IP Office

SoftConsole User Guide

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SoftConsole

1. SoftConsole

SoftConsole is an application intended for receptionists and operators who answer and distribute calls. It provides a range of call controls through the user's computer. It also allows the recptionist to see the status of other users and to adjust some basic telephony settings of other users such as forwarding numbers.

The user still requires a physical extension which is used to provide the speech path for calls. The SoftConsole is not supported with PC softphone applications.

Language Support

SoftConsole supports the following languages. The language used can be selected by the user when running SoftConsole.

- Brazilian, Chinese (Simplified), Danish, Dutch, English, Finnish, French, German, Italian, Korean, Latin Spanish, Norwegian, Portuguese, Russian, Spanish and Swedish.

Additional Requirements

Sound and media files can be associated with calls. If this feature is to be used then the PC requires a sound card and speakers to be installed.

1.1 Starting SoftConsole

You must login to SoftConsole before you can use the application. The **Login** window contains details so that SoftConsole can communicate with the telephone system. If you are unable to login, see your system administrator.

To start SoftConsole:

1. Click **Start > Programs > IP Office > SoftConsole**. The Login window opens.

2. In the **User Name** field, type your extension number or user name. The user name is case sensitive. Alternatively, select the details from the User List 10 window.

3. In the **Password** field, type your password if you have one set. This is given to you by your system administrator and is case sensitive.

4. Check that the IP Address field contains the IP address or name of the telephone system. Click Browse to select a different system 11.

5. Click **OK**. The SoftConsole main window 12 opens.

Note

If directory access to Microsoft Outlook contacts folder was selected in the directories configuration form, a Microsoft Outlook warning screen might open. If the warning screen opens:

1. Select **Allow access for**.

2. Click an amount of time in the list.

3. Click **Yes**. Yes must be selected to allow SoftConsole to retrieve Outlook contacts.

1.2 The User List Window

The User Name\Extn field in the Login window can be completed by selecting the details from a list.

To open the User List window:

1. At the Login window click **User List**. The **User List** window opens.
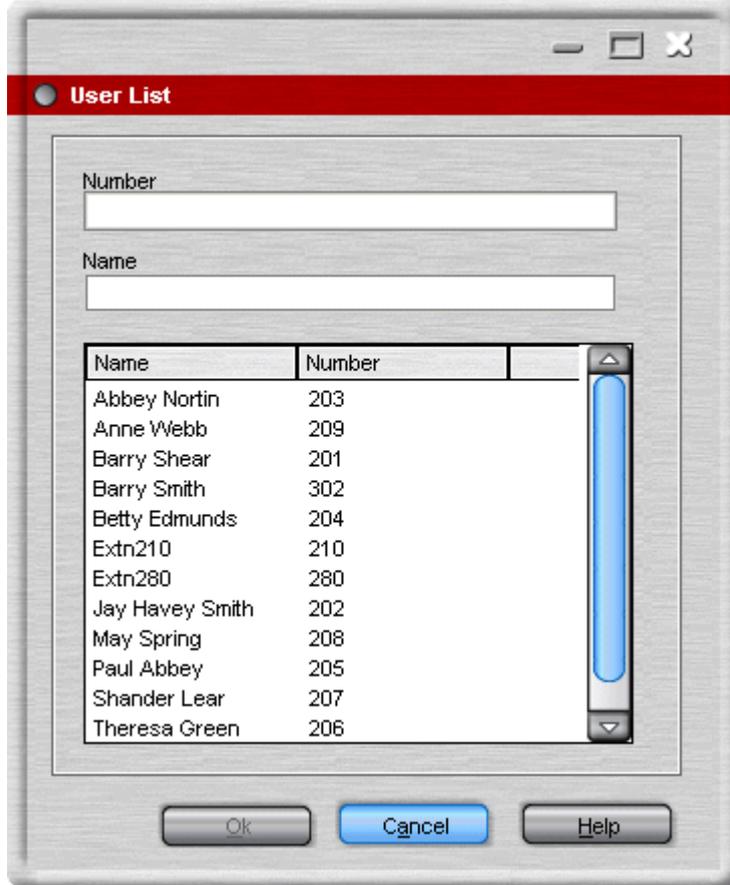
2. Start typing the name. Only the matching entries are listed.

3. Click the required entry. The **Number** and **Name** fields are completed.

4. Click **OK** to return to the Login window. The details you selected are entered in the **User Name** field.

1.3 Control Units

If there is more than one telephone system available, you can select the unit to be connected.

To select a Unit:

1. In the SoftConsole Login window, click **Browse**.
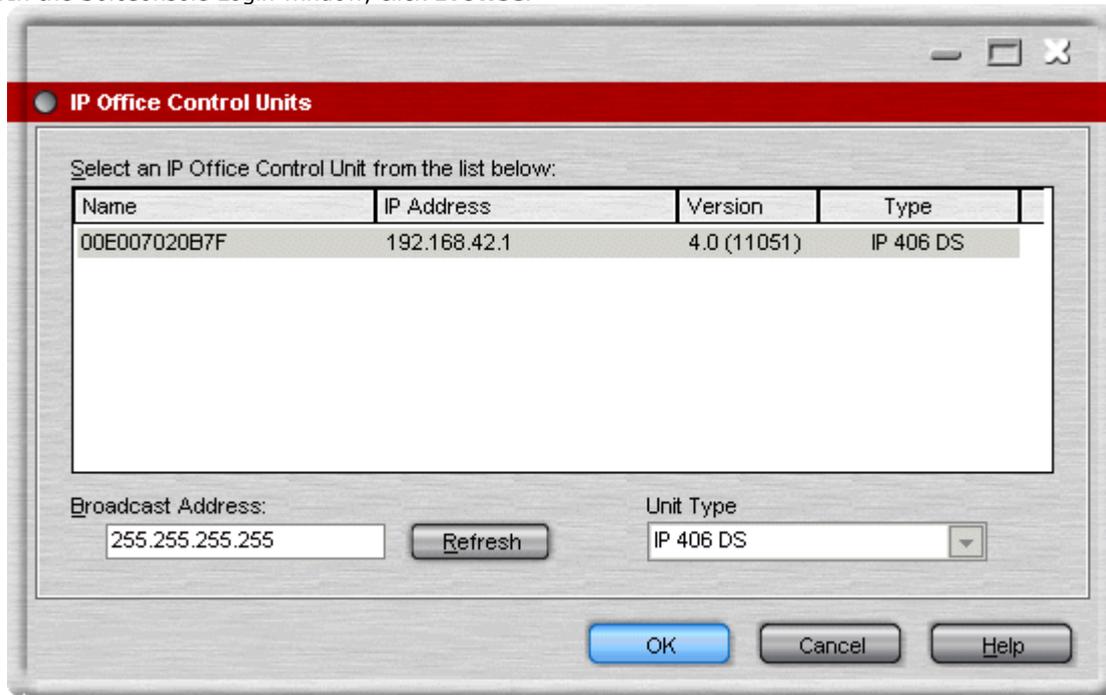
2. Highlight the required unit in the list.

3. Click **OK**. If the required system is not listed, see your system administrator.

1.4 The Main Window

The SoftConsole main window is configurable. The parts of the screen that you see when you login depends on your profile. For more information, see Saving your Profile 53ª. If you view the call history the Held Calls and BLF Panels are replaced with the Call History panel. For more information, see Viewing the Call History 15ª. The picture shows all the different parts of the application that are available.
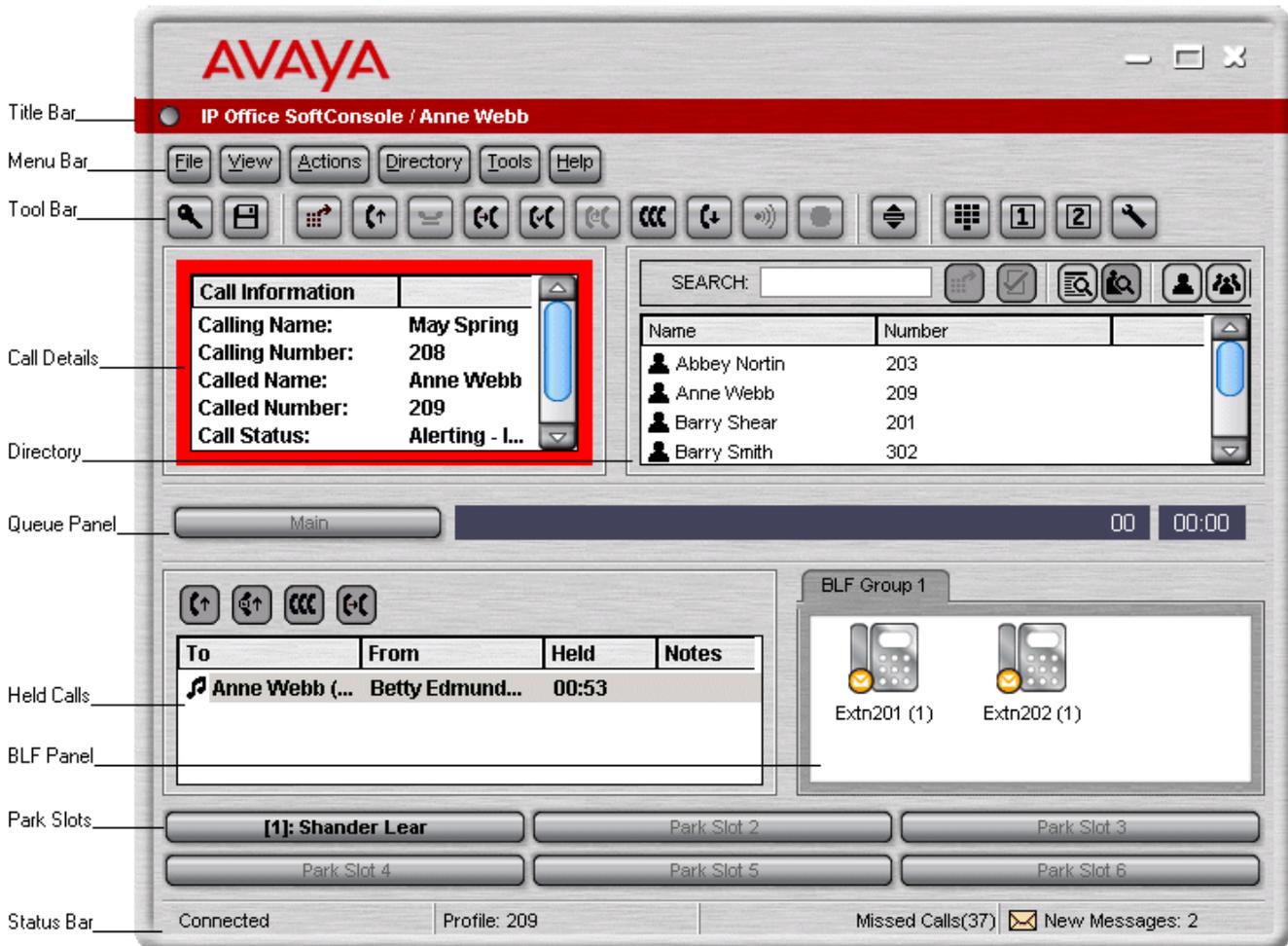
The SoftConsole main screen is divided into the following areas:

- **Title Bar** 57ª
  The Title Bar contains the name of the person who is logged in to SoftConsole. When SoftConsole is the active program, the title bar is shown in Orange. If SoftConsole is not the active program, the title bar is purple. Screen colours are different if an alternative skin is applied.

- **Menu Bar** 21ª
  Commands & actions are available through menus. Some items are only accessible when the right conditions occur, for example, when a call is received.

- **Toolbar** 79ª
  The toolbars provide short cuts for options that are frequently used.

- **Call Details Panel** 18ª
  The panel contains a side-by-side display of current call information. The panel on the left contains details of the current call. The panel on the right contains the directory and individual extension details. It can also contain a script file and conferencing information.

- **Queue Panel** 38ª
  The Queue panel displays graphical information on the status of calls held in queues.

- **Held Calls Panel** 36ª
  Any calls that are being held are listed in the Held Calls panel.

- **BLF Panel** 17ª (Busy Lamp Field Panel)
  The icons represent dialable numbers. If the icons represent internal users, the user's status is indicated.

- **Park Slot Panel** 37ª
  The park slot panel can contain up to 16 park slot buttons.

- **Status Bar** [20]
  The status bar confirms that you are connected to the telephone system and the profile that you are using. There is also an indication to the number of new messages and missed calls that you have had.

1.5 Views

SoftConsole can be run in compact or normal view modes. In compact mode, none of the panels below the calls details and directory are shown. The queues, held calls and BLF panels are hidden, as can be seen in the example.

To toggle between the views:

1. Click ⬍ to toggle between compact and normal view. Alternatively, click **View > Compact View** or **Normal View**. Press **Home** on your keyboard to toggle between the compact and normal views.
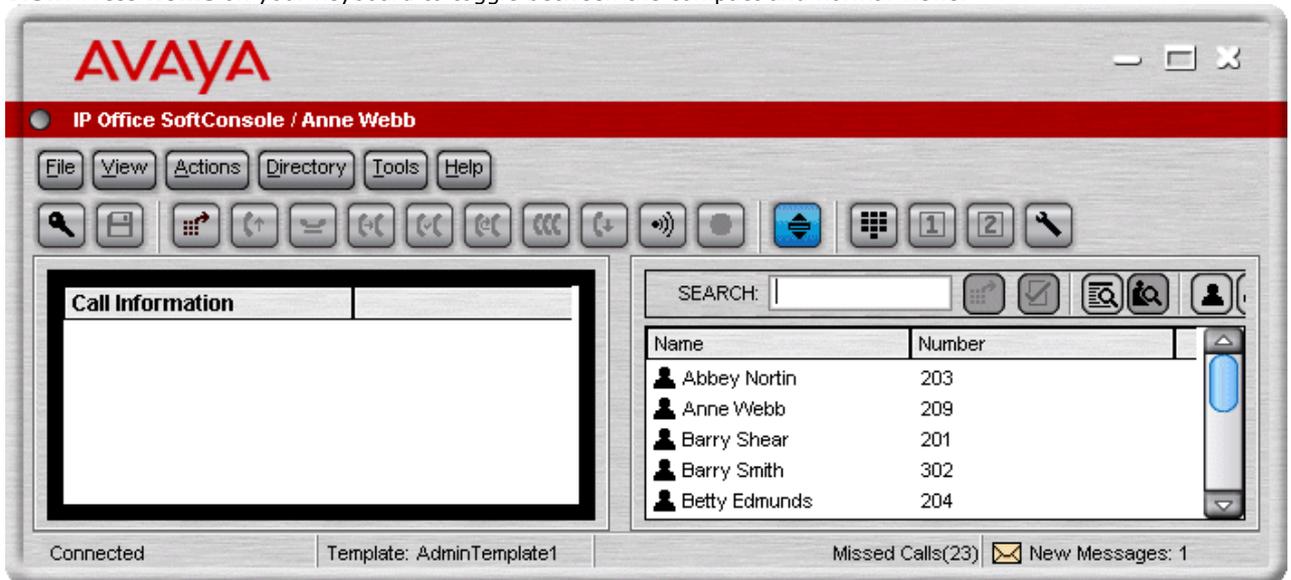
1.6 Viewing the Call History

The Call History pane replaces the BLF and Held Calls panels. The Call History Panel can not be viewed at the same time as the BLF and Held Calls panels. If the profile loaded does not contain the BLF and Held Call panels, you can not view the Call History. For example, when the AdminTemplate3 default template is used you can not view the Call History panel.

To view the call history:

1. Click **View > History**. The Call History details replace the BLF and Held Calls panels.

	Number	From	To	Tag	Date & Time
!	206	Theresa Green	Anne Webb		19/10/2006 15:12:01
!	210	Paul Jones	Anne Webb		19/10/2006 15:12:24
(	209	Anne Webb	?Anne Webb		19/10/2006 15:12:50
(	209	Anne Webb			19/10/2006 15:14:33
)	206	Theresa Green	Anne Webb		20/10/2006 08:53:50
!	206	Theresa Green	Anne Webb		20/10/2006 08:55:09
)	206	Theresa Green	Anne Webb		20/10/2006 08:56:07
(	209	Anne Webb	May Spring		20/10/2006 09:06:28
!	210	Paul Jones	Anne Webb		20/10/2006 09:14:26

Tabs: In(11) Out(15) ! Missed(14) All(37)

2. The **Call History Pane** is divided into the following tabs:

- **In** - Lists all calls received at your extension.

- **Out** - Lists all calls made from your extension.

- **Missed** - All the unanswered calls to your extension.

- **All** - Lists all the incoming, outgoing and missed calls.

3. Each tab displays a maximum of 100 calls. When the maximum capacity is reached, the oldest record is deleted when a new record is added. The number in brackets on the tab shows the number of calls listed. Within each tab there are the following fields:

Field	Description
Call Status Icon	(- indicates a call that was made from your extension - an outgoing call.) - indicates a call that was made to your extension - an incoming call. ! - indicates a call that was not answered - a missed call.
Number	Either the incoming telephone number or the telephone number that was called. If the call was an internal call, just the extension number is listed. To make a call double-click on the telephone number.
From	The name that is associated with the Number in the directory on the main system or your Local Directory. For more information, see your system administrator.
To	The name that is associated with the called number in the Directory on the main system or your Local Directory. For more information, see your system administrator.
Tag	Text that was entered to identify the call. Any calls that you annotate have the text recorded in this area. For more information, see Adding Text to a Call 45.
Date & Time	The date and time that the call happened.

The following options are available when you right-click within a tab:

- **Clear** - The call information listed in the current pane is cleared.

- **Clear All Tabs** - The information listed in all the Call History tabs is cleared.

To return to the Held Calls and BLF panels view:

1. Click **View > Call History**.

1.7 Add Members to a BLF Group

Members can be added to a BLF Group from the BLF Panel within the Main window.

