users external telephone will not ring. If a caller is entered into the DND exception list, only the internal telephone rings. Users cannot add numbers to the DND exceptions list. See your system administrator.

If the Follow Me option is selected, only the extension that the calls are forwarded to will ring. The external telephone number will not ring.

If the settings are updated by another method, for example, using another application or through the users telephone, the values shown in the console are not automatically updated if already being displayed. The values displayed in the console directory are those current when the user/group was selected.

#### **Procedure**

- 1. Click **L** in the **Directory** panel.
- 2. Click .
- 3. Click Forwarding.
- 4. Select Mobile Twinning.
- 5. In the **Mobile Twinning** field, enter the telephone number that you want to twin to the user's extension. Enter telephone numbers with no spaces.
- Click **OK** to save your changes.

#### Related links

Changing user status on page 52

## Follow Me behavior

When you select Follow Me forwarding, the system forwards all calls to the designated extension number. Use this feature to temporarily redirect calls when you are away from your extension but available at another extension. You must enter an internal extension number as the destination.

Follow Me works in the following ways:

- You can make calls from your original extension. The only calls that can be received at your original extension are calls made from the Follow Me destination extension.
- Any Speed Dial associated with your original extension number does not indicate that the calls are being forwarded to another number.
- If you have set an absent message, the text is displayed to callers. If absent text is active at the destination extension, it will not be displayed because your absent message takes priority.

## Forwarding settings affect Follow Me behavior

The following Forwarding options affect how Follow Me works:

Forward Unconditional

Setting is ignored.

Forward on Busy If the destination extension is busy, the call is forwarded to your

Forward on Busy destination. If there is no answer at the extension,

the call is transferred to your voicemail, if available.

Forward on No Answer

If there is no answer at the destination extension, the Forward on No Answer setting is ignored and the call is transferred to your voicemail,

if available.

#### **Scenarios**

Anne Webb (extension 206) diverts all her calls to extension 207 using Follow Me. There is an incoming call for Anne. Depending on what happens at extension 207, the following behavior will occur:

Scenario	Forward on Busy/No Answer	No Forward
Extension 207 is busy.	Call is transferred to Anne's Forward on Busy extension number.	Call is transferred to Anne's voicemail.
No answer at extension 207.	Call is transferred to Anne's voicemail.	Call is transferred to Anne's voicemail.

#### Related links

Changing user status on page 52

## Forward Unconditional behavior

When you select Forward Unconditional and enter a destination number entered, the system redirects all your calls to an extension number or, if enabled, an external number. See your system administrator to determine if you can forward to an external number.

Forward Unconditional works in the following ways:

- You can make outgoing calls from your extension. The only calls that you can receive when all your calls are forwarded are calls made from the destination number.
- If you have set an absent message, the text is displayed to caller. If absent text is active at the destination extension it will not be displayed because your absent message takes priority.

## Forwarding settings affect Forward Unconditional behavior

The following Forwarding options affect how Forward Unconditional works:

**Follow Me** Overrides Forward Unconditional setting.

**Forward Hunt Group** 

Calls

Only applies to hunt groups that are configured for sequential or rotary ringing mode. See your system administrator. It includes internal calls to the hunt group regardless of the **Forward Internal** 

Calls setting.

Forward on Busy Not available.

Forward on No Answer Not available.

#### **Scenarios**

Forward Unconditional	Forward Hunt Group Calls	Forward Incoming Calls	Behavior
Yes	Yes	Yes	All calls redirected to the Forward Unconditional destination number.
Yes	Yes	No	External calls and hunt group calls received by your extension are redirected to the Forward Unconditional destination number.
Yes	No	No	External calls are redirected to the destination number. Internal calls, including any hunt group calls, are presented to your extension.

#### Related links

Changing user status on page 52

## Forward on Busy/No Answer behavior

When you select Forward on Busy/No Answer, your calls are redirected to the number entered in the **Forward on Busy/No Answer** field. The same number is used for calls forwarded when your extension is busy or not answered.

Forward on Busy/No Answer works in the following ways:

- The first time you select Forward on No Answer, the option Forward Internal Calls is automatically selected. If Forward Internal Calls and Forward on No Answer are de-selected, the next time Forward On No Answer is selected, the option Forward Internal Calls is not automatically selected.
- If you have set an absent message, the text is displayed to callers when the Forward on Busy/No Answer forwarding option is selected. If absent text is active at the destination extension it will not be displayed because your absent text takes priority.

## **Scenarios**

Forward on Busy	Forward on No Answer	Forward Internal Calls	Behavior
Yes	No	No	External calls are forwarded to the specified number when your extension is busy. Internal calls are transferred to your voicemail, if available.
Yes	No	Yes	All calls are forwarded to the specified number when your extension is busy.
No	Yes	No	External calls are forwarded to the specified number when your extension is not answered. Internal calls are transferred to your voicemail, if available.
No	Yes	Yes	All calls are forwarded to the specified number when your extension is not answered.
Yes	Yes	No	External calls are forwarded to the specified number when your extension is not answered or your extension is busy. Internal calls are transferred to your voicemail, if available.
Yes	Yes	Yes	All calls are forwarded to the specified number when your extension is not answered or is busy.

## Related links

Changing user status on page 52

# **Chapter 6: Using the Call History**

This section covers the use of the console's call history display. The call history is stored locally on the PC running the application. Therefore it differs from the separate call log stored on whichever phone you are using with the console.

Note that details of a call are automatically deleted from the call history after a number of days, see General console settings on page 78.

