IP Office™ Platform 10.0

Using Avaya IP Office™ Platform SoftConsole

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Chapter 1.

IP Office SoftConsole

1. IP Office SoftConsole

IP Office 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 receptionist to see the status of other users and to adjust some basic telephony settings of other users such as forwarding numbers.

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.

Telephone Support

You still require an extension which is used to provide the speech path for calls.

- It is recommended that IP Office SoftConsole is only used with a telephone that support auto-answer. If used with phones that do not support auto-answer (analog phones and most SIP/DECT phones), when making a call while the phone is on-hook, the telephone system first calls you and only makes the outgoing call when you answer (go off-hook).

1.1 Logging In

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

To start IP Office SoftConsole:

1. Select **Start** and click on the ▌⑤ **SoftConsole** icon.

2. The login window appears if there are still licenses available.

> **IP Office SoftConsole / Login** ✕
>
> SoftConsole Login
>
> User Name/Extn:
> `701`
>
> Password:
> `●●●●●●●●●●`
>
> IP Office/IP-Address:
> `192.168.0.214`   ☐ Use secure communication
>
> [Expand] [OK] [Cancel] [Help]
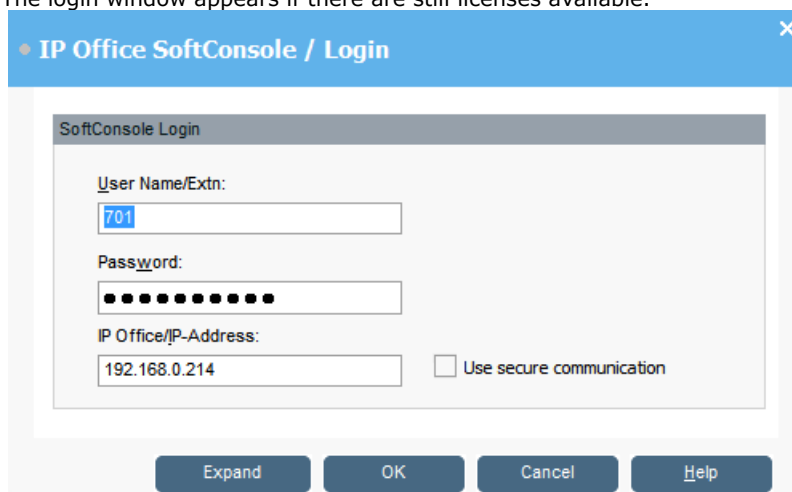
   a. **User Name/Extn**
   Enter your user name or extension number. The user name is case sensitive.

   b. **Password**
   Enter your user password. This is given to you by your system administrator and is case sensitive.

   c. **IP Office/IP Address**
   Enter the IP address of the telephone system.

   d. **Use secure communication**
   Select this option to use encrypted communications between the console and the telephone system.

3. To login now, click **OK**. Alternately, you can click **Expand** to view additional options that can be set before logging in.

> Profile Settings   Telephony
>
> Profile: ☐ Call Waiting
> AdminTemplate1   ▼   ☐ Off-hook Station
>   ☑ Show Templates
>
> [Compact] [OK] [Cancel] [Help]
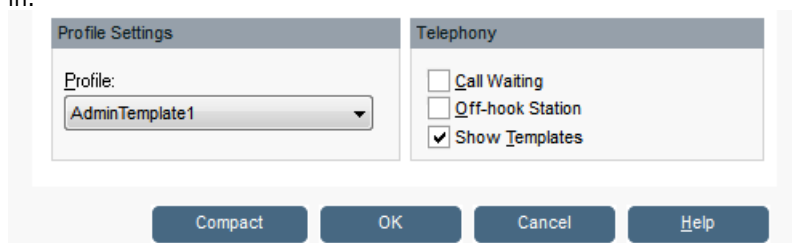
   - **Profile**
   You can save your console settings as a profile 68ᐟ. When logging in, select the profile here to reapply that profile's settings.

   - **Call Waiting**
   When selected, the system provides a call waiting tone when you are on a call and another incoming call arrives. When you end the current call, the new call is immediately presented to you. This option is ignored if you have multiple call appearances on your telephone.

   - **Off-hook Station**
   This feature is used by receptionists that use the hands free features of the telephone. Console 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 the default console templates are included in the list of profiles. See Default Templates 71ᐟ.

4. Click **Compact** to return to the normal logging in menu. Otherwise, click **OK** to login with the settings selected.