To add a member to a BLF Group:

1. View the BLF Group in which the members need to be added.

2. Right-click within the BLF Panel.

3. Highlight New, click BLF Group Member. The New BLF Group Member dialog box opens.

4. Enter the name and the extension number.

5. Click **OK** to return to the BLF panel.

BLF Members can also be added by:

- Click within the BLF Panel and press **Ctrl+Alt+B** to open the New BLF Group Member window. Enter the name and extension number. Click **OK** to return to the BLF Panel.

- Double-click within the BLF Panel to show the **Edit BLF Group Properties** window. Add members as required. Click **OK** to return to the BLF Panel.

1.8 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.
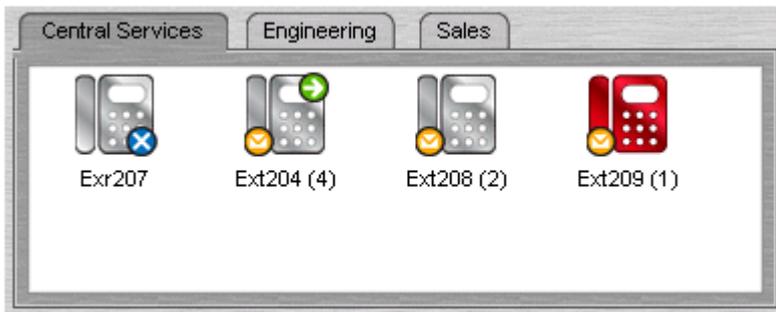
The panel uses tabs to group different sets of icons. You can switch between the groups by clicking the tab name.

The icons used for another internal user are:

- **Unread Voicemail Messages**
  A yellow envelope indicates that the user has unread voicemail 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 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.

To use a BLF Icon as a speed dial:

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

To change the icon view:

1. Right-click the BLF Panel and select View.

2. Select the view type required.

- Large Icons (Ctrl+Alt+G)

- Small Icons (Ctrl+Alt+S)

- List Icons (Ctrl+Alt+I)

- Details (Ctrl+Alt+D)

To change the icon arrangement:

1. Right-click the BLF Panel and select Arrange.

2. Select the way you want to arrange the icons.

- Name Order (Ctrl+Alt+N)

- Number Order (Ctrl+Alt+M)

- Status Order (Ctrl+Alt+U)

- New Messages Order

- Horizontally (Ctrl+Alt+H) - Available in small icons or large icons view.

- Vertically (Ctrl+Alt+V) - Available in small icons or large icons view.

1.9 Call Details Panel

The Call Details panel contains a side-by-side display of current call information. A slider positioned between the two panels allows the operator 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, it contains details of that call.

Call Information	
Calling Name:	Betty Edmunds
Calling Number:	204
Called Name:	Anne Webb
Called Number:	209
Call Status:	Alerting - Incoming
Duration:	00:02

If you have multiple call appearances set, additional calls can be shown when they arrive. Clicking the separate calls has the same effect as pressing the matching call appearance buttons on the telephone.

To	From	Notes
⬌ Anne Webb (209)	Betty Edmunds (204)	
⁾ Anne Webb (209)	Shander Lear (207)	

Details that can be shown for a single call are:

- **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 the incoming call was routed to by the telephone system. Usually this is the SoftConsole user's own number or that of an operator group.

- **Call Status**
  States the progress of a call. The border around the Call Details Panel changes color to indicate the status of a call. For more information, see Appearance tab 57 in the Configuration section.

    - **Red** - Alerting incoming call or alerting outgoing call.

    - **Green** - Connected call, or call still being dialed.

    - **Yellow** - Returned call. For example, a held call that has timed out from hold.

    - **Black** - Idle.

- **Duration**
  The length of time that the call is in its current state, for example ringing, connected, or held.

- **Notes**
  This area displays notes or information about the call. For example, when a call returns the reason for the return is shown. If annotation is attached to the call, the annotation is shown here. For more information, see Adding Text to a Call 45 in the Features section.

Directory

The panel on the right usually displays the directory. Using search you can show details of an individual entry.
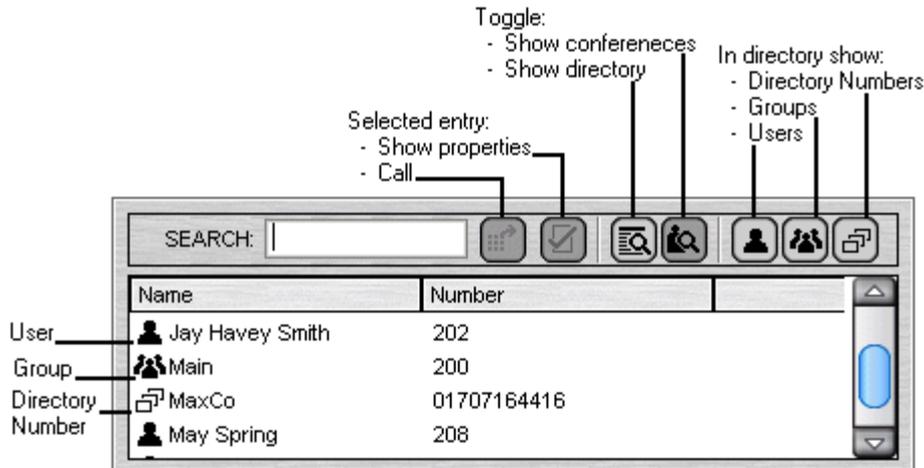
The directory can show:

- Directory entries including internal users, internal groups, numbers from the telephone system directory and numbers from the SoftConsole directory. Note: Changes to telephone system user, hunt group and directory entries are only updated when the SoftConsole is restarted.

- Full properties and status of an individual user or group when double-clicked or when they are the only remaining search match.

- A script file when the calling number of a call matches a SoftConsole directory number with an associated script.

1.10 The Status Bar

The status bar confirms that you are connected to the telephone system and the profile that you are using. There is also an indication of the number of new messages and missed calls that you have had.

| Connected | Profile: 209 | | Missed Calls(36) | ✉ New Messages: 2 |

You are connected to the telephone system | The profile being used | The number of call that have been missed | The number of new voicemail messages

Any new personal voicemail messages or messages for the hunt group that you are a member are indicated. You can collect your personal voicemail messages and any hunt group messages from the status bar. The number of new messages indicated is the totals of new voicemail messages for the personal as well as all the configured hunt group mailboxes which you are a member of.

To collect your messages:

1. Double-click the area that shows the number of new messages.

   - If you have at least one hunt group mailbox configured the Messages screen opens. All your mailboxes are listed. The number of new messages is shown against each mailbox. Double-click a mailbox to collect the new messages. You are connected to the Voicemail server as soon as it is located.

   - If you only have a personal mailbox you are taken directly into your mailbox. You are connected to the Voicemail server as soon as it is located.

2. If you are using your own extension, press #. Otherwise enter your extension number and press #.

3. Enter your voicemail password and press #.

4. When you have successfully logged in to your mailbox, you hear an announcement to tell you about the messages that you have. Press 2 to receive your messages. Follow the voice prompts to listen, save or delete your messages.

1.11 The Main Menu Bar

At the top of the screen is the main menu bar.

Each menu can be opened by clicking the menu button. You can also open the menu by pressing ALT and the underlined letter for the required menu. For example, press ALT+A to open the Actions menu.

The options available in each menu are:

- **File**
  Save the current SoftConsole setup as a personal profile, login with a different profile or exit the SoftConsole.

- **View**
  Select to run SoftConsole in full or compact mode. Also, select the display language and whether to show or hide the toolbar. If logged on in administrator mode, the BLF, held calls and park slots panels can also be selected as shown or hidden. The option to view the call history is also available.

- **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.

- **Directory**
  Options to view to search, export and setup the directory.

- **Tools**
  This menu gives access to menus for the Dial Pad, Door Release, Send Email, View Conference Rooms, Call Voicemail and to configure the SoftConsole.

- **Help**
  Access to the help system and details about Avaya SoftConsole.

1.12 Directory Entry Properties

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.

- A user is indicated by the icon 👤. For more information, see [The User Directory Entry Form](#) 26.

- A directory entry is indicated by the icon 🗗. For more information, see [The Directory Entry Form](#) 23.

- A group is indicated by the icon 👥. For more information, see [The Group Service Status Form](#) 25.

  - For large hunt groups, the SoftConsole is currently limited to showing only the first 102 group members.

- Note: If the settings are updated by another method, for example using another application or through the users phone, the values shown in the SoftConsole are not automatically updated if already being displayed. The values displayed in the SoftConsole directory are those current when the user is selected.

To open a Directory Entry Properties form:

1. Click an entry in the directory.

2. Click ☑. The **Directory Entry Properties** form is shown for the selected entry.

3. Double-click a directory entry to see the properties in the directory panel. Double-click on the properties to show the details in a directory properties form

1.12.1 The Directory Entry Form

The Directory Entry form that opens depends on whether the number is from the telephone system directory or from the SoftConsole directory. The directory numbers that can be changed are:

- Telephone system directory numbers 23
- SoftConsole Directory numbers 24

- Note: If the settings are updated by another method, for example using another application or through the users phone, the values shown in the SoftConsole are not automatically updated if already being displayed. The values displayed in the SoftConsole directory are those current when the user is selected.

To open a directory entry properties form:

1. Click ⬚ in the SoftConsole directory panel.

2. Click ☑.

Telephone System Directory Number

The telephone system with which SoftConsole is working includes a directory of names and numbers. These are used both for outward dialling 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.
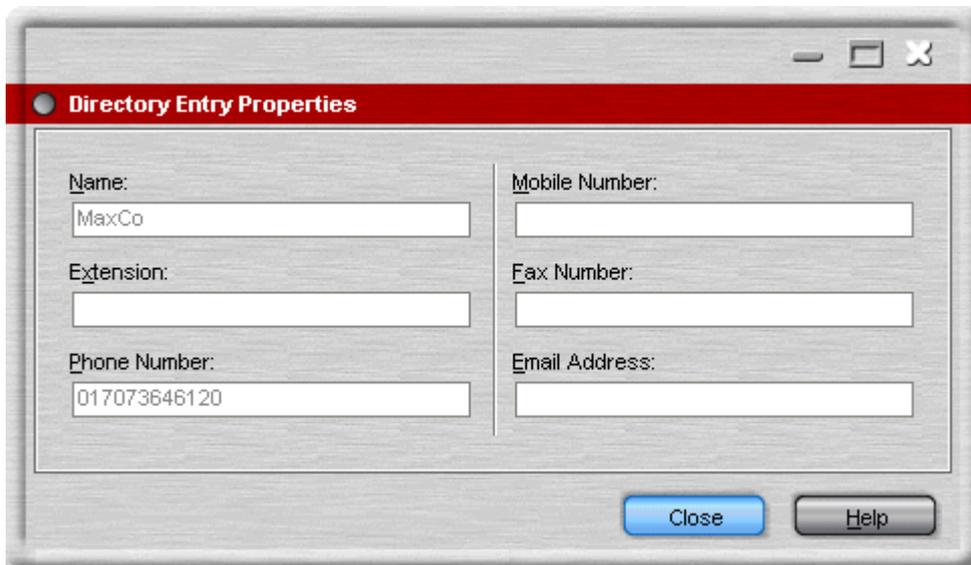
The only fields used for an telephone system directory number are the **Name** and **Phone Number**. These can not be changed through the SoftConsole.

SoftConsole Directory Number

SoftConsole has a local directory that can be used for outgoing dialling and to match a name to an incoming call. When a name match exists in both the telephone system directory and the SoftConsole directory, the name in the SoftConsole directory is shown on the SoftConsole. For more information, see <u>Incoming Calls Tab</u> ⌐63⌐.
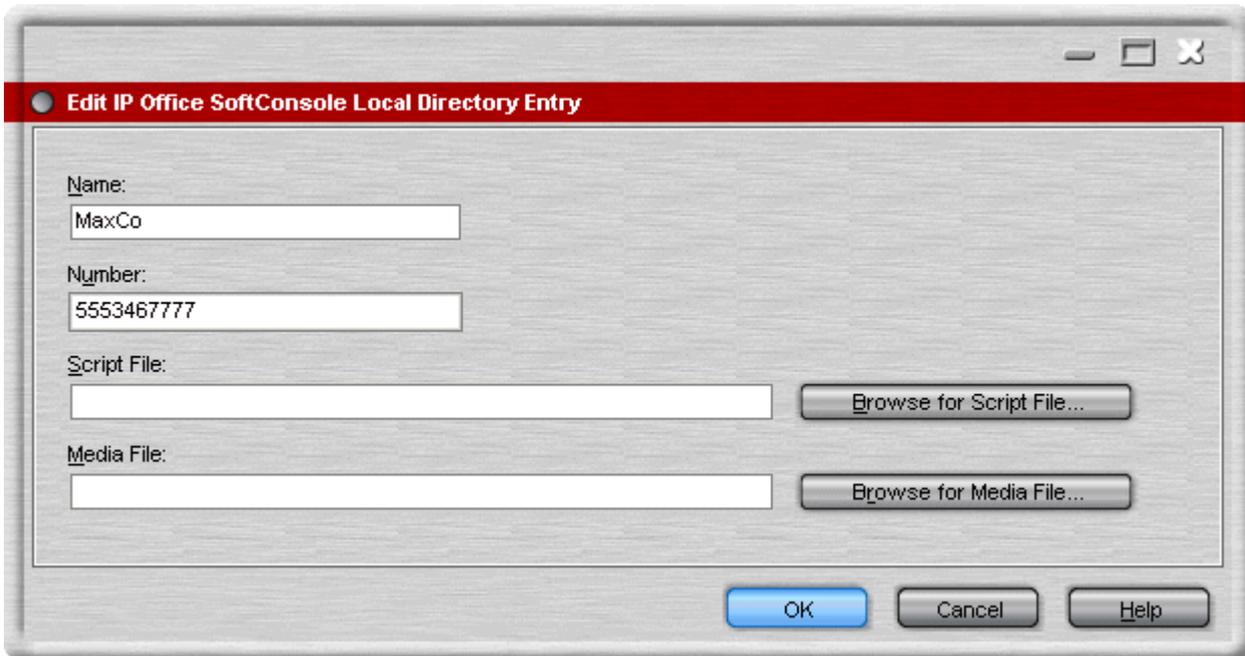
The fields that can be changed are:

- **Name**
  The name to show in the SoftConsole directory and on incoming calls where the calling number matches the number set.

- **Number**
  The number to associate with the name. On some systems this number needs to include an external dialling prefix.

- **Script File**
  A simple script file, in either .txt or .rtf format, can be associated with the directory number. When an incoming calling number matches a directory entry, the script file is displayed in the directory panel.

- **Media File**
  A media file such as .wav files can be associated with the directory number. When an incoming calling number matches a directory entry, the media file is played. Distinctive sounds can be associated with calls matching particular directory numbers.

1.12.2 The Group Service Status Form

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

- Note: If the settings are updated by another method, for example using another application or through the users phone, the values shown in the SoftConsole are not automatically updated if already being displayed. The values displayed in the SoftConsole directory are those current when the user is selected.

To open a group directory entry properties form:

1. Click 👥 group in the SoftConsole directory panel

2. Click ☑. The **Group Service Status** window opens.
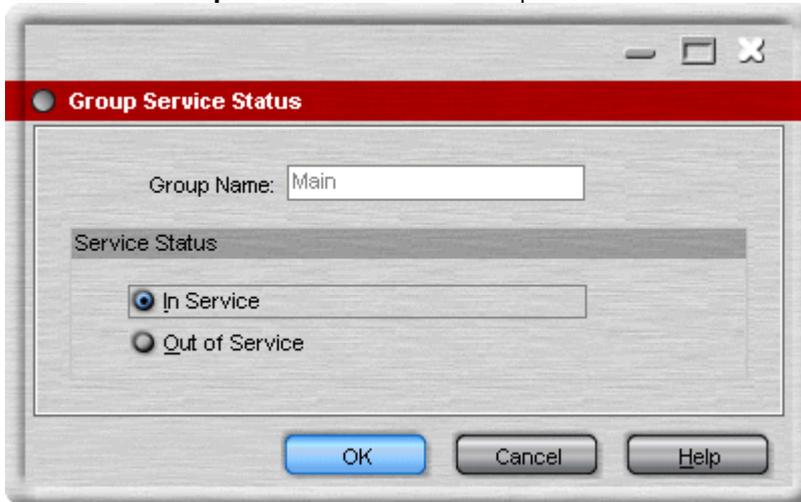
- **Group Name**
  The name of the group being viewed.

- **Service Status**
  You can change a hunt group's status between In Service or Out of Service. Depending on the telephone system configuration, when Out of Service, calls go either to another destination or to voicemail. The ability to use this feature is not enabled by default.

Note

- A third status setting, **Night Service**, is set either automatically by time settings or by the use of special dialling codes.

1.12.3 User Directory Properties

You can change the Do Not Disturb status, bar the user from making outgoing calls, alter the group status for individual groups and change the forwarding settings.