#### Related links

<u>Viewing call history</u> on page 59

<u>Making calls from the call history view</u> on page 59

<u>Clearing the call history</u> on page 60

# Viewing call history

#### **Procedure**

Click View > History.

The **Call History** details replace the BLF and held calls panels.

#### Related links

Using the Call History on page 59

# Making calls from the call history view

#### **Procedure**

Double-click on the telephone number shown in the call history.

#### **Related links**

Using the Call History on page 59

# Clearing the call history

## About this task

The details of a call are automatically removed from the call history after a number of days. That duration is set by the console's **Call history retention period (in days)** setting, see <u>General console settings</u> on page 78.

However, if required, you can manually delete all calls on a particular tab or on all tabs as follows.

#### **Procedure**

- 1. Right-click on the call history.
- 2. To remove all calls from the current tab, select Clear.
- 3. To remove all calls from all tabs, select Clear All Tabs.

#### **Related links**

Using the Call History on page 59

# Chapter 7: Configuring the Console Application

This section covers the various controls that can be used to configure the application's appearance and operation.

# **Console settings**

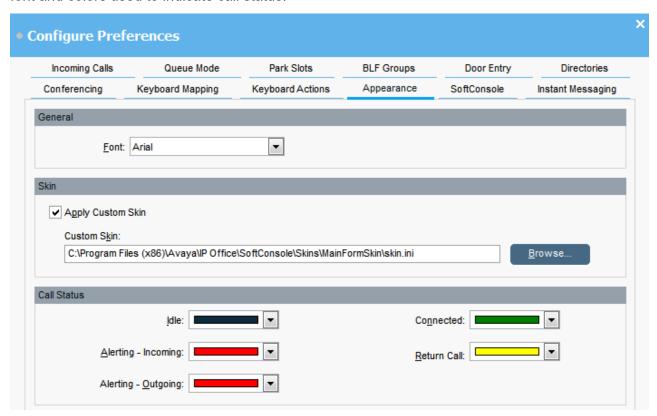
You can configure or edit console settings by clicking **\ Preferences** and then selecting the appropriate tabs.

Tab	Description	
Appearance	Change the general appearance of the console application. For example, you can change font and colors used to indicate call status.	
BLF groups	Create, edit, and delete Busy Lamp Field (BLF) groups. You can also rearrange the order of the groups.	
Conferencing	Specify the names of conference rooms.	
Directories	Specify whether directory information is included in the directory display or in the properties of individual entries.	
Door Entry	Specify door names. You cannot control doors in console until you enter door names.	
Incoming Calls	Optionally, provide a name match against an incoming call. You can use matching numbers to play a specific script or media file on calls.	
Keyboard actions	Customize the default actions performed when you start typing text or a number.	
Keyboard mapping	View and change keyboard shortcuts.	
Park Slot	Specify the available slot buttons and the IDs associated with each button.	
Queue mode	Configure and monitor up to eight hunt group queues.	
SoftConsole	Configure how the console saves changes you make to the screen layout. You can also specify the console behavior when you close its window.	
Instant Messaging	Configure support for instant messaging.	

## Customizing the console's appearance

#### About this task

You can change the general appearance of the console application. For example, you can change font and colors used to indicate call status.



## Before you begin

If you want to use a custom skin, you must have a skin definition file.

#### **Procedure**

- 1. Click > Preferences.
- 2. Select Appearance.
- 3. (Optional) Select a new font from the Font drop-down menu.
- 4. **(Optional)** If you want to select and use a custom skin, select the **Apply Custom Skin** check box.

A skin is a set of files defining the whole appearance of the application. By default, no additional skins are supplied.

Click **Browse** and upload your skin definition file.

5. (Optional) Change the call status colors.

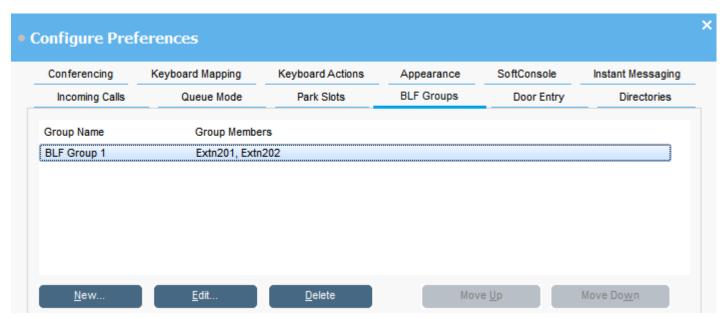
You can select a different color for each call status. These colors appear in the border of the call details panel. The available call status options are:

- Idle
- Alerting Incoming
- Alerting Outgoing
- Connected
- Return Call

# Working with BLF groups

#### About this task

Busy Lamp Field (BLF) icons provide user status and speed dials at a glance. You can add icons for other numbers, which act as speed dials. You can also group BLF icons to appear on different named tabs.



#### **Procedure**

- 1. Click > Preferences.
- Select BLF groups.

The menu displays the name of each group and the members within the group.

- 3. To create a new BLF group:
  - a. Click New.

You can also right-click on a blank area of the BLF panel and then select **New > BLF groups**.

- b. Enter a unique name in **BLF Group Name**.
- c. Select the required members from the **Members not in BLF Group** list.
- You can press Ctrl on your keyboard to select multiple members at a time.
- d. Click **Add** to add the selected members.
- e. Click **OK** to save your change.

The new BLF group appears at the end of the list.