1.2 The Main Window

In normal view mode, the console screen is divided into the possible areas below. The profile or template selected when logging in sets whether the held calls, BLF and park slots panels are shown. Profiles and templates can be edited, see Profiles 68ᐟ. The console can also be run in a compact mode, see Compact View 12ᐟ.
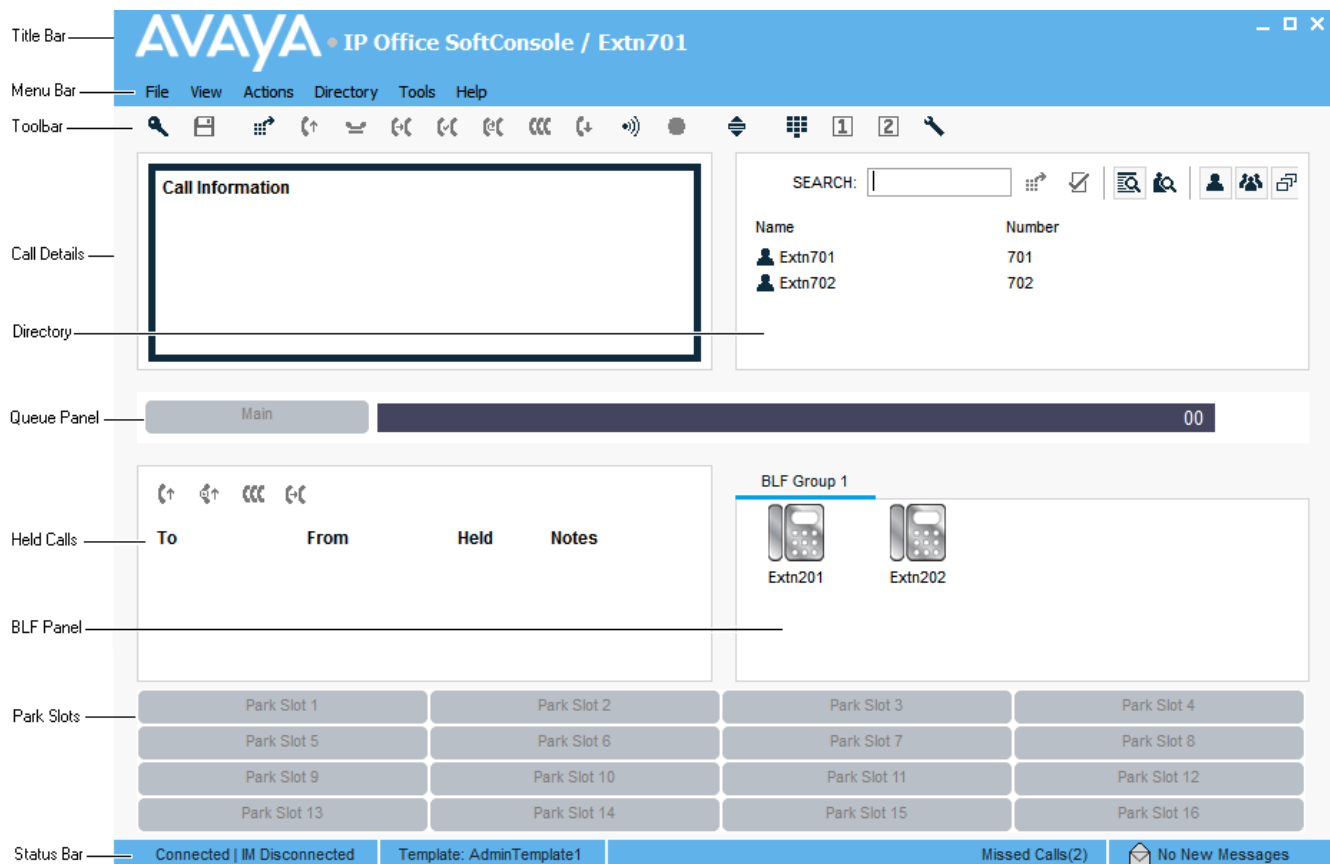
- **Title Bar** 53ᐟ
  The Title Bar contains the name of the person who has logged in. When the console is the active program, the title bar is red. If the console is not the active program, the title bar grey.

- **Menu Bar** 17ᐟ
  Commands and actions are available through menus. Some items are only accessible when the right conditions occur, for example, when a call is ringing.

- **Toolbar** 77ᐟ
  The toolbar provides short cuts for options that are frequently used. The toolbar can be shown or hidden using the **View** menu option.

- **Call Details Panel** 16ᐟ
  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 48ᐟ or conferencing details 29ᐟ.

- **Queue Panel** 27ᐟ
  The Queue panel displays graphical information on the status of calls held in queues.

- **Held Calls Panel** 25ᐟ
  Any calls that are being held are listed in this panel.

- **BLF Panel** 14ᐟ (Busy Lamp Field Panel)
  The icons represent dialable numbers. If the icons represent internal users, the user's status is indicated.

- **Call History** 13ᐟ
  Shows a list of recent incoming, outgoing and missed calls. When selected, the call history replaces the Held Calls and BLF Panels.

- **Park Slot Panel** 26ᐟ
  The park slot panel can contain up to 16 park slot buttons.

- **Status Bar** 17ᐟ
  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.

1.3 Compact View

The console can be run in compact or normal view modes. In compact mode, only the calls details and directory panels are shown.