To open a Users directory entry properties form:

1. Click 👤 in the SoftConsole directory panel.

2. Click ☑. The Directory Entry Properties window opens.
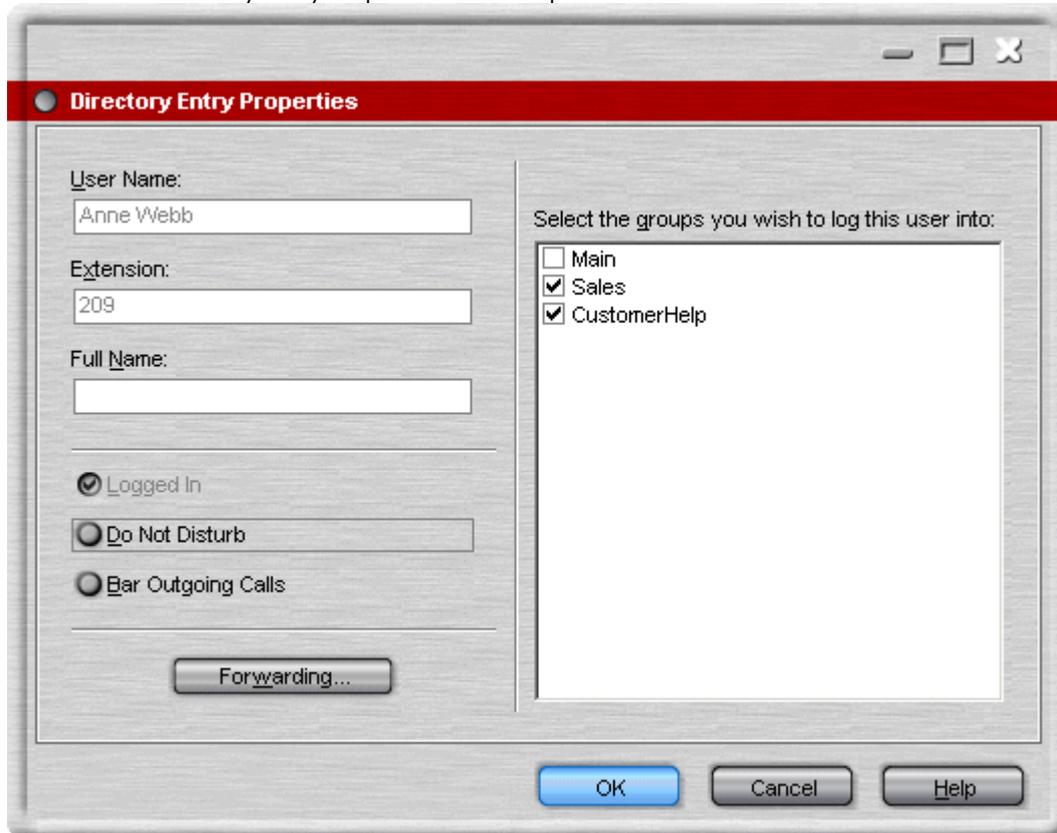
3. Some field details can not be changed. Details that are not changeable are:

   - **User Name**

   - **Extension**

   - **Full Name**

   - **Logged In**
     The check box shows the users current logged in state.

4. The operator can change potentially change the following details. The ability to use this feature is not enabled by default.

   - **Do Not Disturb**
     Shows whether the user is on Do Not Disturb.

   - **Bar Outgoing Calls**
     The SoftConsole operator can control whether a user can make outgoing calls.

   - **Forwarding Button**
     Click this button to display the users forwarding settings. For more information, see The Forwarding Status Window 29ᐟ.

   - **Group Status**
     A list of the hunt groups that the user belongs. If the group is checked, the user is 'in group'.

1.12.3.1 Follow Me and Forwarding Behaviour

Calls to an extension can be diverted to a different telephone number either internal or external. You can enter the destination telephone number and select whether all calls are redirected or only external calls.

The types of forwarding that can be selected are:

- Follow me 27 .
- Forward unconditional 28 .
- Forward on busy 28 .
- Forward on no answer 28 .

Follow Me

When selected, ALL your calls are forwarded to the entered 'Follow Me' extension number. This is used for temporary redirection when you are away from your own extension but are available on another extension. You must enter an internal extension number as the Follow Me destination.

- Calls can be made 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 the Follow Me destination extension is busy or there is no answer, the call is transferred to your voicemail.

- 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 as your absent message has priority. For more information, see Setting an Absent Message.

If you have forwarding options selected, the Follow Me behaviour can change.

Forwarding Options Selected	Follow Me Behaviour
Forward Unconditional	Setting is ignored when Follow Me is selected.
Forward on Busy	If the Follow Me destination extension is busy, the call is forwarded to your Forward on Busy destination. If there is no answer at the Forward on busy extension then the call is transferred to your voicemail, if available.
Forward on No Answer.	If there is no answer at the Follow Me destination extension the Forward on no answer setting is ignored and the call is transferred to your voicemail, if available.

Note

- If an option is selected, but there is no destination entered, the option is ignored. For example, Anne Webb (ext 206) diverts all her calls to extension 207 using Follow Me. There is an incoming call for Anne.

Scenario	Forward on Busy/No Answer options selected	No Forward options selected
Extension 207 is busy.	Caller is transferred to Anne's Forward on Busy number specified.	Caller is transferred to Anne's voicemail.
There is no answer at extension 207.	Caller is transferred to Anne's voicemail.	Caller is transferred to Anne's voicemail.

Forward Unconditional

If Forward Unconditional is selected and a destination number entered, ALL your calls can be re-directed. The destination can be an extension number or if enabled an external number. For more information, see your system administrator.

- The Forward Unconditional option is ignored when the Follow Me option is selected.

- If the option Forward Hunt Group Calls is selected it only applies to hunt groups that are configured for sequential or rotary ringing mode. For more information, see your system administrator. It includes internal calls to the hunt group regardless of the Forward Internal Calls setting.

- The options 'Forward on Busy' and 'Forward On No Answer' are unavailable.

- You can still make outgoing calls from your extension. The only calls that you can receive when all your calls are forwarded are calls made from the Forward unconditional destination 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 as your absent message has priority. For more information, see Setting an Absent Message.

Forward Unconditional	Forward Hunt Group Calls	Forward Internal Calls	Call Behaviour
✔	✔	✔	All calls are redirected to the Forward Unconditional destination number.
✔	✔	✖	External calls and hunt group calls received by your extension are redirected to the Forward Unconditional destination number. Internal calls are presented to your extension.
✔	✖	✖	External calls are redirected to the Forward Unconditional destination number. Internal calls, including any hunt group calls, are presented to your extension.

Forward on Busy / No Answer

When selected 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.

- If either the Forward on Busy or Forward on No Answer options are selected and no forward number entered, the calls are forwarded to the number set in the forward unconditional section.

- The first time Forward on No Answer is selected, 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 No Answer forwarding option is selected. If Absent text is active at the destination extension it will not be displayed as your absent text has priority. For more information, see Setting an Absent Message.

- If you have set an absent message, the text is displayed to callers when the Forward on Busy forwarding option is selected. If Absent text is active at the destination extension your absent text will not be shown. The destination extension's absent text has priority. For more information, see Setting an Absent Message.

Forward on Busy	Forward on No Answer	Forward Internal Calls	Call Behaviour
✔	✖	✖	External calls are forwarded to the specified number when your extension is busy. Internal calls are transferred to your voicemail, if available.
✔	✖	✔	All calls (internal and external) are forwarded to the specified number when your extension is busy.
✖	✔	✖	External calls are forwarded to the specified number when your extension is not answered. Internal calls are transferred to your voicemail, if available.
✖	✔	✔	All calls (internal and external) are forwarded to the specified number when your extension is not answered.
✔	✔	✖	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.
✔	✔	✔	All calls (internal and external) are forwarded to the specified number when your extension is not answered or is busy.

1.12.3.2 Setting Follow Me and Forwarding

You can view and change the forwarding status of a user. Calls to an extension can be diverted to a different telephone number either internal or external. You can enter the destination telephone number and select whether all calls are redirected or only external calls. For more information, see Follow Me and Forwarding Behaviour 27. Mobile twinning can also be set in this window. For more information, see Mobile Twinning 30.

- Note: If the settings are updated by another method, for example using another application or through the users phone, the values shown in the SoftConsole are not automatically updated if already being displayed. The values displayed in the SoftConsole directory are those current when the user is selected.

To configure the forwarding options:

1. Click the required user 👤 in the SoftConsole directory panel.

2. Click ☑.

3. Click **Forwarding**. The **Forwarding Status** window opens.

4. Type the destination telephone numbers in to the appropriate fields. Available numbers can also be selected from your directory list.

   - Right-click in a number field. The **Forward Follow-me Number** window opens.

   - Select the telephone number required from the listing.

   - Click **Add**.

5. Click **OK** to save your changes.

Notes

- For call appearance users 'Forward On Busy' is only used when all their call appearance buttons are busy.

- Some forwarding options require configuration within the telephone system, for example a user might be barred from making outgoing calls. For more information, see your system administrator.

- You must enter an internal extension number as the Follow Me destination.

1.12.3.3 Mobile Twinning

If twinning is enabled in the telephone system, any incoming calls ring the extension number <u>and</u> the external 'twinned' number. For example, a user's extension number rings as well as their mobile telephone. The call can be answered from either the extension or mobile telephone. For more information, see your system administrator.

Notes

1. Mobile Twinning is a licensed feature.

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

3. If the feature Do Not Disturb (DND) is selected any callers to the internal extension will hear the busy tone. The user's external telephone will not ring. If a caller is entered in to the DND exception list only the internal telephone rings. As a SoftConsole operator you can not add numbers to DND exception lists.

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

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

- Note: If the settings are updated by another method, for example using another application or through the users phone, the values shown in the SoftConsole are not automatically updated if already being displayed. The values displayed in the SoftConsole directory are those current when the user is selected.

To set mobile twinning:

1. Click the required user ♟ in the SoftConsole directory panel.

2. Click ☑.

3. Click **Forwarding**. The Forwarding window opens.

4. Select **Mobile Twining**.

5. In the **Mobile Twinning** field, enter the telephone number that you want to 'twin' to the user's extension. Telephone numbers must be entered with no spaces.

6. Click **OK** to save your changes.

Chapter 2.
Call Handling

2. Call Handling
2.1 Answering a Call

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

Call Information	
Calling Name:	Company One
Calling Number:	01707364416
Called Name:	Anne Webb
Called Number:	209
Call Status:	Alerting - Incoming
Duration:	00:05

COMPANY ONE

All calls are to be announced

General Enquiries - Extension 123

Close Script

To answer the call:

1. Use any of the following methods:

   - Press **Enter**.

   - Click [icon].

   - Click **Actions > Answer Call**.

   - Pick up the handset if using your telephone.

   - Double-click in the Call Details Panel.

2. When a call is answered the caller information is outlined in green. If a script is showing, to remove it, click the **Close Script** button or press **Enter** again.

2.2 Making an Outgoing Call

There are several ways to make a call from SoftConsole.

To make a call:

1. Use one of the following methods:

   - 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 see the Make Call screen.

Using the Make Call Screen:

1. When you click ⠿↗ or press **F12**, the Make Call screen opens.
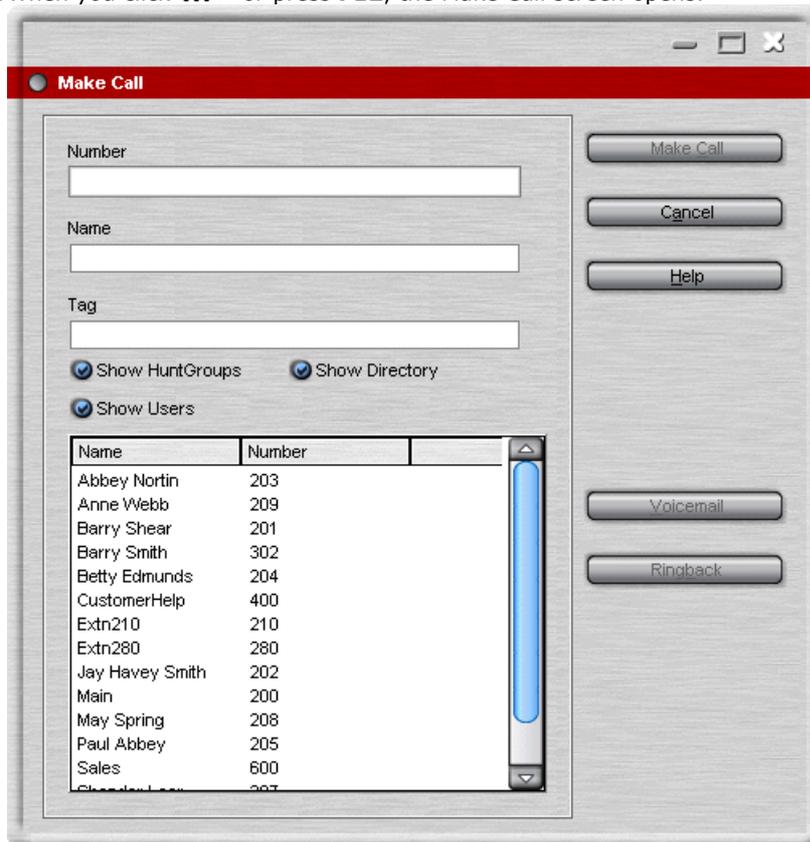
2. Select the directory that you want to search. You can select more than one directory.

3. Start entering the name in the Name field. The entries that match the text entered are shown. When the required number can be seen in the listing, 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. (Optional) Enter a Tag message. For more information, see in the Features section.

5. Select the required action:

   - **Make a Call** - Place a call on the selected number.

   - **Voicemail** - Leave a message for the user.

   - **Ringback** - When an extension number is busy, click Ringback. When the extension becomes free, it rings your extension.

2.3 Unsupervised Transfers

You can transfer a call by:

- Pressing **F2**.

- Click **Actions > Transfer Call**.

- Drag & drop the call on to the extension within the Directory panel.

- Drag & drop the call on to the required BLF.

You can be configured to have unanswered calls returned. For more information, see your system administrator. When a call is returned, **(NoAns)** is shown in the Call Details panel.

To transfer a call without answering it:

If you recognizes a calling name or number, the incoming call can be transferred without the call being answered.

1. Enter the destination extension number in the SEARCH field.

   - If the match status is shown as **Busy**, the call can be put on hold against the extension number by pressing **Ctrl+B**. The caller is put on hold against that extension until either the extension becomes free or the system's Park Timeout occurs (by default 5 minutes). The call then returns to the operator indicating why it is being returned, for example, timeout or that the target extension is now free. If free, you can use **Ctrl+R** to re-attempt the transfer 47.

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

2.4 Supervised Transfers

When you need to consult a user to verify that they are free to accept a call, a consultation call is needed. Making a transfer in this way is referred to as a supervised transfer.

To make a consultation call:

1. Enter the extension number or user name in the directory **SEARCH** field.

2. If the 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.

3. Once the call is answered:

   - If the incoming call is accepted for transfer, complete the transfer by clicking or pressing **Ctrl+T**.

   - If the user does not want to receive the incoming call, finish the consultation call by clicking or pressing **End**. Return to the original caller by taking them off hold.

2.5 Transfer a Call to Voicemail

If an incoming caller wants to leave a message for a user, the caller can be transferred to a user's voicemail.

To transfer a call to voicemail:

1. Press **F3**. Alternatively, click **Actions > Voicemail Transfer**. The Voicemail window opens.
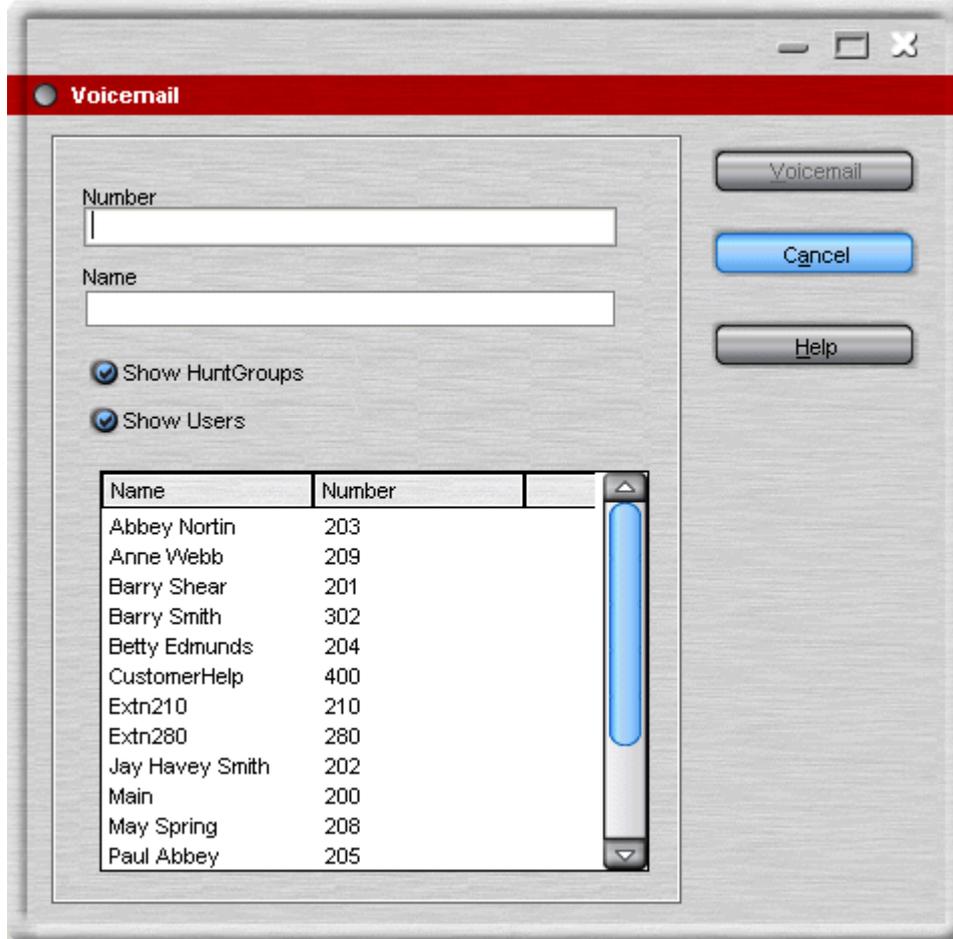
2. Select the directory required. Both **Show HuntGroups** and **Show Users** can be selected.

3. Start entering the name into the Name field.

4. Click **Voicemail** when the extension number appears in the Number field.

Note

- Another way to transfer a call to voicemail is to select the extension number in the directory panel and then press **F3**.

2.6 Using Hold

A call can be put on hold so that you can perform another task. The Held Call Panel contains a list of all the held calls. You can sort the list by clicking the corresponding column header. Clicking a row in the list selects the call so you can answer or transfer the call.