- 4. To edit the selected BLF group:
  - a. Click Edit.
  - b. Add or remove group members as required.
  - c. Click **OK** to save your change.
- 5. To delete the selected BLF group, click **Delete**.
- 6. To change the position of BLF groups in the list:
  - a. Select the group you want to move.
  - b. Click Move Up and Move Down as required.

## **Changing BLF panel view**

## **Procedure**

- 1. Right-click the BLF panel and select View.
- 2. Choose a view.

Choice	Description
Ctrl + Alt + G	Large icons
Ctrl + Alt + S	Small icons
Ctrl + Alt + I	List icons
Ctrl + Alt + D	Details

- 3. To change the icon arrangement, right-click the BLF panel and select **Arrange**.
- 4. Select the way you want to arrange the icons.

Choice	Description
Ctrl + Alt + N	Name order
Ctrl + Alt + M	Number order
Ctrl + Alt + U	Status order

- 5. To change small or large icon message view to horizontal, press Ctrl + Alt + H.
- 6. To change small or large icon message view to vertical, press Ctrl + Alt + V.

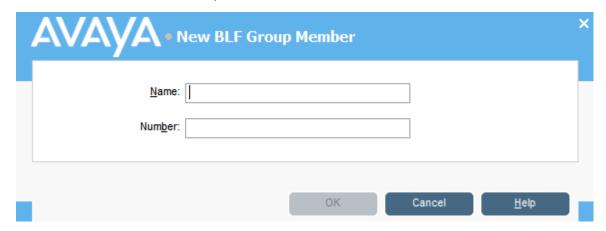
# Adding members to a BLF group

#### About this task

You can add members to a BLF group from the BLF panel in the main window.

#### **Procedure**

- 1. To add new members to a BLF group, do one of the following actions:
  - Right-click within the BLF panel, highlight **New** and click **BLF Group Member**.
  - Press Ctrl + Alt + B.
  - Double-click within the BLF panel.



- 2. Enter the **Name** and **Number** for the new member.
- 3. Click **OK** to return to the BLF panel.

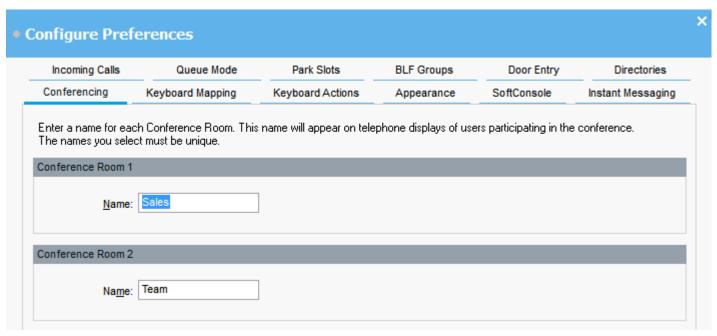
# Naming conference rooms

#### About this task

Name the two conference rooms that console supports. The names appear on the telephone displays of internal users in the conference room.



The conference room features cannot be used until the rooms are given names.

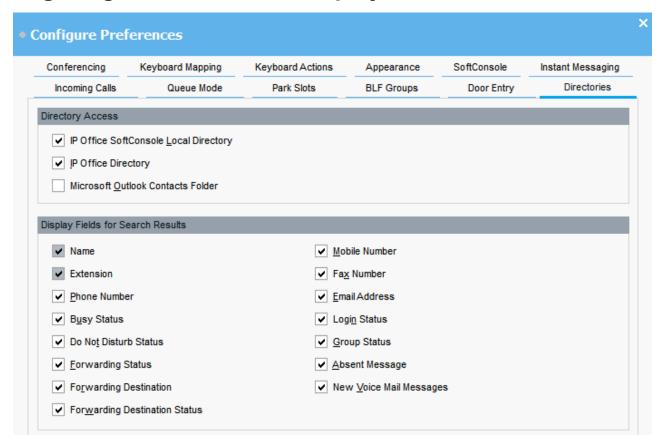


## **Procedure**

- 1. Click > Preferences.
- 2. Select Conferencing
- 3. Enter unique names for each conference room.

Each name can contain up to 10 characters.

# **Configuring the Directories Display**



## **Directory access**

The options that appear in this section show where directory numbers, other than users and groups, are obtained.

Name of option	Description	
IP Office SoftConsole Local Directory	Show directory entries stored locally by the console application.	
IP Office Directory	Show system directory entries stored on the telephone system.	
Microsoft Outlook Contacts Folder	This options allows address book entries from Outlook to be included in the directory.	
	* Note:	
	Outlook must be running on the same computer.	
	You must run Outlook with administrator privileges.	

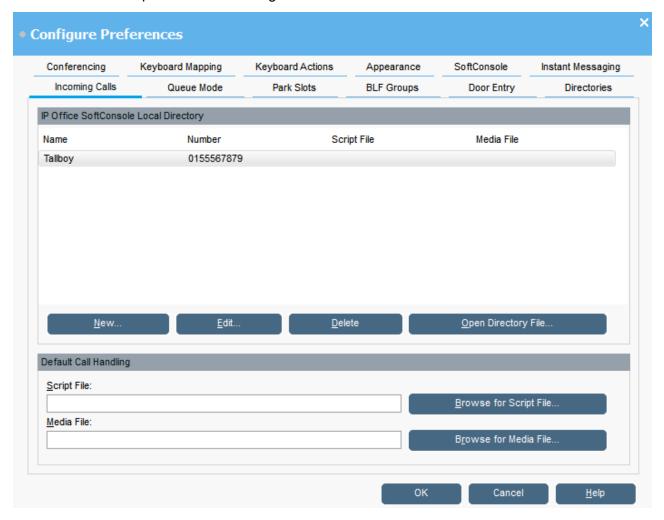
## **Directory fields for search results**

When a directory search matches an individual directory entry, the directory panel displays information about the entry.