To	From	Held	Notes
♪ Anne Webb (...	Betty Edmund...	00:07	
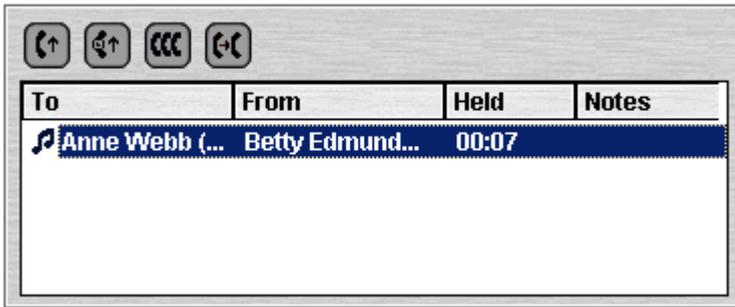
The toolbar at the top of the panel allows the following actions. You can also right-click on the panel to access a pop-up menu for these options.

- **Answer the Selected Held Call**
  Any held call can be answered when the call is in the Held Calls Panel. Select the relevant call and then click this button.

- **Answer Longest Held Call**
  Answers the call that has been held the longest.

- **Conference with Held Calls**
  Creates a conference with the current call and all the held calls.

- **Transfer Held Call**
  Transfers the selected held call (unsupervised transfer)

To place the current connected call on hold:

1. Click 📞 or press **F4**. To hold and answer the next call in one action, press **F7**.

2. Held calls are shown in the Held Calls panel. The time a call will remain on hold, if you are free, is controlled by the telephone system. The default is 15 seconds. For more information, see your system administrator.

2.7 Parking a Call

You might need to temporarily "park" a call to handle some other tasks. An example of parking is where an incoming caller needs to speak to someone urgently but they can not be found. The call can be parked in slot "1", and the specific user paged to pick up the call on "1". For more information, see . Calls remain parked for a specific length of time before being returned to the operator. For more information on the park time, see your system administrator.

SoftConsole provides parking slots for 16 calls, all with a specific park ID. When a call is parked in one of the park slots, the button label provides information about the call. When a park slot is vacant, the button label shows the park slot ID. All operators can see when the call is picked up or ended. Anyone can answer a parked call. For more information, see .

To park a Call:

- When the call is active in the Current Call Information panel, click a vacant Park Slot within the Park Slot panel to park the call. The parked call displays information regarding the call, for example the source number of call.

To Unpark a Call:

- When a call is parked in a Park Slot, click the relevant Park Slot Button to unpark the call.

If a secure parking slot is required for private use, configure the Park ID with text. The call can not be unparked using normal dialling. The call can only be unparked using a park slot button set to the same text. For more information, see .

The default SoftConsole shortcuts are **Alt+F1** to **F12** for buttons 1 to 12 and then **Shift+F9** to **F12** for buttons 13 to 16.

2.8 Collecting a Parked Call

When you park a call, the call can be picked up by any other user who knows the park slot number.

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

- Dial the default short code, ***38*N#** replacing *N* with the park slot number.

- If SoftConsole 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, those buttons can be programmed 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.

2.9 Reclaiming a Call

You can attempt to reclaim the last incoming call presented to the SoftConsole. This includes calls that rang but were then answered elsewhere. The reclaim feature is useful if you suspect a call was transferred to the wrong number or is still ringing unanswered.

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

To reclaim the last call handled:
1. Press **F6** or click **Actions > Reclaim Call**.

2.10 Working with Queues

Calls to a hunt group are held in a queue when all available members of the hunt group are busy or ringing.

For example, a company provides a customer query number. There are 4 people who answer customer queries. A hunt group is created called 'CustomerHelp' containing the 4 extension numbers. All calls to the customer query number are presented to the CustomerHelp hunt group. A caller using the customer query number rings any free extension in the hunt group. If all 4 extensions are already ringing or on a call, the incoming call is put into a queue. When any extension in the CustomerHelp hunt group becomes free, the longest held queued call is presented to the free extension.

As a SoftConsole operator you can monitor any queues. You do not have to be a member of the hunt group to monitor the number of calls being held in a queue. For more information, see Monitoring Queues 38. You can answer a queued call without being a member of the hunt group. For more information, see Answering a Queued Call 38.

- The SoftConsole can only monitor hunt group queues on the same system as the SoftConsole user, it cannot monitor hunt group queues on other telephone systems in a network.

You can configure SoftConsole to monitor up to 8 queues. For more information, see Configuring SoftConsole - Queue Mode Tab 69.

2.10.1 Monitoring Queues

The Queue Mode Panel can display up to eight 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.

When the mouse pointer is moved over an active Queue Call bar information is shown about the queue. The Queue Name, number of calls in the queue, number of Recall calls and the queue status either normal or alarmed is listed.

In the example, the CustomerHelp hunt group has two calls waiting to be answered. One call has been in the queue for 1.15 minutes. The time alarm threshold has not been exceeded as the time is in white numbers. The number of calls in the queue exceeds the alarm threshold as one of the calls is represented by an amber box. For more information, see Configuring SoftConsole - Queue Mode Tab 69.

- The SoftConsole can only monitor hunt group queues on the same system as the SoftConsole user, it cannot monitor hunt group queues on other telephone systems in a network.

2.10.2 Answering a Queued Call

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

To answer a queued call:

1. Click the **Queue Name** button. The first call in the queue is presented to you with the hunt group name shown in the Calling Name field.

2. Answer the call in the normal way.

Note
- If you are a member of a hunt group, a queued call is automatically presented in the Current Call Information panel. The name of the hunt group is shown in the Calling Name field. You can answer the call in the normal way.

2.11 Conferences

A SoftConsole operator can create conferences. They can also add callers to a conference hosted by the telephone system. This can be done is several ways:

- **Conference Held Calls** 42
  The SoftConsole operator can place several calls on hold and then start a conference between those calls.

- **Use Conference Rooms** 40
  SoftConsole has two conference rooms where a conference can be created. The indicated conference users can be invited to join the conference. If Voicemail Pro is installed, the invitation to join a conference is automated.

- **Viewing Existing Conferences and Add Users** 42
  The SoftConsole operator can view all existing conferences and add a caller to any of those conferences.

2.11.1 Using the Conference Rooms

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 members. If Voicemail Pro is available, it can automatically call each party and ask them to join the conference.

Click either button to find out if the conference room is in use. If a conference room is in use, the BLFs in the Conference Room window show the delegates status.

Not Invited.   Invited.   Joined.   Declined.   Unavailable

If the conference buttons are available, you can create a conference. If the buttons are unavailable, the conference room names have not been created. For more information, see in the Configuring SoftConsole section.

To create a conference:

1. Click either **1** Conference Room 1 or **2** Conference Room 2. A conference room window opens. If the conference room is not currently in use, the window is blank. If it is in use, the current members of the conference are shown.
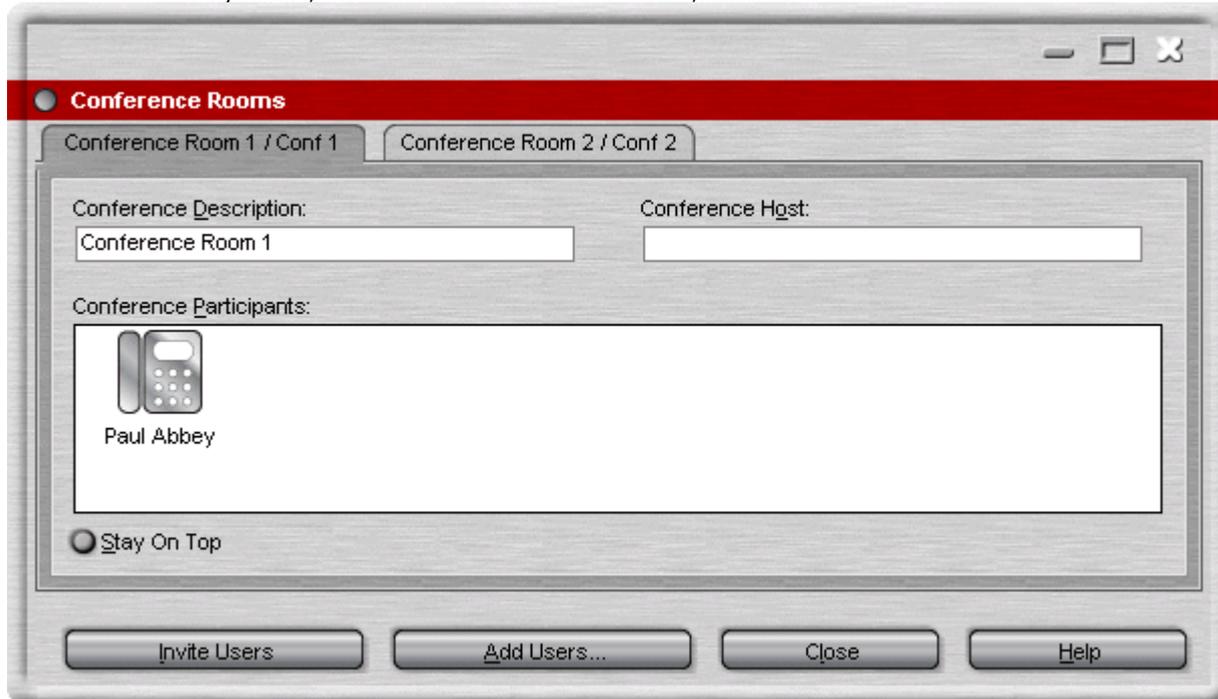
2. In the **Conference Description** area, type the subject of the conference. The subject only shows on the conference room form.

3. In the **Conference Host** area, type the name of the person who has requested the conference. The name is shown when viewing current system conferences in the directory panel. For more information, see .

4. Enter the users for the conference. Click the **Add Users** button and select the users from the directory list. If a user is added by mistake, right-click the user BLF and select **Remove**.

5. Invite the users to the conference.

   a. Using Voicemail Pro if present:
   Users can be invited by clicking the **Invite** button. The BLF icons show with a yellow outline. Each user is rung and invited to the conference. The voicemail server will invite users in batches of up to 5 depending on available connections. When the user answers, they are invited to join the conference. The Conference BLFs change automatically to indicate the user's response. The user responds by:

   - Press 1 to accept the invitation.

   - Press 2 to decline the invitation.

   - Press 3 to indicate that they are unavailable.

   b. Inviting Users Manually:
   Right-click on each user and select Call. If they accept, click either Add to conference room 1 or Add to conference room 2 from the Actions menu. If the user is unavailable or has declined the invitation, end the call, and right-click on the BLF to change the status accordingly to record the delegates response.

6. Once a conference is in progress additional users can be added using **Add to conference Room 1** or **Add to Conference Room 2** action. You can add users to a conference room by dragging and dropping a BLF in to the conference window. BLFs representing both internal and external numbers can be used.

To change the conference room view:

1. Right-click in the Conference Room Window.

2. Select **View** from the pop-up menu. The view types available are large icons, small icons, a list of icons or the details.

To change the way the icons are arranged:

- Right-click in the Conference Room Window.

- Select **Arrange** from the pop-up menu. The ways you can arrange the icons are by name, number or by status.

To change the status of a user:

1. Right-click on the user's BLF.

2. Select **Change Status**.

3. Select the status required. The status types are *Not invited*, *Invited*, *Joined*, *Declined*, or *Unavailable*.

2.11.2 Conferencing Held Calls

Using SoftConsole, multiple calls can be held and then a conference started between the held calls. This is the simplest method for starting a small ad-hoc conference of three or four parties. For more information about creating larger conferences, see <u>Using the Conference Rooms</u> 40.

To conference held calls:

1. Call and then place each user to be conferenced on hold.

2. Press the **CCC** **Conference** button.

3. Click **↳** **Hang Up** to remove yourself from the conference call.

2.11.3 Viewing Conferences

You can use the Directory Panel to view any current conferences on the telephone system. The conferences listed includes ad-hoc conferences started by other users and any SoftConsole conferences.

To view a conference:

* Click **Q** in the Directory panel. The conference name and host is listed for SoftConsole conferences. For other conferences, just the conference number is shown.

2.11.4 Adding Users to a Conference

The SoftConsole operator can add a caller to any conference.

To add a caller to conference:

1. Answer or make a call to a user.

2. Click **Q** in the Directory panel to display the current conferences.

3. Click the required conference.

4. Click **Actions > Add to Conference**.

Chapter 3.
Features

3. Features

Various call features are available from the Actions and Tools Menu. Features that are not explained in this section are covered in the Call Handling sections.

Features that are covered in this section are:

- **Annotate** 45
  Associate a text annotation with a call.

- **Dial Pad** 49
  Show the pop up Dial Pad form.

- **Door Release** 45
  Open controlled doors without leaving the desk.

- **Intrude** 45
  Talk to a user who is active on a call.

- **Page** 47
  Activate the paging feature.

- **Reattempt Transfer** 47
  Transfer a call that is returned to the operator.

- **Record Call** 48
  Turns on call recording.

- **Send Email** 48
  Send a message to a user through the email system.

- **Send a Text Message** 46
  Allows the operator to send a message to a user. The message is shown on the user's telephone display.

3.1 Adding Text to a Call

Text can be associated with a call. This feature is known as 'Tagging' or 'Annotating' a call. Alpha and Numeric characters can be used but not commas. By default, the length of a message is up to 16 characters. The SoftConsole administrator can specify the maximum length of call notes. for more information, see <u>Administrator Mode Overview</u> 54. When a call is transferred the text is displayed on the destination telephone if the equipment can show text and the call is internal. It is also recorded within the Call History area. For more information, see <u>Viewing the Call History</u> 15.

To Add text to a call:
1. Click **Actions > Annotate Call**. Alternatively, press **F11**.

2. Type the required details and click **OK**.
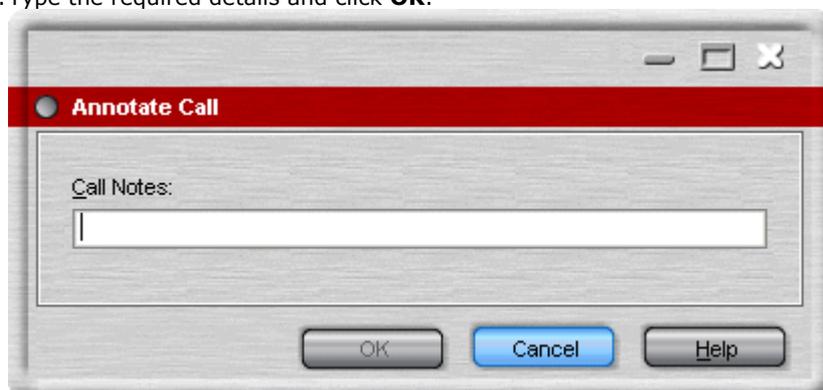
The Current Call Information panel contains a notes field that shows the entered text. When the call is transferred, the message is shown at the extension if the equipment can display text.

3.2 Door Release

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. The Door Release option is unavailable until you configure a door name. For more information, see <u>Configuring SoftConsole - Door Release Tab</u> 62.

Up to 2 doors can be controlled using SoftConsole. The doors are released for 5 seconds by default.

To open a door using SoftConsole:
1. Click **Tools > Door Release**.

2. Click the required door name to release the door.

3.3 Intrude

This is only available if you have permission to intrude and the other internal parties have given permission to allow intrude to happen. For more information on how to configure this option, see your system administrator.

To intrude on a user who is active on a call:
1. Locate the user in the directory panel.

2. Click **Actions > Intrude**. Alternatively, press **F9**.

3. Speak to the User. Both people on the call can hear you.

4. Click ↳ **Hang Up** to finish. Alternatively, click **Actions > Hang Up** or press the **End** button to end the call.

3.4 Sending a Text Message

You can send a short text message to a user with an Avaya display telephone. The **Send Message** feature is less disruptive then intruding on a call. The result of using **Send 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. The length of a message is set in the Keyboard Actions window. For more information, see Administrator Mode Overview 54.

To send a text message:

1. Locate the user in the directory.

2. Click **Action > Send Message**. Alternatively, press **Ctrl+M**. The extension number field is automatically completed from information showing in the directory.
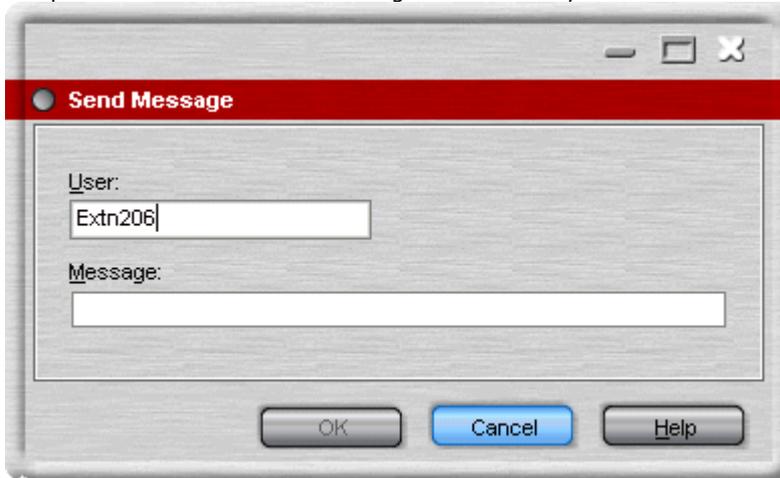
3. Enter the message and press **OK**.

When a message is sent to an Avaya DS Port display telephon,e 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 on a call the text is shown after the user completes the current call.

**To view a text message on telephones with a ⊞ MENU key:**

1. Press **MENU | MENU | Msgs | Recvs**.

2. A ▼ over **Recvs** indicates when there are text messages. Use the ◀ and ▶ keys to move through the text messages if there are several.

3. Press the display key under the number of messages to delete the current message.

4. When complete, press 🔲 **Exit**. If there are no text messages left the message lamp is extinguished unless the user also has voicemail messages. On other telephones, only the last message is shown. The message is cleared when the telephone is next used or receives a call.

3.5 Using Page

The SoftConsole operator can broadcast a message to a specific group of people. For example, an incoming caller needs to speak to someone urgently but they can not 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.

To broadcast a message:

1. Click ●))) **Page**. The Group Page window opens. Alternatively, click **Actions > Page** or press **F10**.
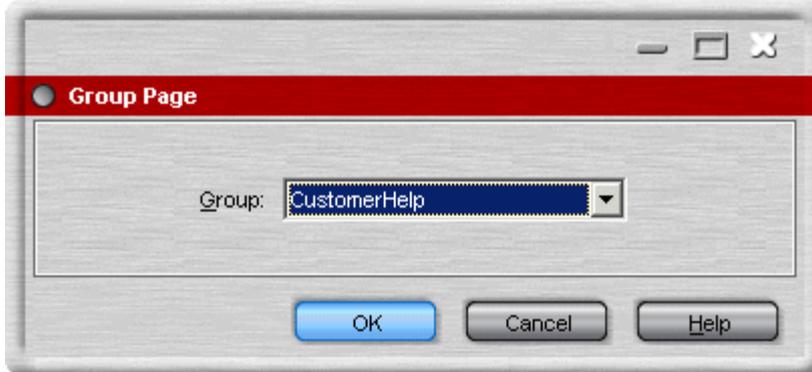
2. Select the group to broadcast to and click **OK**.

3. Speak the message.

4. Click ↳↓ **Hang Up** to end the page. Alternatively, click **Actions > Hang Up** or press the **End** button.

3.6 Re-Attempt Transfer

When a call is held against a busy extension 34 using **Ctrl+B**, when that extension becomes free the call is represented to the SoftConsole with a yellow border and indicating that the original target extension is now free. At this point you can either answer the call to do a normal supervised 34 or unsupervised transfer 34 or you can use **Ctrl+R** to do an immediate unsupervised transfer without answering the call.

3.7 Recording a Call

Current calls can be recorded, either a complete call or just part of the call. Recordings are paused when a call is put on hold or parked. When you connect to the call again the recording will resume. When Conference calls are being recorded, the recording continues when another caller is added to the conference. Recordings are only supported when Voicemail Pro is installed.

To record the current call conversation:

1. Click ● **Record Call**. Alternatively, click **Actions > Record Call** or press **F5**.

2. By default the conversation is recorded into the operators own voice mailbox.

To finish recording:

1. Click ● **Record Call**. Alternatively, click **Actions > Record Call** or press **F5**.

3.8 Send Email

The SoftConsole operator can send a message to a user through Microsoft Outlook.

To send an email message:

1. Click **Tools > Send Email**. The email message form opens. Alternatively, press **Ctrl+E**.

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

3.9 Using the Dial Pad

You can use the Dial Pad to dial a telephone number.

To make a call using Dial Pad:

1. Click **Tools > Dial Pad**. The Dial Pad window opens. Alternatively, 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. (Optional) Enter any notes for the call in the Call Notes area.

4. Click **Dial** to start the call.
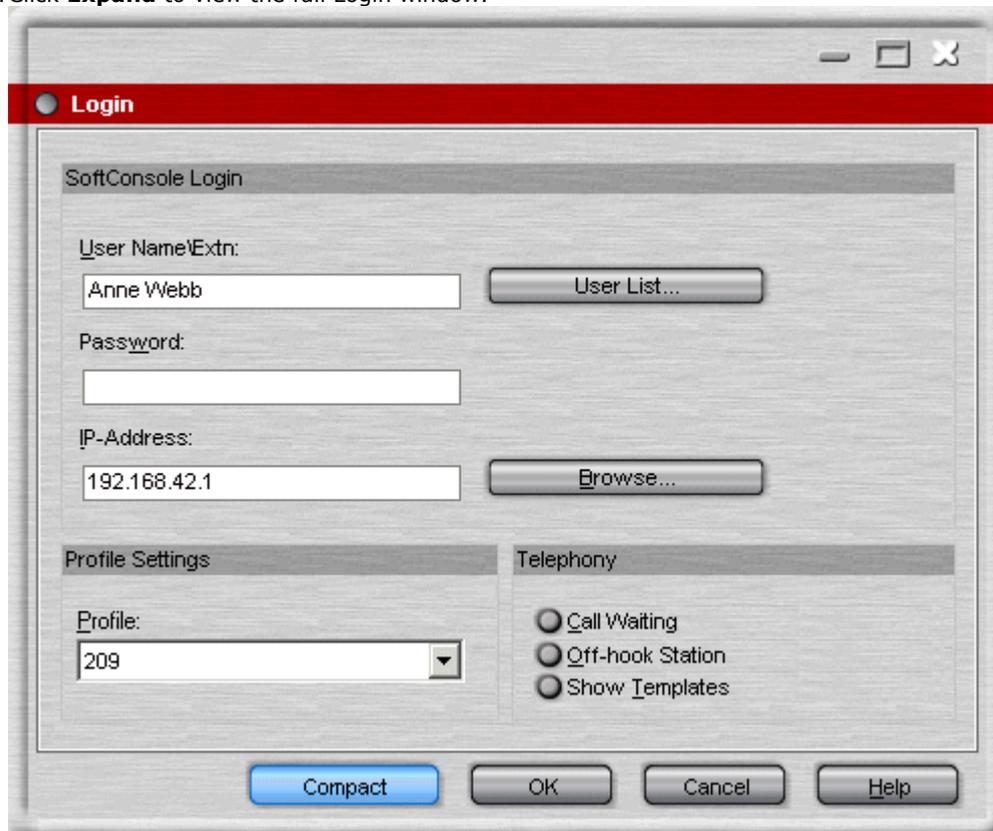
Chapter 4. Configuration

4. Configuration
4.1 The Login Window

Each user can have a profile containing their SoftConsole setup preferences. Some telephony options are available through the Login window.

To view the login window:
1. Click **Start > Programs > IP Office > SoftConsole**. The SoftConsole Login window opens.

2. Click **Expand** to view the full Login window.

To view the Login window from SoftConsole:
1. Click **File > Login**. You are asked if you want to save any changes to your profile.

2. Click either **Yes** or **No**. The compact Login window opens.

3. Click **Expand** to view the full login window. The telephony options available through the full Login window are:

- **Profile**
  Each user can have a profile, containing their SoftConsole setup preferences. The list contains the available profiles. The chosen profile is the default profile the next time SoftConsole is started. The User Name and Password need to be re-entered if the profile is changed.

- **Call Waiting**
  Call Waiting provides a call waiting tone when you are on a call and another call is presented. When the existing call is dropped, the new call is immediately presented to you. This option is ignored if you have multiple call appearances set on your telephone.

- **Off-hook Station**
  If selected the Off-hook Station feature is turned on for the current session. This feature is usually used by operators that use the hands free features of the telephone. SoftConsole controls the operation of the telephone. Only clear this option if you have an analog telephone where you answer or end calls using the handset.

- **Show Templates**
  Indicates whether templates are included in the Profile list. To view both Templates and Profiles in the listing select this option. The list includes predefined templates. For more information, see Default Templates 74 .

4.2 Saving your Profile

You can change the appearance of some areas of the SoftConsole screen. For example, the size of the panels can be changed. The changes can be saved to your profile so that the next time you login to SoftConsole the changes you made are still active.

If you require the Held and BLF panels to be hidden or shown, you need to be logged in to SoftConsole with Administrator rights. For more information, see [Administrator Mode](#) 54ᐟ.

SoftConsole can be configured to automatically save any changes made. For more information, see [Configuring SoftConsole - SoftConsole Tab](#) 71ᐟ.

To save your current profile:

1. Click File > Save Profile.

To save your profile with a new name:

1. Click **File > Save Profile As**. The Save Profile as window opens.

2. Enter a new file name.

3. Click **OK**. The profile is saved. The status bar will show the new profile name.

4.3 Administrator Mode

SoftConsole can be started in Administrator mode. When run in this mode, there is no access to the telephony functions. In administrative mode you can:

- Create and edit user profiles.
- Amend the length of the call notes. For more information, see [Keyboard Actions Tab](#) 65.
- Create and edit templates.
- Remove or display the BLF, Held Calls and Park Slots panels.

To start SoftConsole in Administrator Mode:

1. At the Login screen enter:
   - **User name:** *Administrator*
   - **Password:** *password* (This is the default Administrator password).

2. SoftConsole starts in Administrator Mode. The status bar indicates that you are in Administrator mode and not connected to the telephone system.

To change the Administrator Password:

1. Start SoftConsole in Administrator mode.

2. Click **File >Change Administrator Password**. The **Change Administrator Password** screen opens.

3. Enter the old password. The password shows as asterisks.

4. Enter the new password. Make a note of the new password being careful regarding capitalization as the password is case sensitive. The new password shows as asterisks.

5. Enter the new password again to confirm.

6. Click **OK**.

4.3.1 Editing a Profile

You can only edit a user's profile if you are in Administrative Mode.

To change a users profile:

1. At the SoftConsole login screen, select the profile you want to edit.

2. Login as Administrator.

3. Make changes as required

4. Click **File > Save Profile** to save the profile.

4.3.2 Using Templates

You can use templates to create a user's profile. There are three templates supplied with SoftConsole. For more information, see <u>Default Templates</u> 74 in the Appendix. Templates can only be created and edited if you are logged in to SoftConsole in administrative mode.

To create a new template:

1. Log in to SoftConsole as an administrator. Make sure that you have loaded a template to base your new template on.

2. When you log in, click **Expand**. Select a profile called AdminTemplate1, AdminTemplate2 or AdminTemplate3.

3. Change the layout as required. The areas that can be changed are:

   - The display size of the panels.

   - The number of park slots.

   - The panels that are visible.

4. Click **File > Save Template** to save the new template

5. Enter a name for the template and click **OK**.

4.4 Configuring SoftConsole

You can configure your SoftConsole settings.

**To view the configuration tabs:**

1. Click ✎ **Preferences - Configure**. You can also click **Tools > Preferences - Configure**.

2. Select the required option. The options that can be changed are grouped into 11 tabs. The tabs are:

- **Appearance**
  Change the general appearance of the SoftConsole. For example, the font, the colors used to indicate call status and the whole skin of the application. For more information, see Appearance Tab 57.

- **BLF Groups**
  BLF Groups can be created, edited and deleted. The order that the groups are shown can also be rearranged. For more information, see BLF Groups Tab 58.

- **Conferencing**
  Enter the names of the Conference rooms. For more information, see Conferencing Tab 60.

- **Directories**
  Specify what directory information can be included in the directory display and what information can be included in the properties of individual entries. For more information, see Directories Tab 61.

- **Door Release**
  Enter a door name for the option to become active. For more information, see Door Release Tab 62.

- **Incoming Calls**
  You can provide a name match against an incoming calls. A specific script or media file can be played on calls from a matching number. For more information, see Incoming Calls Tab 63.

- **Keyboard Actions**
  You can specify what happens in SoftConsole when you start pressing alphabetic or numeric keyboard characters. For more information, see Keyboard Actions Tab 65.

- **Keyboard Mapping**
  You can see and if required change the keyboard short cuts used by the SoftConsole. For more information, see Keyboard Mapping Tab 66.

- **Park Slots**
  Specify the park slot buttons that are available and what park slot IDs are associated with those buttons. For more information, see Park Slots Tab 67.

- **Queue Mode**
  Configure and monitor up to eight queues. For more information, see Queue Mode Tab 69.

- **SoftConsole**
  Configure how SoftConsole saves any changes that you make to the screen layout and behaviour when minimised or closed. For more information, see SoftConsole Tab 71.

4.4.1 Appearance Tab

From the Appearance tab, you can change the general appearance of the SoftConsole. For example, you can change the font used, the colors used to indicate call status and the whole skin of the application. For more information about skins, see the Applications Installation and Administration manual.

To view the appearance of SoftConsole:

1. Click ✎ **Preferences - Configure > Appearance**. Alternatively, click **Tools > Preferences-Configure > Appearance**.
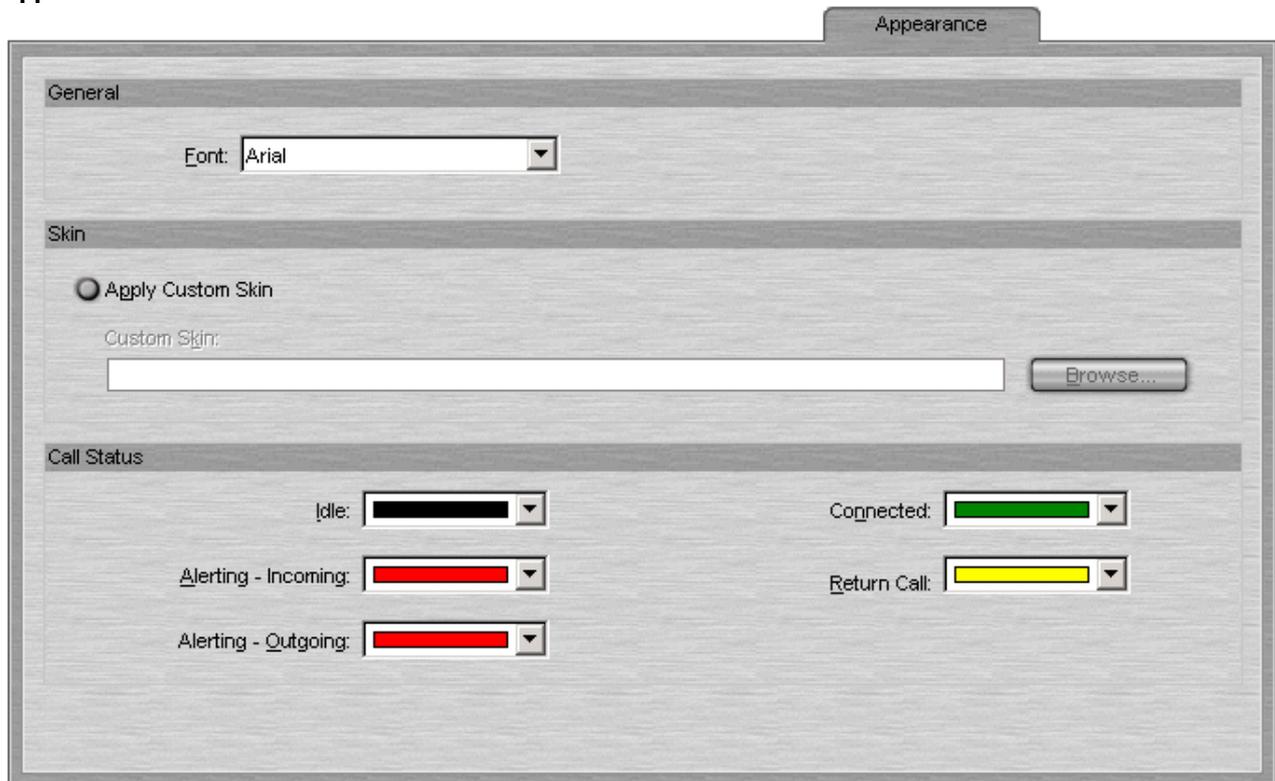
2. Change the settings as required.

   - **Font**
     Use the drop-down list to select the font required.

   - **Apply Custom Skin**
     Check this option to select and use a custom skin. A skin is a set of files defining the whole appearance of the SoftConsole. By default, no additional skins are supplied with SoftConsole.

   - **Custom Skin**
     If Apply Custom Skin is selected, you can browse to the location of the skin definition file.

   - **Call Status**
     You can set the colors that are used for the border of the Call Details panel. Different colors can be set for:

     - Idle.

     - Alerting - Incoming.

     - Alerting - Outgoing.

     - Connected.

     - Return Call.

4.4.2 BLF Groups Tab

Busy Lamp Field (BLF) icons provide user status and speed dials at a glance. You can also add icons for other numbers though they only act as speed dials. By grouping the BLF icons, you can have them shown on different named tabs.

To view the BLF Groups configuration tab:

1. Click ✎ **Preferences - Configure > BLF Groups**. Alternatively, click **Tools > Preferences-Configure > BLF Groups**.
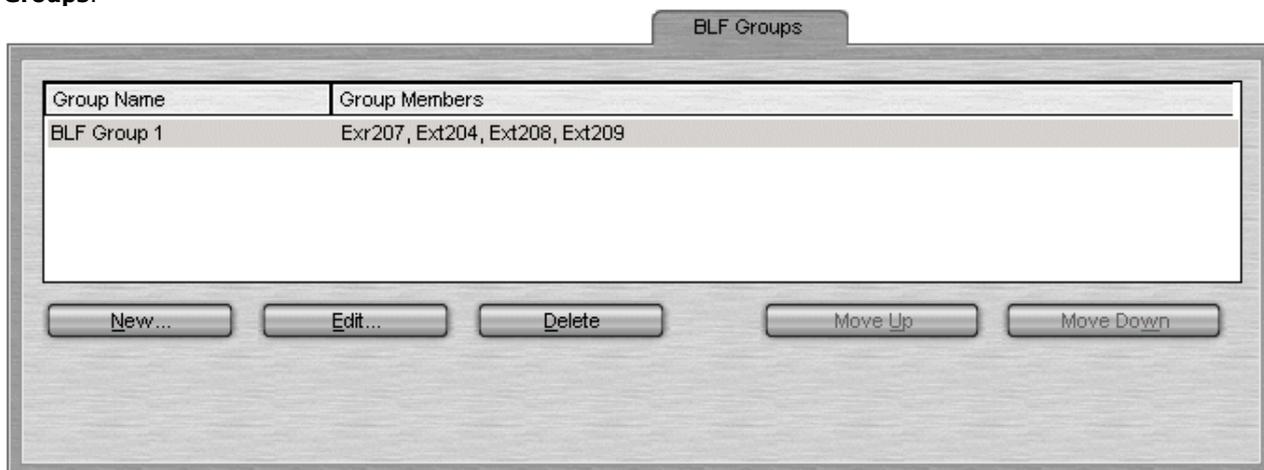
2. The menu displays the name of each group and the names of its members. You can use the control buttons to adjust the BLF groups.

- **New**
  Create a new group. For more information, see Configuring BLF Groups 59ᐟ.

- **Edit**
  Edit the current select group. For more information, see Configuring BLF Groups 59ᐟ.

- **Delete**
  Deletes the current selected group.

- **Move Up/Move Down**
  The BLF tab sheets in the BLF Panel are presented in the same order that the BLF Groups appear in the list. To reorder the BLF Groups, select a BLF Group and click Move Up or Move Down. The group's position is moved up or down one position in the list.

4.4.2.1 Configuring BLF Groups

You can group BLF icons so that similar icons are grouped together. For example, the regular extension numbers that you use for the sales team are grouped together.