# **Configuring the Console's Locale Directory Entries**

On the **Incoming Calls** tab, you can setup directory names and numbers shown in the Directory panel as the console's local directory. The directory numbers can be used to make outgoing calls and provide a name match for incoming calls.

You can associate a specific script to display or a media file to be played when the console receives a call from a matching number. For default call handling, you can set a default script or default sound file. These settings apply when the incoming call does not match a specific number that has its own script or sound file assigned.



#### **IP Office SoftConsole Local Directory:**

This table displays the local directory of contacts stored by the console application.

Field name	Description
Name	The contact name.

Table continues...

Field name	Description
Number	The telephone number that is dialed when the directory entry is selected. This number is also used for matching against incoming calls.
Script File	A script can be associated with the directory entry. When an incoming call matches the directory number, the script is displayed in the directory panel. The script can be a .TXT or .RTF file.
Media File	A sound file can be associated with the directory entry. When an incoming call matches the directory number, the file is played by the console PC. The file is a .WAV file.

Button	Description
New	Add a new directory entry.
Edit	Edit the selected entry.
Delete	Delete the selected entry.
Open Directory File	Change the file used for storing the console's local directory entries. The entries in the selected file are then listed in the window.

## **Default Call Handling:**

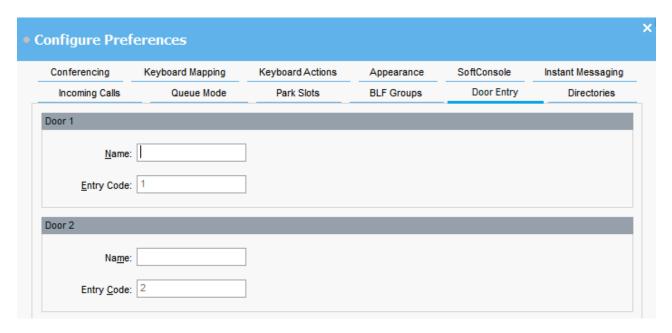
These fields can be used to associate a script file and or media file with any calls that do not have its own script and or media file specified in the directory.

Field name	Description
Script File	A script can be associated with the directory entry. When an incoming call matches the directory number, the script is displayed in the directory panel. The script can be a.TXT or .RTF file.
Media File	A sound file can be associated with the directory entry. When an incoming call matches the directory number, the file is played by the console PC. The file is a .WAV file.

# **Entering door names**

## **About this task**

You must enter door names before you can use the console to control a door attached to the telephone system.



## **Procedure**

- 1. Click > Preferences.
- 2. Select **Door Entry**.
- 3. In **Name**, type the name that you want to use for the door.

For example, you might enter the name Loading Bay for a door to a loading bay.

The **Entry Code** for each door name is pre-populated with 1 or 2. The number indicates the door relay to activate. You cannot change entry codes.

4. Click **OK** to save your change.

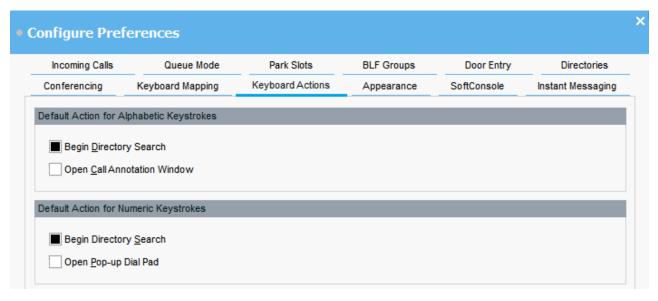
#### Result

You can now open a door from **Tools** > **Door Entry**. You can then select the appropriate door name from the menu.

# **Configuring keyboard actions**

#### About this task

You can specify what happens in the console when you start pressing alphabetic or numeric keyboard characters.



## Before you begin

If you want to modify the **Maximum length for call notes** field, you must log in to the console in Administrator mode.

#### **Procedure**

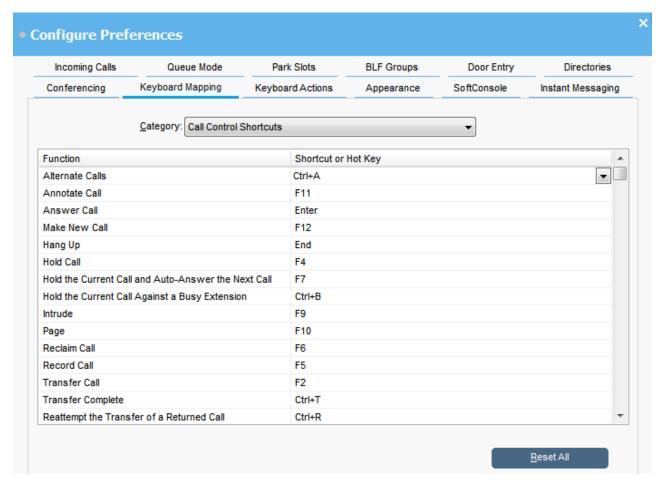
- 1. Click > Preferences.
- 2. Select Keyboard actions.
- 3. Select the appropriate default action for alphabetic keystrokes. The options are:
  - Begin Directory Search
  - Open Call Annotation Window
- 4. Select the appropriate default action numeric keystrokes. The options are:
  - Begin Directory Search
  - · Open Pop-up Dial Pad
- 5. **(Optional)** If you are in Administrator mode, modify **Maximum length for call notes** if required.

The default length is 16 characters. If you increase this value, the note might not be fully visible on all telephones and applications. The length specified in this field also applies to text messages that you send to other users' phones.

# Modifying keyboard shortcuts

#### About this task

You can view and modify the console keyboard shortcuts.



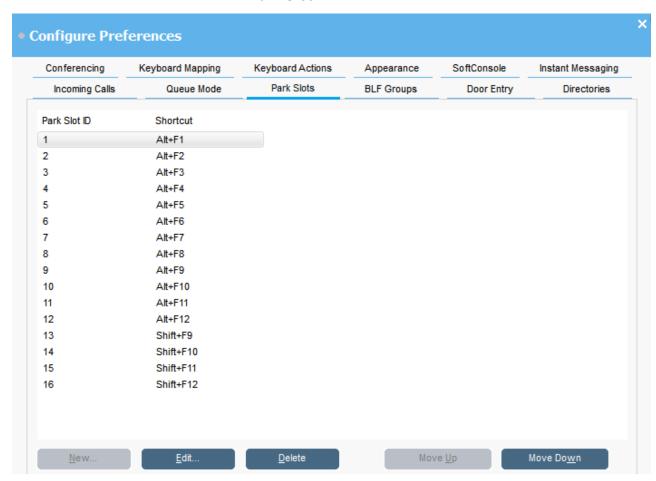
#### **Procedure**

- 1. Click > Preferences.
- 2. Select Keyboard mapping.
- 3. From the **Category** drop-down menu, select the set of shortcuts that you want to view. An example of a category is call control shortcuts.
- 4. To modify a specific shortcut key:
  - a. Select the current shortcut key.
  - b. Use the drop-down menu to select a new shortcut key.
     A warning displays if the new shortcut key you select is already in use.
- 5. To reset all shortcut keys back to their default settings, click **Reset all**.

# **Configuring park slots**

# **About this task**

You can set the number of available **Park Slot** buttons and the IDs associated with each button.



- 1. Click > Preferences.
- 2. Select Park slots.
- 3. To add or edit a park slot:
  - a. Click **New** to add a new park slot.
  - b. Click **Edit** to modify the selected park slot.
  - c. Enter or modify the alphanumeric park slot ID, which can contain letters and numbers, but not spaces.



If you need a secure parking slot, configure the park slot ID with text. You will not be able to unpark the call using normal telephone dialing. Instead, you will need to use an application **Park Slot** button set to the same text.

- d. Enter a keyboard shortcut to park or unpark a call into a specific park slot. You can also use the **Keyboard mapping** tab to edit shortcuts.
- 4. To remove the selected park slot from the list, click **Delete**.
- 5. To change the order of configured park slots:
  - a. Select the park slot you want to move.
  - b. Click Move Up and Move Down as required.

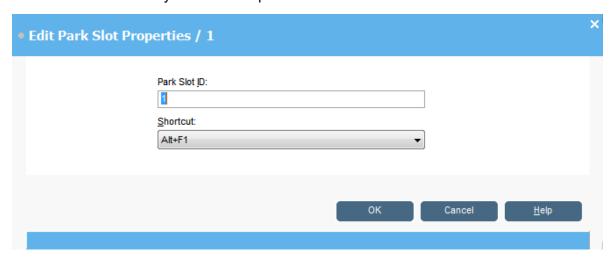
# Configuring park slots

# About this task

You can set the number of available Park Slot buttons and the IDs associated with each button.

### **Procedure**

- 1. Click > Preferences.
- 2. Select Park slots.
  - a. Click **New** to add a new park slot.
  - b. Click **Edit** to modify the selected park slot.



3. Configure the park slot as required:

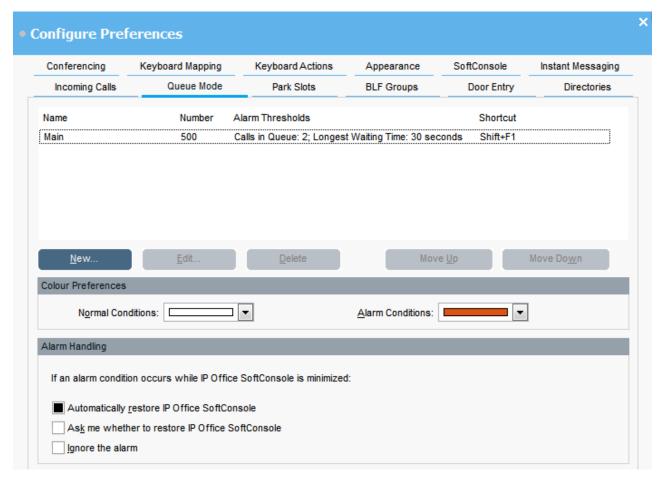
Choice Option	Choice Description			
Park Slot ID	Each ID can be alphanumeric, containing both numbers and letters. The ID should not include spaces.			
	Note:			
	If you need a secure parking slot, configure the park slot ID with text. You will not be able to unpark the call using normal telephone dialing. Instead, you will need to use an application <b>Park Slot</b> button set to the same text.			
Shortcut	A keyboard short cut that enables the operator to park or unpark a call into a specific park slot. The short cuts can also be edited through the Keyboard Mappings menu			

4. Click OK.

# Configuring queue monitoring for hunt groups

# About this task

You can configure queue monitoring for a specific hunt group. You can configure and monitor up to eight queues. One of the queues is configured as a recall queue. The recall queue shows calls that have been queued, answered, and then transferred. In this case, the transferred call was not answered. Instead of being returned to the original queue, these types of calls are placed into a new queue called "Recall".