To create a new BLF Group:

1. Click ✎ **Preferences - Configure > BLF Groups > New**. Alternatively, click **Tools > Preferences-Configure > BLF Groups > New**.
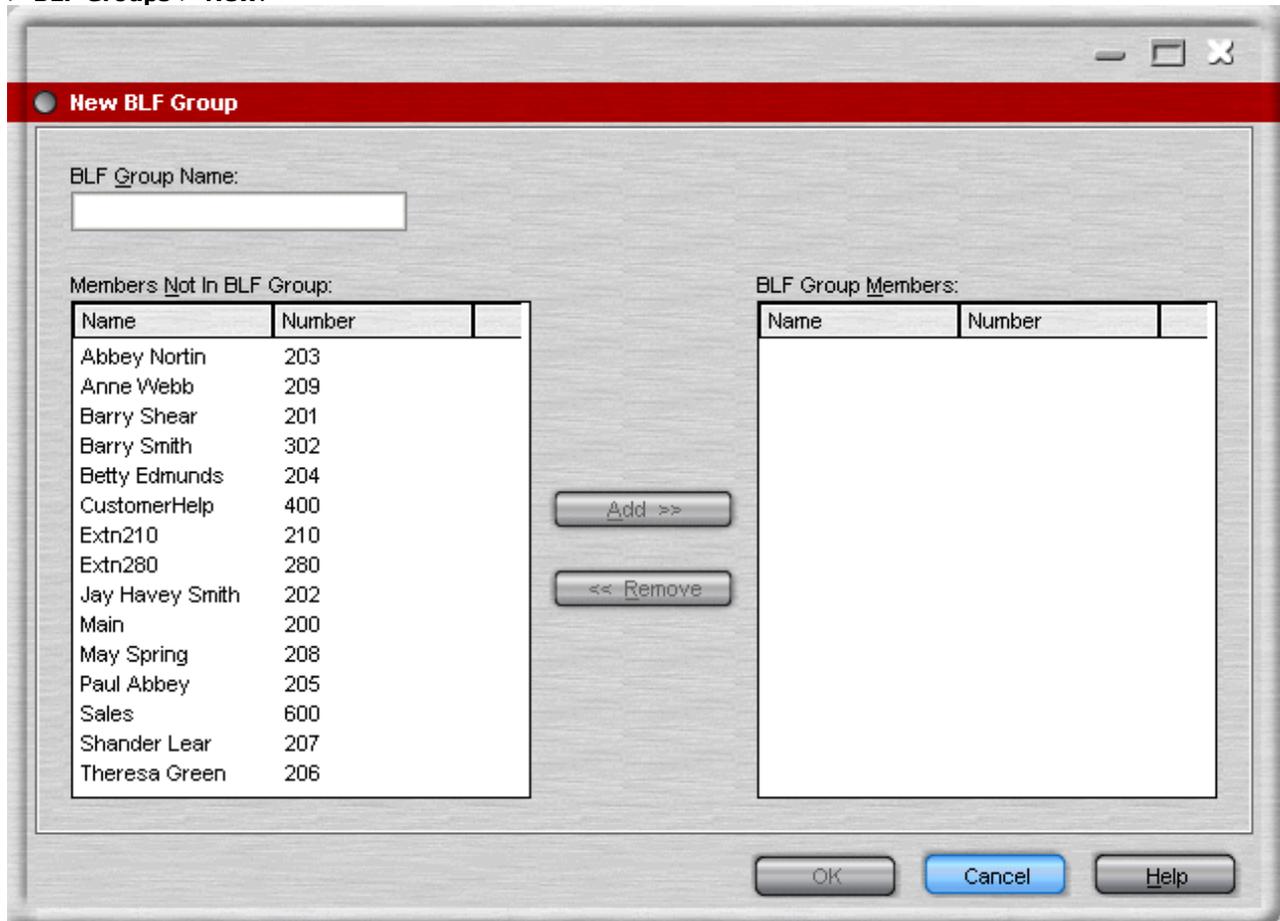
2. Enter a unique **BLF Group Name**.

3. Select the required member from the 'Members not in BLF Group' list, and then click **Add**.

4. The details show in the 'BLF Group Members' list on the right side of the dialog box. To add more than one member at a time, hold down the Ctrl key and click each member. When all members are selected, click the **Add** button.

5. Click **OK** when all members for a group are added. You are returned to the BLF Groups configuration form. The new BLF Group is added to the end of the list.

To open New BLF Group window from the main screen:

1. Right-click in a blank area of the BLF Panel to display a pop-up menu.

2. Click **New > BLF Group**. The New BLF Group window opens.
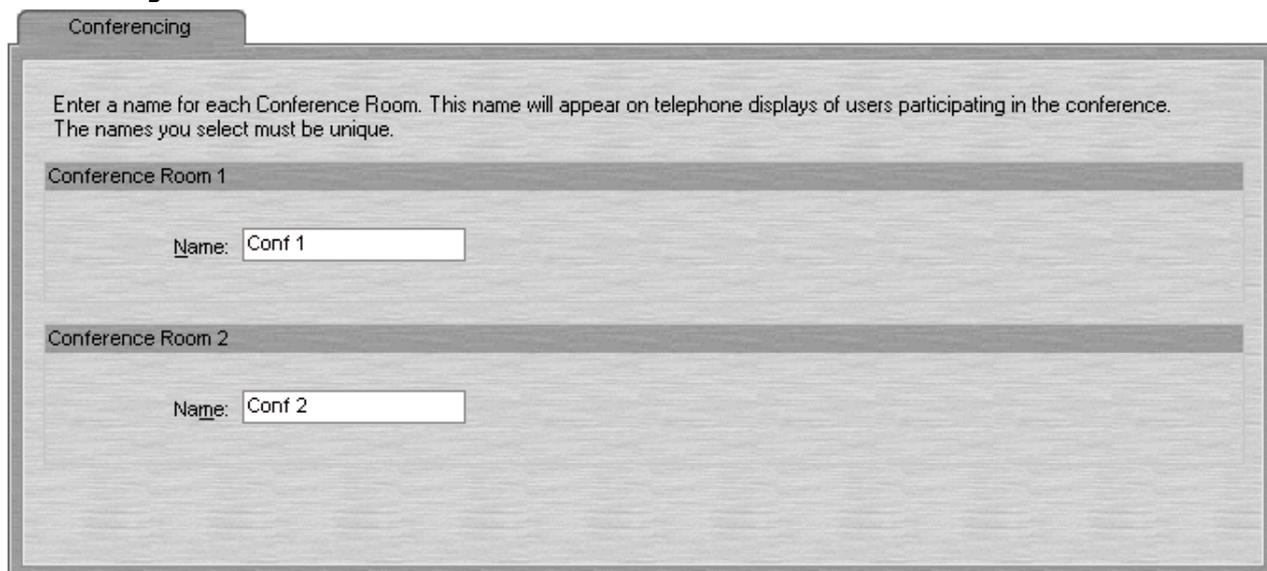
To edit a BLF Group:

1. Click ✎ **Preferences - Configure > BLF Groups**. Alternatively, click **Tools > Preferences-Configure > BLF Groups**.

2. Select the BLF group you want to change.

3. Click **Edit**.

4. Add or remove group members.

5. Click **OK** to save the changes.

4.4.3 Conferencing Tab

You can name the two conference rooms supported by the SoftConsole. The names appear on the telephone displays of internal users in the conference room. If the conference rooms are not named, they are unavailable.

To view the Conferencing configuration tab:

1. Click 🔧 **Preferences - Configure > Conferencing**. Alternatively, click **Tools > Preferences-Configure > Conferencing**.

2. For each conference room, enter the name required. The names can contain up to 10 characters and must be unique.

4.4.4 Directories Tab

You can specify the directory information that is included in the directory display. You can also specify the information that is included in the properties of individual entries.

- Note: User, hunt group and directory entries shown within SoftConsole are only updated when the SoftConsole is started. If changes are made to the telephone system directory, the SoftConsole should be restarted.

To view the Directories configuration tab:

1. Click ✎ **Preferences - Configure > Directories**. Alternatively click **Tools > Preferences-Configure > Directories**.

2. **Directory Access Section**
   When 🗗 is pressed in the directory, it shows directory numbers other than users and groups. The Directory Access options specify from where those other directory numbers are obtained.

   - **SoftConsole Local Directory**
     These are directory numbers and associated names stored by the SoftConsole. For more information, see .

   - **System Directory**
     These are directory numbers and associated names stored on the telephone system and shared by all users.

   - **Microsoft Outlook Contacts Folder**
     This options allows address book entries from Outlook running on the same PC to be included in the directory.

3. **Display Fields for Search Results Section**
   When a directory search matches an individual directory entry, the directory panel display a range of information about entry. The Display Fields for Search Results options specify which information fields are shown.

4.4.5 Door Release Tab

The Door names must be entered before you can use SoftConsole to control a door. When the names have been entered you can control the door using SoftConsole.

To enter the door names:

1. Click ✎ **Preferences > Door Release**. The Door Release window opens. The **Entry Code** field contains the number of the door relay to activate, either 1 or 2. The entry codes can not be changed.
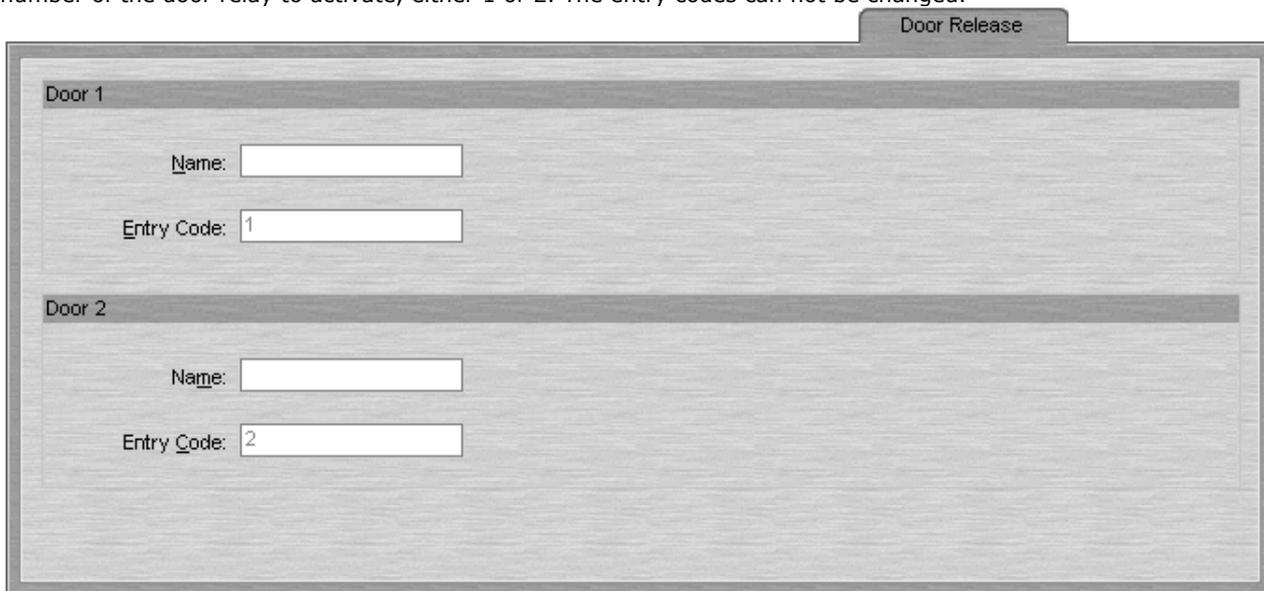
2. In the **Door Name** field, type the name that you want to use for the door. For example, the door to the Loading Bay might be named 'Loading Bay'.

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

4. You can now open a door by selecting **Door Release** in the Tools menu. You then select the door name from the menu.

4.4.6 Incoming Calls Tab

You can setup directory names and numbers. These can then be shown in the SoftConsole directory panel along with users, hunt groups and system directory numbers.

The directory numbers can be used to make outgoing calls. They can also be used to provide a name match against the calling number on incoming calls. You can also associate a specific script and media file to be played on calls from a matching number.

To view the Incoming Calls configuration tab:

1. Click ✎ **Preferences - Configure > Incoming Calls**. Alternatively, click **Tools > Preferences-Configure > Incoming Calls**.
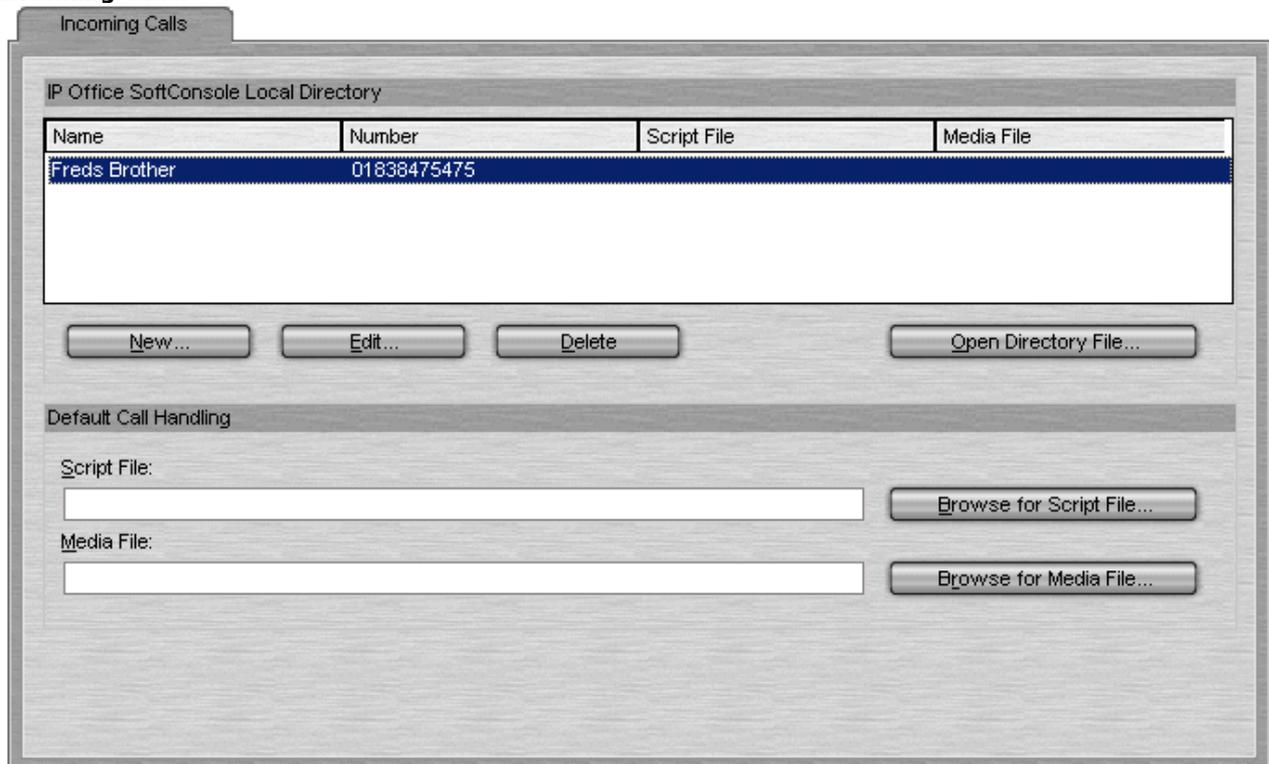

2. The current SoftConsole directory entries are listed. Select the action to perform using the available buttons:

- **New**
  Add a new directory entry. For more information, see Configuring Directory Lists 64.

- **Edit**
  Edit the selected entry. For more information, see Configuring Directory Lists 64.

- **Delete**
  Delete the selected entry.

- **Open Directory File**
  Change the file being used for storing the SoftConsole directory entries. The entries in the selected file are then listed and used.

- **Script File**
  A script can be associated with an incoming calling number. The script gives the operator information relevant to the calling number. For example, the company name and specific instructions. When an operator handles calls for more than one company, the ability to answer incoming calls with the correct company name is essential. The use of a script helps the operator to do this. A script is text saved as a .TXT or .RTF file. It is shown when a call is presented to the operator with the number entered in the Number field. Use the Browse button to find and select a script file on your PC or network.

- **Media File**
  The name of the .WAV files to be played when a call is presented to the operator. Use the Browse button to find and select a .WAV file on your PC or network.

4.4.6.1 Configuring Directory Lists

From the Incoming Calls tab 63, you can create new entries and edit the properties of existing entries.
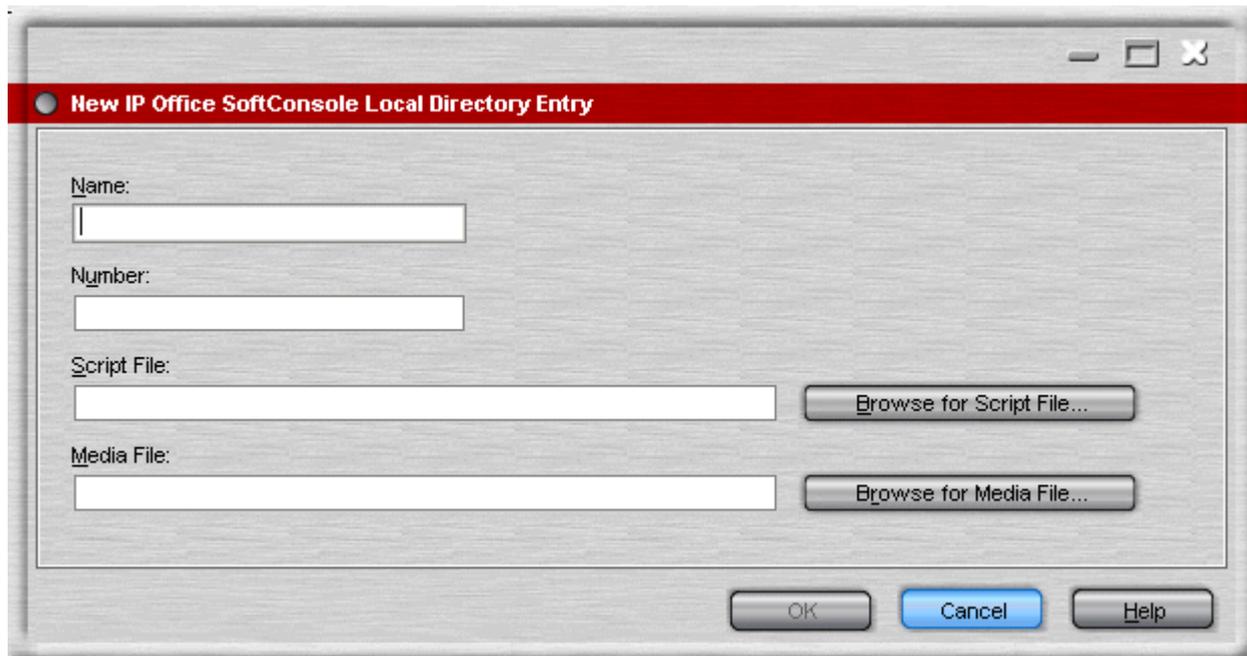

The properties are:

- **Name**
  The Name that you want to be associated with the Directory Entry.