# Before you begin

An administrator must configure a hunt group on the telephone system with queuing enabled.

#### **Procedure**

- Click > Preferences.
- Select Queue mode.

Details of queues being monitored display on the screen. You can see the alarm thresholds for each queue. The alarm thresholds are the number of calls and the longest waiting call.

- 3. To add or edit a queue:
  - a. Click **New** to add a new queue to monitor.
  - b. Click **Edit** to modify the settings of the selected queue.
  - c. Select the appropriate queue type from the **Queue Name** drop-down menu.
  - d. Select the shortcut key combination for the queue from the **Shortcut** drop-down menu.
  - e. Select the appropriate alarm settings for the queue.

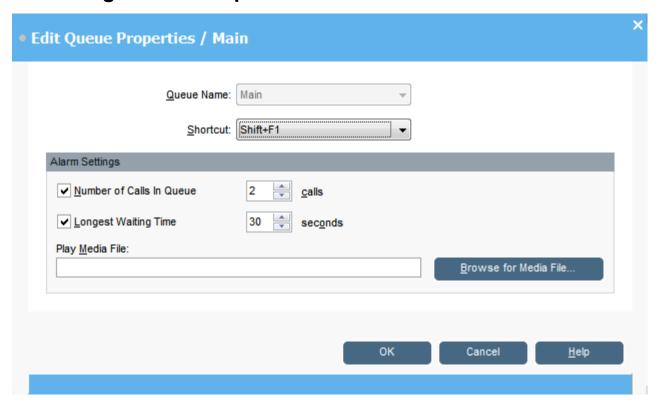
For more information about alarm settings, see <u>Alarm setting field descriptions</u> on page 77.

- 4. To delete the selected queue, click **Delete**.
- 5. To adjust the order of queues in the display:
  - a. Select the queue you want to move.
  - b. Click Move Up and Move Down as required.
- 6. **(Optional)** In the Color preferences section, change the colors that the queue uses for normal conditions and alarm conditions.
- 7. **(Optional)** Configure alarm handling to define what happens when a queue goes over the alarm threshold.

You can select one of the following alarm handling options:

- Automatically restore IP Office SoftConsole
- Ask me whether to restore IP Office SoftConsole
- · Ignore the alarm

# Alarm setting field descriptions



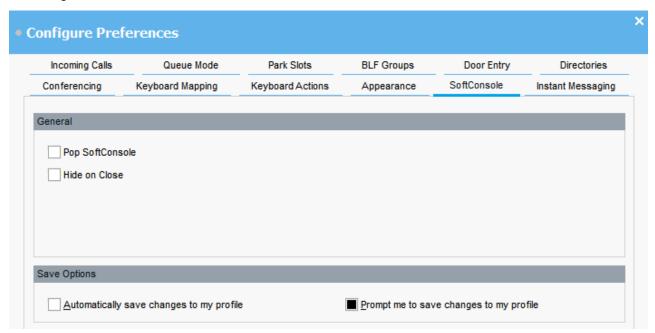
When creating or editing a queue, you can configure the alarm settings described in the following table.

Name	Description
Number of Calls In Queue	When this check box is selected, an alarm occurs when the number of calls within the queue reaches the number specified.
	You can modify the number of calls within the queue before an alarm occurs.
Longest Waiting Time	When this check box is selected, an alarm occurs when the call wait time in seconds reaches the time specified.
	You can modify the call wait within the queue in seconds before an alarm occurs.
Play Media File	You can upload an audio file that defines how the alarm sounds. The alarm goes off when a defined alarm state is reached.

# **General console settings**

# **About this task**

You can define how profile changes are saved. You can also set how the console behaves for incoming calls and when its window is closed.



- 1. Click > Preferences.
- 2. Select SoftConsole.

Choice Option	Choice Description
Pop SoftConsole	If selected, the console is brought to the front of all applications running on the PC running when you receive a new incoming call.
Hide on Close	If selected, closing the console minimizes it to the system tray in your Windows task bar. You can exit the application by selecting in the system tray and then clicking <b>Exit</b> .
Auto directory	If selected, the console updates the directory contacts from the telephone system every 30 minutes and every time a directory search is performed.
refresh	If not selected, the contacts are only updated each time the console is started.
Automatically save changes to my profile	If selected, when you close the console, any changes to your console settings are automatically saved to the profile that was selected when logging in.
Prompt me to save changes to my profile	If selected, when you close the console, you are prompted whether to save changes to your console settings to the profile that was selected when logging in.
Call history retention period (in days)	This value sets how long details of a call remain in the console's call history before being automatically deleted.

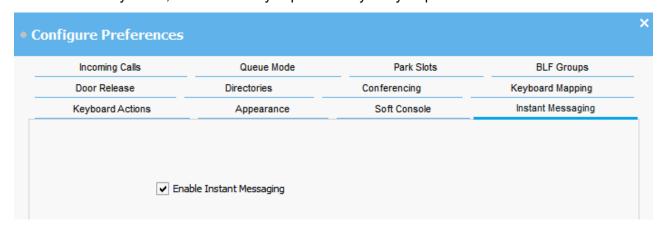
3. Click **OK** to save your change.