- **Number**
  The telephone number that is dialed when the Directory entry is selected.

- **Script File**
  A script can be associated with an incoming calling number. The script gives the operator information relevant to the calling number. For example, the company name and specific instructions could be shown. When an operator handles calls for more than one company, the ability to answer incoming calls with the correct company name is essential. The use of a script helps the operator to do this.

  - A script is text saved as a .TXT or .RTF file. It is shown when a call is presented with the number entered in the Number field. Use the Browse button to find and select a script file on your PC or network.

- **Media File**
  The name of the .WAV files to be played when a call is presented. Use the Browse button to find and select a .WAV file on your PC or network.

4.4.7 Keyboard Actions Tab

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

To view the Keyboard Actions configuration tab:

1. Click ✎ **Preferences - Configure > Keyboard Actions**. Alternatively, click **Tools > Preferences-Configure > Keyboard Actions**.
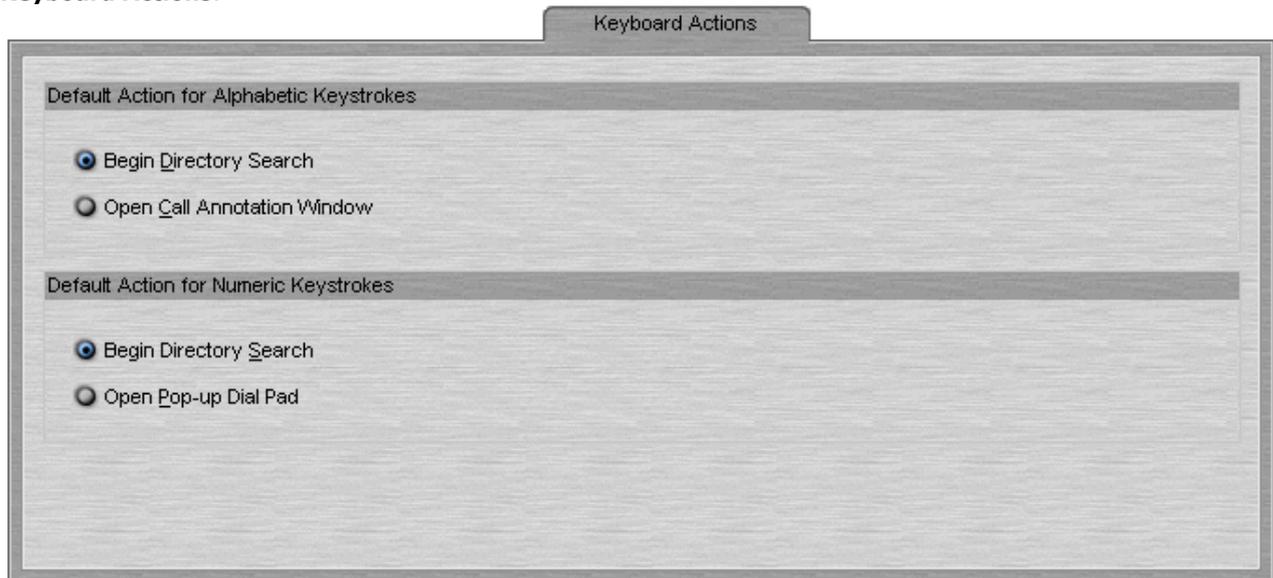
2. Select the required default action for alphabetic keystrokes. The options are:

   - **Begin Directory Search**. This is the default setting.

   - **Open Call Annotation Window**.

3. Select the required default action for numeric keystrokes. The options are:

   - **Begin Directory Search**. This is the default setting.

   - **Open Pop-up Dial Pad**.

Maximum Length for Call Notes

The Maximum Length for Call Notes field is only visible when running SoftConsole in administrator mode. For more information, see Administrator Mode 54.

The length specified also applies to text messages sent with **Send Message**. The default is 16 characters. If this value is increased, the note might not be fully shown on all telephones and applications.

4.4.8 Keyboard Mapping Tab

You can see and if required change the keyboard short cuts used by the SoftConsole.

To view the Keyboard Mapping configuration tab:

1. Click ✎ **Preferences - Configure > Keyboard Mapping**. Alternatively, click **Tools > Preferences-Configure > Keyboard Mapping**.
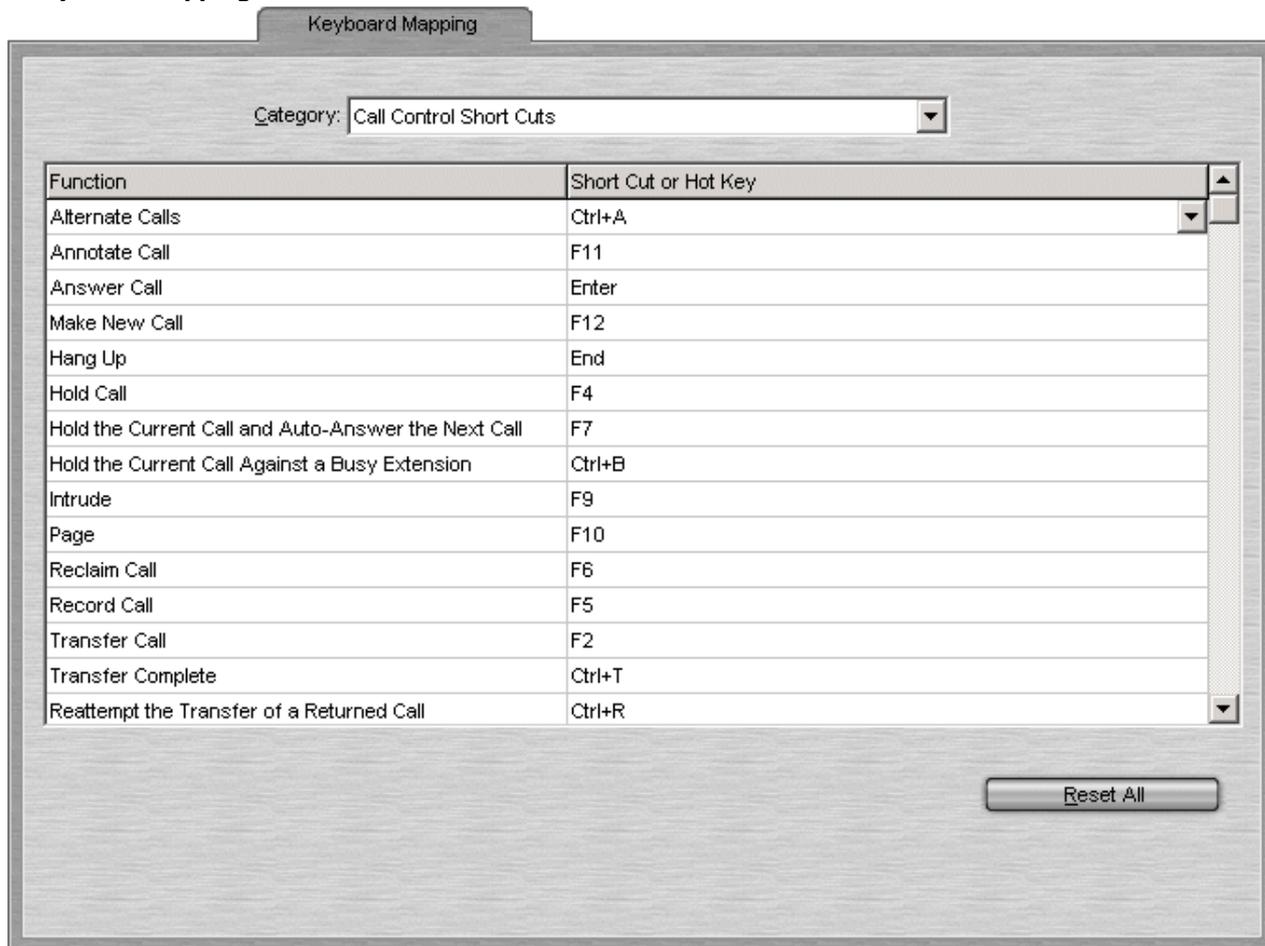

2. You can use the **Category** drop-down to select which sets of short cuts are shown.

3. To change a short cut:

   a. Click the current short cut key.

   b. Use the drop-down control that opens to select the required new short cut. If the new short cut is already in use, a warning is shown.

4. You can reset all the short cuts back to their defaults by clicking **Reset All**. For more information on the default setting, see Short Cut Keys 76 in the Appendix.

4.4.9 Park Slots Tab

You can set how many park slot buttons are available and what park slot IDs are associated with those buttons.

**To view the Park Slots configuration tab:**

1. Click ✎ **Preferences - Configure > Park Slots**. Alternatively, click **Tools > Preferences-Configure > Park Slots**.
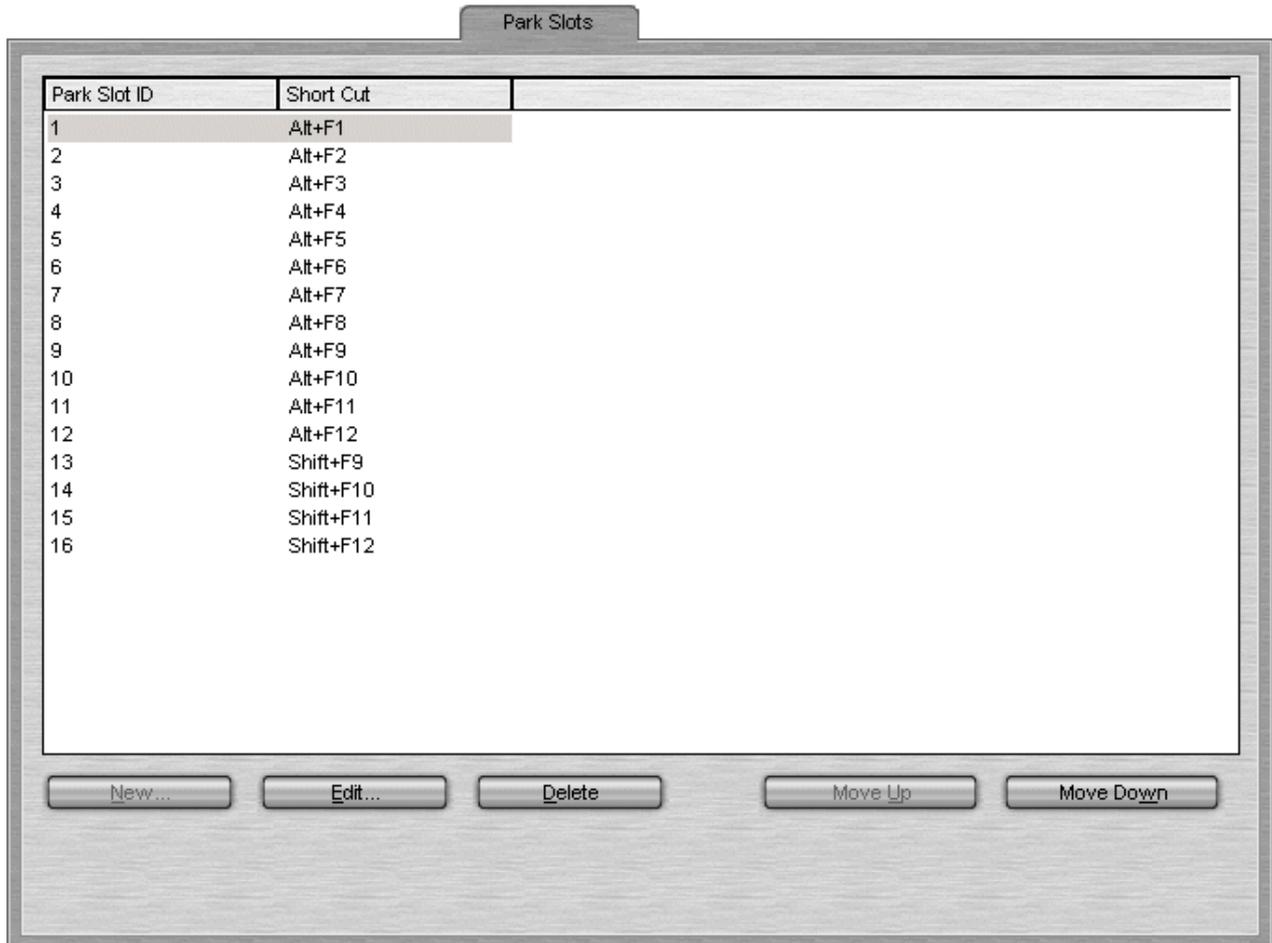
- **New**
  Allows a new button to be added up to a maximum of 16 buttons. For more information, see the section Configuring Park Slots 68ᐧ.

- **Edit**
  Allows you to change the park slot ID of the current selected button. For more information, see the section Configuring Park Slots 68ᐧ.

- **Delete**
  Remove the selected park slot from the list.

- **Move Up / Move Down**
  The order of the configured park slots can be changed by moving the selected park slot up or down.

4.4.9.1 Configuring Park Slots

From the Park Slots tab 67 you can create new entries and edit the properties of existing entries.
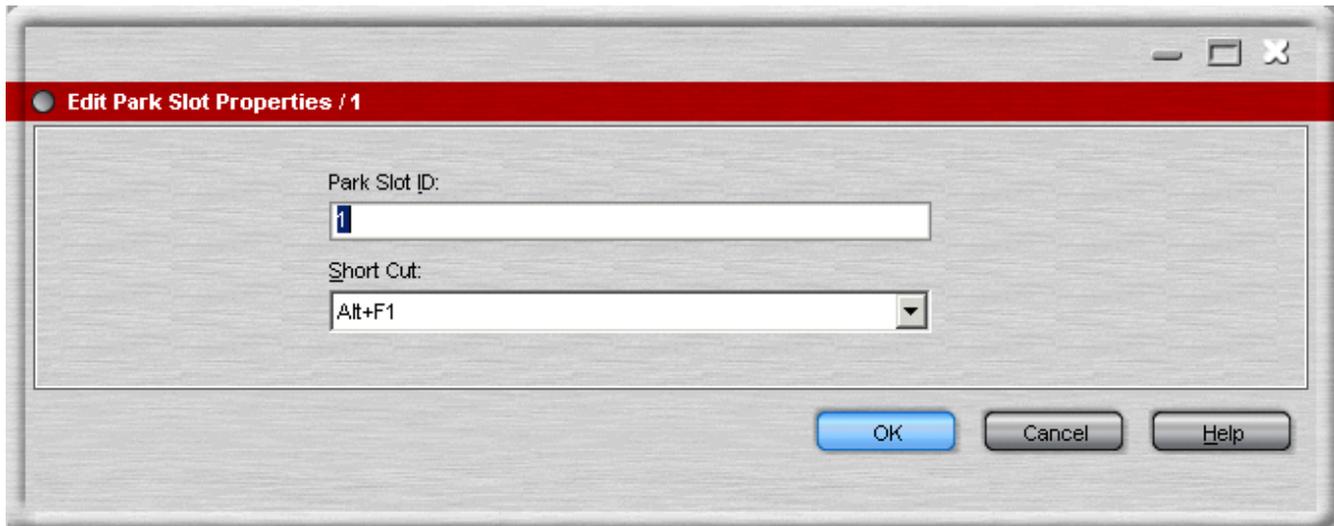
- **Park Slot ID**
  Each ID can be alphanumeric, containing both numbers and letters. The ID should not include spaces.

- **Short Cut**
  A keyboard short cut that enables the operator to park or unpark a call into a specific Park Slot.
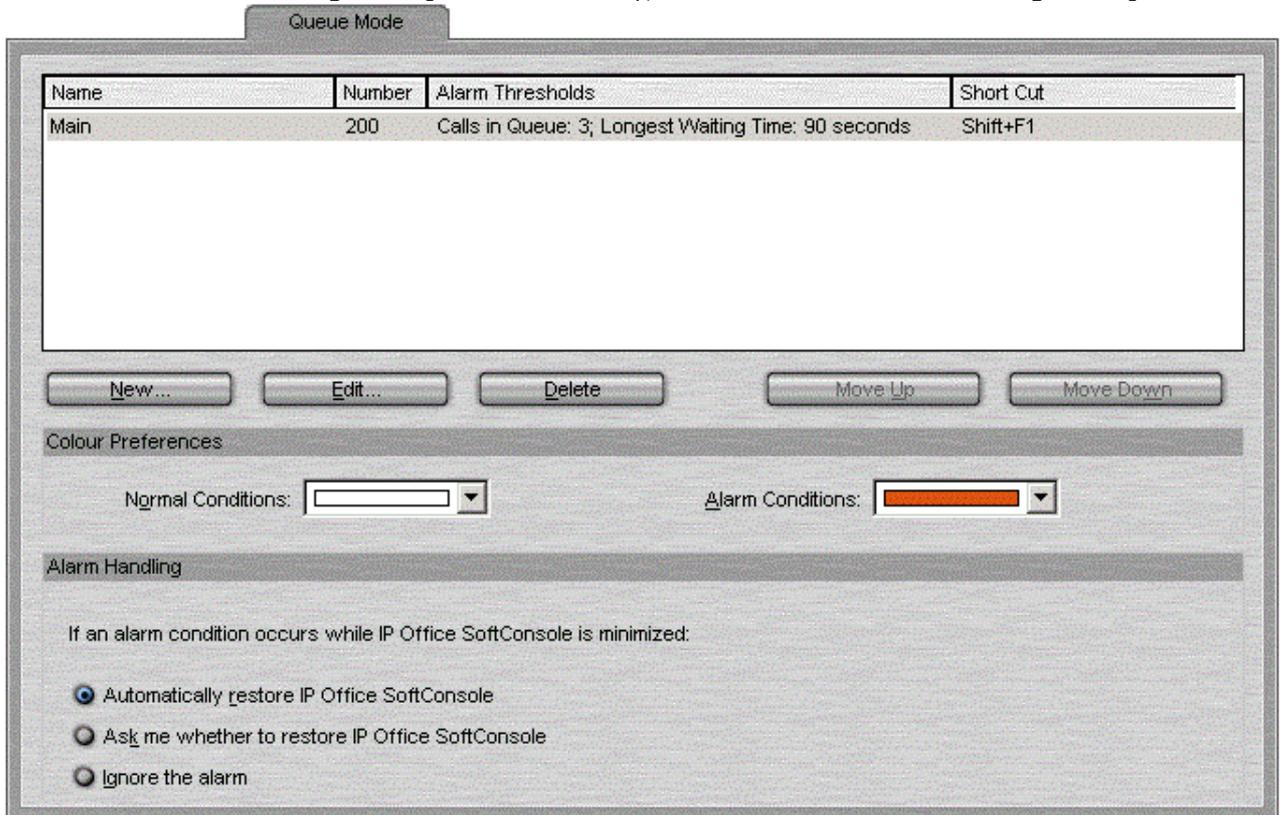
4.4.10 Queue Mode Tab

A queue monitor can be configured for a specific hunt group. The hunt group needs to be created on the telephone system with queuing enabled.

- The SoftConsole can only monitor hunt group queues on the same system as the SoftConsole user, it cannot monitor hunt group queues on other telephone systems in a network.

You can configure and monitor up to eight queues. One of the queues is configured as a recall queue.

To view the queue configuration tab:

1. Click ✎ **Preferences - Configure > Queue**. Alternatively, click **Tools > Preferences-Configure > Queue**.

Queue Mode			
Name	Number	Alarm Thresholds	Short Cut
Main	200	Calls in Queue: 3; Longest Waiting Time: 90 seconds	Shift+F1

    [New...] [Edit...] [Delete]   [Move Up] [Move Down]

    Colour Preferences

    Normal Conditions: [▼]   Alarm Conditions: [████████▼]

    Alarm Handling

    If an alarm condition occurs while IP Office SoftConsole is minimized:

    ● Automatically restore IP Office SoftConsole
    ○ Ask me whether to restore IP Office SoftConsole
    ○ Ignore the alarm

2. Details of queues the are being monitored are shown. For each queue, the alarm thresholds are shown. The alarm thresholds are the number of calls and longest waiting call.

    - The **Recall Queue** shows calls that were queued, answered and then transferred, but the call was not answered. Instead of the call being returned to the end of the original queue the call is placed into a new queue called Recall.

3. Queues can be edited using the buttons:

    - **New**
      Add a new queue to monitor. For more information, see Configuring Queues 70 .

    - **Edit**
      Change the current selected queues settings. For more information, see Configuring Queues 70 .

    - **Delete**
      Delete the current selected queue.

    - **Move Up/Move Down**
      Adjust the order of display of the queues.

4. **Color Preferences**
    You can adjust the Normal Conditions color and the Alarm Conditions color used for the queues.

5. **Alarm Handling**
    You can set what happens when a queue goes over its alarm threshold. The options are:

    - **Automatically restore SoftConsole**

    - **Ask me whether to restore SoftConsole**

    - **Ignore the alarm**

4.4.10.1 Configuring Queues

When you select Edit or Create from the Queue Mode tab [69] the Queue Properties screen opens. If you have selected an existing queue, the details of the queue are entered in the form.

The fields show the queue details. Details that are amended are applied to the selected queue.

- **Queue Name**
  A list of available queues. Select the queue required.

  - The SoftConsole can only monitor hunt group queues on the same system as the SoftConsole user, it cannot monitor hunt group queues on other telephone systems in a network.

- **Shortcut**
  Select the shortcut key combination required for the new queue.

- **Alarm Settings**

  - **Number of Calls in Queue**
    This option can be turned on or off. This alarm occurs when the number of calls within a queue reaches the number specified in the calls box.

  - **Calls**
    The number of calls within a queue before an alarm occurs.

  - **Longest Waiting Time**
    This option can be turned on or off. If on an alarm occurs when the call wait time reaches the time specified in the seconds box.

  - **Seconds**
    The number of seconds a call waits within the queue before an alarm occurs.

  - **Play Media File**
    When an alarm state is reached a specific sound can occur as an alarm. If a media file is to be associated with an alarm, click **Browse for Media File** and locate the file.

4.4.11 SoftConsole Tab

You can set how SoftConsole saves any changes that you make to the screen layout and behavior when minimized or closed.

To view the SoftConsole configuration tab:

1. Click ✎ **Preferences - Configure > Soft Console**. Alternatively, click **Tools > Preferences-Configure > Soft Console**.
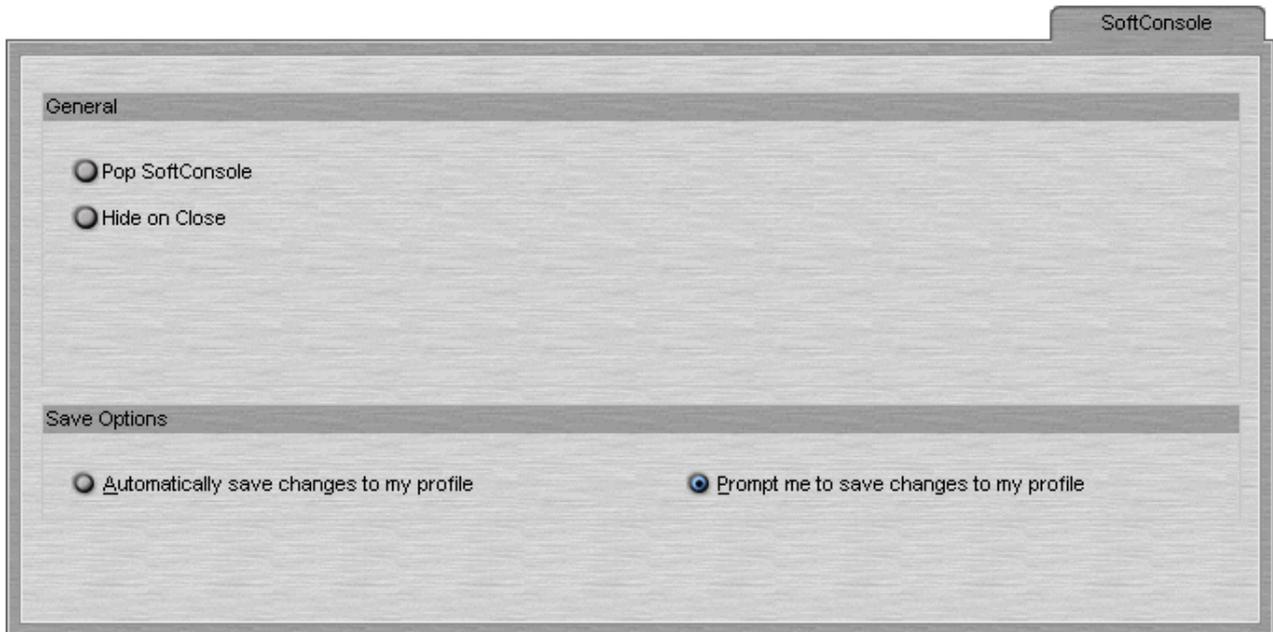
2. Select the general options required:

   - **Pop SoftConsole**
     When an incoming call is received SoftConsole 'Pops' to the front of any other applications that are running.

   - **Hide on Close**
     This option minimizes SoftConsole to the System Tray on the Windows Taskbar when you close the application rather than exiting.

3. Select the save mode required:

   - **Automatically Save Changes to My Profile**
     In this mode, when you close SoftConsole any profile changes are automatically saved.

   - **Prompt me to Save Changes to My Profile**
     In this mode, when you close SoftConsole a dialog box opens. You can then select whether to save or abandon any changes.

Chapter 5.
Appendix

5. Appendix

5.1 Default Templates

When the SoftConsole application is installed, the following templates are provided.

AdminTemplate1

Panels showing: Call Details, Directory Panel, Queue Panel, Held Calls Panel, BLF Panel and Park Slot panel (containing 16 slots).
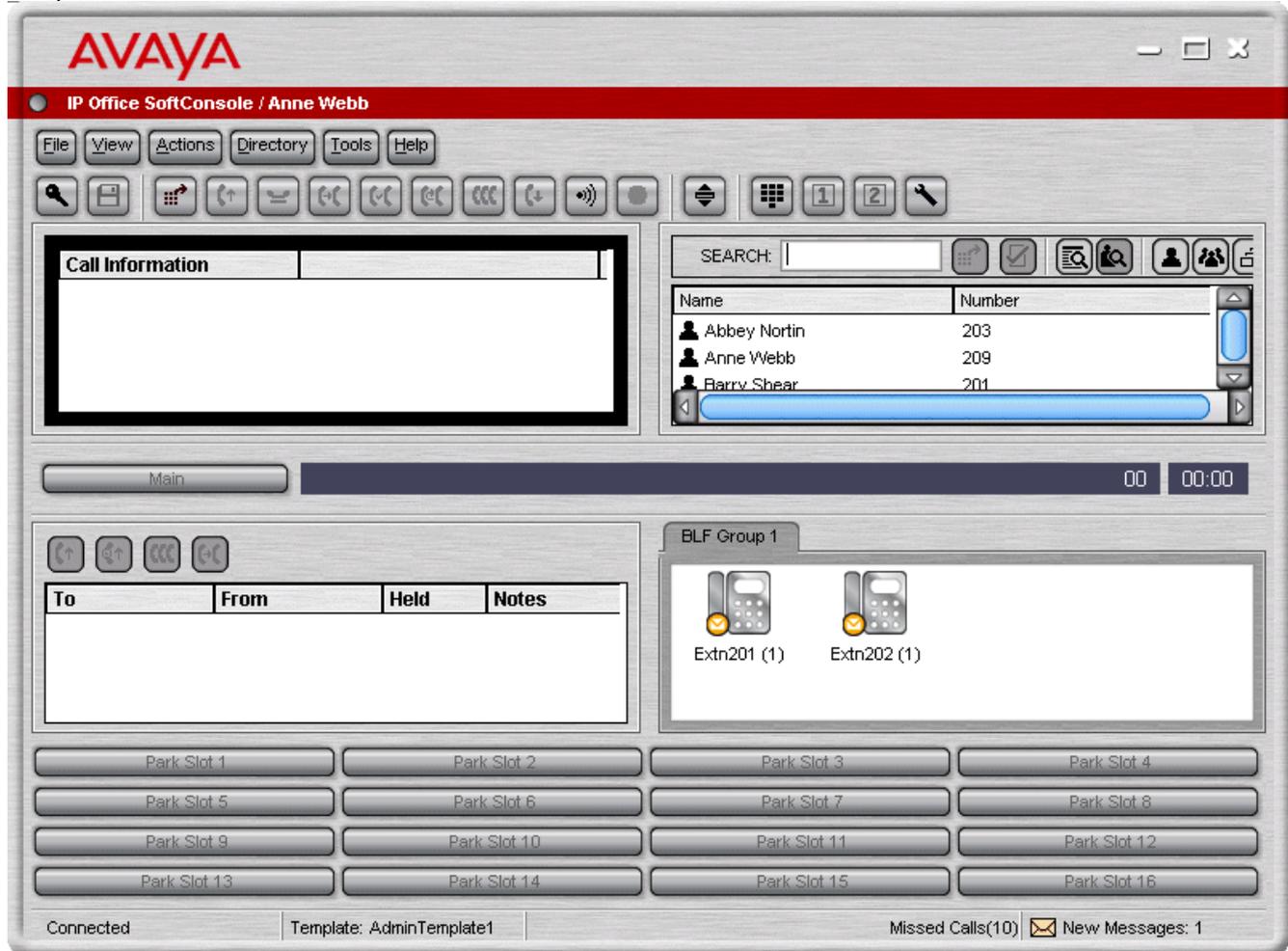
AdminTemplate2

Panels showing Call Details, Directory Panel, Queue Panel, Held Calls Panel, and Park Slot panel (containing 16 slots). The BLF Panel is hidden.

AdminTemplate3

Panels showing the Call Details, Directory Panel, and Queue Panel. If a profile is created using Admin Template 3 the user cannot see the Call History. For more information, see Call History 15 in the Main Window section.

5.2 Short Cut Keys

The sections below show the default short cut keys used by SoftConsole. These can all be adjusted through the **Tools > Preferences-Configure** > **Keyboard Mapping** menu.

Call Control Short Cuts

- Alternate calls: Ctrl + A
- Annotate call: F11
- Answer call: Enter
- Make new call: F12
- Hangup: End
- Hold call: F4
- Hold the current call and auto answer next: F7
- Hold the current call against a busy extension: Ctrl + B
- Intrude: F9
- Page: F10
- Reclaim call: F6
- Record call: F5
- Transfer call: F2
- Transfer complete: Ctrl + T
- Reattempt the transfer of a returned call: Ctrl + R
- Transfer to Voicemail: F3
- Add to conference: Shift + Ctrl + F10
- Add to conference room 1: Shift + Ctrl + F11
- Add to conference room 2: Shift + Ctrl + F12

Application Hot Keys

- Restore SoftConsole application: Pause
- Switch between normal view mode and compact view mode: Home

BLF Short Cuts

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

Directory Short Cuts

- New directory search: Ctrl + S

- Call selected directory entry: Ctrl + C

- Display properties of selected entry: Ctrl + P

- Display search-item details of selected entry: Shift + Enter

- Send email to selected user: Ctrl + E

- Send message to selected user: Ctrl + M

- Directory view: Ctrl + Y

- Conference view: Ctrl + F

- Show/hide user entries: Ctrl + U

- Show/hide group entries: Ctrl + G

- Show/hide directory entries: Ctrl + D

Held Calls Short Cuts

- Answer held call: Ctrl + Alt + A

- Answer the call on hold for the longest time: Ctrl + Alt + L

- Conference with held calls: F8

- Transfer held call: Ctrl + Alt + T

Queue Mode Short Cuts

- Pickup call from queue 1: Shift + F1

- Pickup call from queue 2: Shift + F2

- Pickup call from queue 3: Shift + F3

- Pickup call from queue 4: Shift + F4

- Pickup call from queue 5: Shift + F5

- Pickup call from queue 6: Shift + F6

- Pickup call from queue 7: Shift + F7

- Pickup call from queue 8: Shift + F8

Tool Short Cuts

- Conference Room 1: Shift + Ctrl + F4

- Conference Room 2: Shift + Ctrl + F5

- Release Door 1: Shift + Ctrl + F1

- Release Door 2: Shift + Ctrl + F2

- Dial pad: Shift + Ctrl + F3

- Call voice mail: Ctrl + V

Park Slot Short Cuts

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

5.3 Toolbar Buttons

Main Toolbar

🔑	Login	↳	Hang up - Current Call
💾	Save Profile	•)))	Page
⌗↗	Make Call	🔴	Record Call
↑	Answer Incoming \ Waiting Call	⇕	Compact View
⌣	Hold Current Call	⊞	Dial Pad
→⌐	Transfer	1	Conference Room 1
✓⌐	Transfer Complete	2	Conference Room 2
@⌐	Reattempt Transfer	🔧	Preferences - Configure
CCC	Conference Calls Being Held		

Directory Panel

⌗↗	Call	👤	Show/Hide user entries
☑	Directory Entry Properties	👥	Show/Hide group entries
🔍	View Directory Items	⊡	Show/Hide directory entries
🔍	View Active conferences		

Held Calls Panel

↑	Answer the Selected Held call	CCC	Conference with Held Calls
⊡↑	Answer the Call with the Longest Holding Time	→⌐	Transfer Held Call

5.4 Trouble Shooting

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

There is an interval of several seconds after SoftConsole has been started that the operator cannot use these features. During this interval, the Directory Entry Properties or Group Service Status forms will display a close button, rather than the OK and Cancel buttons. Close the form, wait several seconds and then re-open the form to try again.

Unanswered Calls are Not Returned to the Operator

Contact your system administrator. 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.

Microsoft Outlook Warning Screen opens at Login

If directory access to Microsoft Outlook contacts folder has been selected in the Directories Tab ⁶¹, a Microsoft Outlook warning screen might appear when an operator is opening SoftConsole or using the option 'Send Email'. If the warning screen opens:

1. Select the **Allow access for check box**, and then click an amount of time in the list.

2. Click **Yes**. Yes must be selected to allow SoftConsole to retrieve Outlook contacts. For more information, refer to the Microsoft Support web site.

How to Export Directories

Local Directory entries can be exported in a .CSV file format. The directory export facility applies not just to the local directory but to all directories that are shown in the directory panel. For example, if only the Show Users Entries button is depressed then only the user entries will be exported. If an existing file name is selected the original file contents are overwritten.

To export the Operators Local Directory:

1. Click **Directory > Export**.

2. Enter a name for the file and click **OK**.

How Do I Delete a Profile?

Profiles can be removed if they are no longer required.

To delete a profile:

1. Click **File > Save Profile as**.

2. Select the profile to be deleted.

3. Press **Delete** button.

4. When all profiles to be deleted have been removed, click **Cancel** to return to the Main screen.

Hunt Group Directory Entry Does Not Show All the Group Members

For large hunt groups, the SoftConsole is currently limited to showing only the first 102 group members.

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