# **Enabling instant messaging**

# About this task

BBefore you complete this configuration, the console status bar displays IM disconnected.

- For non-cloud systems, IM functionality is provided by either Avaya Spaces or Avaya one-X<sup>®</sup> Portal for IP Office.
- For cloud systems, IM functionality is provided by Avaya Spaces.



- 1. Click > Preferences.
- 2. Select Instant Messaging.
- 3. Select **Enable instant messaging** if you want to use IM with the console.
- 4. Click **OK** to save your change.

# **Chapter 8: Templates and profiles**

When you first log in, you select one of the default console templates. While using the console, you can change various settings and also change the appearance of the screen. You can save those changes as a personal profile. The current profile or template that you are using is shown in the consolestatus bar.



To change if the Held calls and BLF panels are hidden or shown, you must be logged in to the console as an Administrator.

# Loading and saving a profile

#### About this task

You can load a new profile when logging in. You can save changes to your profile manually, or you can configure console to automatically save every change.

- To load a profile, do the following when logging in:
  - 1. Click Expand.
  - 2. Select the required profile.
- To manually save your current profile changes, select File > Save Profile.
- To manually save your changes as a new profile, do the following:
  - 1. Select File > Save Profile As.
  - 2. Enter a new file name.
  - 3. Click **OK** to save your change.

The status bar displays the new profile name.

• To configure the console to automatically save changes, go to \ Preferences > SoftConsole.

# **Editing a profile**

# Before you begin

- You must be in Administrator mode. See Logging into administrator mode on page 84.
- Ensure you select the profile you want to edit when you are logging in.

# **Procedure**

- 1. Make the required changes in the profile.
  - In **View**, you can hide or show the Busy Lamp Fields (BLF), Held calls, and Park slots panels. You can also access the normal view options.
- 2. Click **File > Save Profile** to save your changes.

# Creating a new template

### **About this task**

You can use templates to create a user profile.

# Before you begin

• You must be in Administrator mode. See Logging into administrator mode on page 84.

### **Procedure**

- 1. While logging in to Administrator mode, do the following:
  - a. Click Expand.
  - b. Select the appropriate template.
- 2. Change the layout as required.

You can change the following:

- Display size of panels
- Number of park slots
- · Panels that are visible
- 3. Click File > Save Template.
- 4. Enter a name for the template and then click **OK**.

# **Default templates**

The following three default templates are installed:

	Admin Template 1	Admin Template 2	Admin Template 3
Menu bar	Yes	Yes	Yes
Tool bar	Yes	Yes	Yes
Call details	Yes	Yes	Yes
Directory panel	Yes	Yes	Yes
Queue panel	Yes	Yes	Yes
Held calls panel	Yes	Yes	_
BLF panel	Yes	_	_
Park slots panel	Yes	Yes	_

If a profile is created using Admin Template 3, you cannot see the Call History panel.

# Chapter 9: Working with Administrator mode

#### About this task

You can start the console in Administrator mode. In this mode, you can do the following:

- Create and edit user profiles.
- Amend the length of the call notes.
- Create and edit templates.
- Remove or display the BLF, Held calls, and Park slots panels.

# Important:

You cannot access telephony functions in Administrator mode.

# Logging into administrator mode

# About this task

Use the following process to login to the console in administrator mode.

# Important:

You cannot access telephony functions in administrator mode.

- 1. In the **Login** window, enter the administrator login details. The user name is Administrator. The default password is password. The password can be changed when logged into administrator mode.
- 2. If intending to edit a profile, click **Expand** and ensure that the required profile is selected.
- 3. Click OK.
- 4. Once logged in, the status bar indicates that you are in administrator mode and not connected to the telephone system.

# Changing the administrator mode password

# **About this task**

You can start the console in administrator mode. In this mode, you can do the following:

# Before you begin

• Login to the console in administrator mode. See Logging into administrator mode on page 84.

- 1. Click File > Change Administrator Password.
- 2. Enter the current Administrator mode password.
- 3. Enter and confirm the new password.
- 4. Click **OK** to save your changes.

# **Chapter 10: Troubleshooting**

This section provides notes on known issues that may occur and how to resolve them.

#### Related links

Cannot use the Force Extension Status or Group Service Status features on page 86

Unanswered calls are not returned to the operator on page 86

Microsoft Outlook warning screen opens at Login on page 87

Directory does not show Outlook contacts on page 87

# Cannot use the Force Extension Status or Group Service Status features

#### Cause

There is an interval of several seconds after the console has been started that the operator cannot use these features. During this interval, the Directory Entry Properties and Group Service Status forms will display a **Close**button, rather than the **OK**and **Cancel** buttons.

#### Solution

Close the form, wait several seconds and then reopen the form to try again.

#### **Related links**

**Troubleshooting** on page 86

# Unanswered calls are not returned to the operator

#### Cause

For calls to be returned to the operator when they are not answered, a Transfer return time must be set in the User Telephony tab in the telephone system's configuration.

#### Solution

Contact your system administrator.

### **Related links**

**Troubleshooting** on page 86

# Microsoft Outlook warning screen opens at Login

### Cause

If directory access to Microsoft Outlook contacts folder has been selected in the Directories tab, an Outlook warning screen might appear when you login to the console or use the **Send Email** option.

# Solution

- 1. Select Allow access for check box, then click an amount of time in the list.
- 2. Click Yes.

# **Related links**

**Troubleshooting** on page 86

# **Directory does not show Outlook contacts**

# Cause

Outlook needs to be running with administrator privileges.

### Solution

Contact your computer support team.

#### Related links

**Troubleshooting** on page 86

# Index

Α		clearing call history	
		collecting parked calls	
actions	70	compact view	<u>13</u>
keyboard	<u>70</u>	conference	0.5
adding	50	name	
local directory entries		rooms	
adding members to a BLF group		Conference Room	<u>42</u>
adding users to conferences		conferences	
Administrator mode	<u>84</u>	adding users	
Login	<u>84</u>	changing room views	
Password	<u>85</u>	changing user status	
AdminTemplate1	<u>82</u>	creating	
AdminTemplate2	<u>82</u>	room icon arrangement	<u>45</u>
AdminTemplate3	<u>82</u>	viewing	<u>41</u>
answering calls	<u>23</u>	conferencing	<u>65</u>
answering queued calls	<u>34</u>	held calls	41
appearance		Conferencing	41
change	62	configure	
customize		ĬМ	79
	<del></del>	keyboard actions	
_		keyboard shortcuts	
В		one-X Portal server	
h		park slot	
bar	47	consultation calls	
menu		contacts don't show	
status	<u>17</u>	controlled doors	
behavior		creating conferences	
close		creating contenences	<u>43</u>
incoming call	<u>78</u>		
save		D	
BLF			
BLF icons	<u>30</u>	details	
BLF panel	<u>14, 32, 64</u>	call	<u>15</u>
Busy	<u>27</u>	Dial Pad	<u>29</u>
busy lamp fields	<u>63</u>	directories	<u>67</u>
buttons		directory	
toolbar	<u>18</u>	local	<u>68</u>
		Directory	46
C		directory access	<mark>67</mark>
С		Directory Entry Properties windows	
call details	15	display	
call history		normal	11
Call History		display fields	<u>67</u>
		door	
call history pane		control	69
call recording		door name	
call tagging		door release	
calling		DTMF digits	
calls in queue	<u>//</u>	D TWI digito	<u>oc</u>
change	4.5	_	
language	<u>10</u>	E	
changing	<b>=</b> .		
hunt group status		editing	_
user status		local directory entries	<u>50</u>
changing conference room views	44		

F	login window
	settings9
fields	longest wait time
alarm <u>77</u>	seconds <u>77</u>
directories tab <u>67</u>	look-and-feel <u>62</u>
Follow Me <u>55</u>	
Follow Me status <u>53</u>	NA.
Force Extension Status86	M
Forward on Busy57	main manu
Forward Unconditional56	main menu
Forwarding status53	main window
orwarding status	Make Call screen28
	making calls <u>27</u> , <u>59</u>
G	media files <u>50</u>
	menu bar <u>17</u>
get started <u>61</u>	mobile twinning <u>54</u>
group	mode
hunt <u>75</u>	Administrator84
Group Service Status86	monitor
groups	queues
BLF63	7222
<u>50</u>	
	N
H	
	name
hide on close <u>78</u>	door <u>69</u>
history	No Answer <u>57</u>
call	normal view13
hold	
hot keys	
hunt groups	0
queue monitor	
queue montor <u>ro</u>	opening controlled doors <u>35</u>
I	Р
i	
icon arrangement	paging <u>38</u>
IM	panel
incoming calls23	call <u>15</u>
instant messages <u>37</u>	details15
instant messaging <u>79</u>	park slot
intruding on calls <u>35</u>	parking calls
	play media file
V	pop
K	preferences
kovboord	
keyboard	profile
alphabetic	edit
mapping	load <u>81</u>
numeric <u>70</u>	save <u>78</u> , <u>81</u>
shortcuts <u>71</u>	profiles
L	Q
languago 40	
language <u>10</u>	queues <u>33</u> , <u>34</u>
languages	
support <u>10</u>	R
local directory <u>68</u>	••
local directory entries <u>50</u>	reclaiming calls32
log in <u>9</u>	recording calls39
	<u></u>

# Index

requirements	templates <i>(continued)</i>	
computer <u>8</u>	default	<u>82</u>
PC <u>8</u>	text messages	<u>36</u>
setup8	toggling between views	13
telephony8	toolbar	
returning to held calls32	Transfer	
room	transferring calls	
conference65	supervised transfers	
<u>00</u>	to voice mail	
	unanswered calls	
S		<del></del>
	Troubleshooting	
save	twinning	<u>54</u>
as new profile		
automatic <u>78</u>	U	
automatic save81		
current profile changes81	unanswered calls	25, 86
prompt	unparking calls	
screen	unsupervised transfers	
login9	user profile	
script file	220. promo	<u>02</u>
script files		
search results	V	
display fields	view	
sending email37	normal	<u>11</u>
sending instant messages <u>37</u>	viewing	
sending text messages <u>36</u>	call history	<u>13</u> , <u>59</u>
setting	viewing conferences	41
alarm <u>77</u>	voicemail messages	39
language <u>10</u>	3	
mobile twinning <u>54</u>	147	
settings	W	
login <u>9</u>		0-
SoftConsole61	warning screen	<u>81</u>
setup <u>61</u>	window	
shortcut keys	login	<u></u>
BLF		
call control		
shortcuts		
keyboard		
sign in9		
sigit iii <u>9</u>		
park <u>73, 74</u>		
SoftConsole		
overview		
setup		
sound file		
speed dialing <u>30</u>		
status bar <u>17</u>		
_		
Т		
tagging calls <u>34</u>		
telephone support <u>8</u>		
template		
create <u>82</u>		
new <u>82</u>		
templates <u>81</u>		
•		