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.
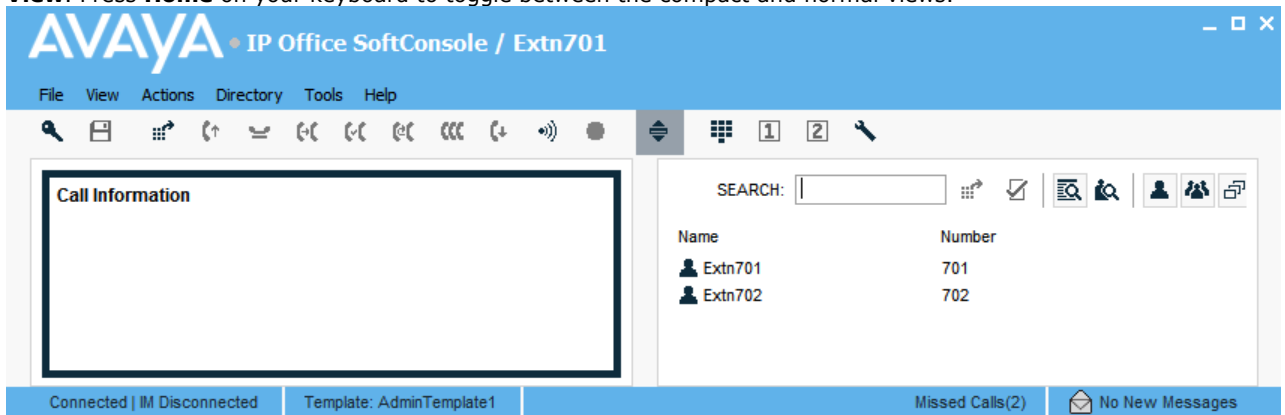
1.4 Viewing the Call History

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.

	In(4)	Out(6)	! Missed(2)	All(12)		
	Number		**From**	**To**	**Tag**	
!	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

The call history pane is divided into the following tabs. Each tab displays a maximum of 100 calls. When the maximum capacity is reached, the oldest record is deleted to add a new record. The number in brackets shows the number of calls listed.

- **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.

Within each tab there are the following fields:

Field	Description
Call Status Icon	• **(Outgoing call:** Indicates a call that was made from your extension. • **) Incoming call:** Indicates a call that was made to your extension. • **! Missed call:** Indicates a call that was not answered.
Number	Either the incoming telephone number or the telephone number that was called.
From	The name that is associated with the number in the directory on the main system or your local console directory.
To	The name that is associated with the called number in the directory on the main system or your local console directory.
Tag	Text that was entered to identify the call. See Adding Call Tag Text 32.
Date & Time	The date and time that the call happened.

To make a call:

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

To clear the call history:

   1. Right-click on the call history.

- Select **Clear** to remove all the calls from the currently selected tab.

- Select **Clear All Tabs** to remove all calls from all the tabs.

To return to the Held Calls and BLF panels view:

   1. Click **View | Call History** again.

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1.5 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.
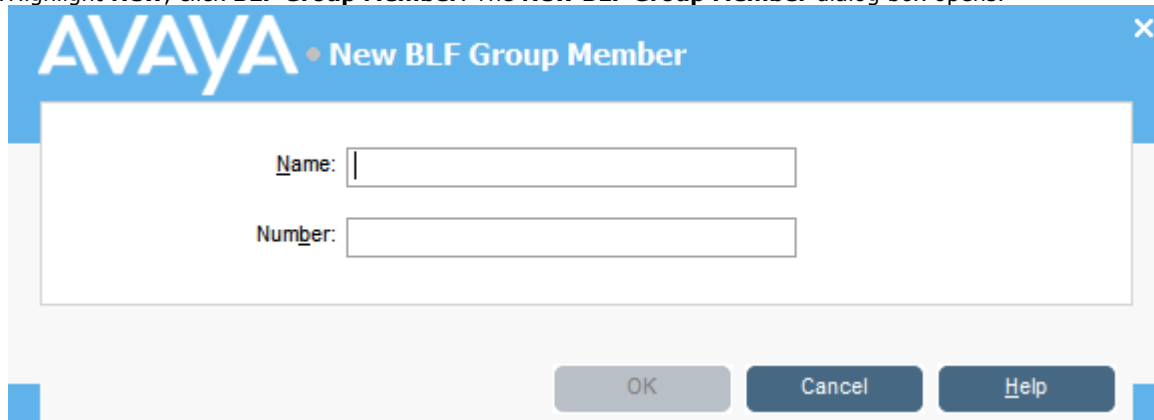
- **Name Order** (Ctrl+Alt+N)

- **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.

1.5.1 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.

1.6 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 you to adjust the size of the panels as required.

The panel on the left contains details about the current calls. When a single call is in progress, either ringing or connected, 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, ie. it will answer the selected call whilst putting any previously connected call on hold.

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.

- **Call Status**
  States the progress of a call. The border around the Call Details Panel changes color to indicate the status of a call. See Appearance tab 53 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. See Adding Text to a Call 32 in the Features section.

1.7 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 | IM Disconnected | Template: AdminTemplate1 | Missed Calls(2) | No New Messages |

- **Connected/Disconnected**
  Displays whether the console application is connected to the telephone system.

- **IM Connected/IM Disconnected**
  Displays whether the console application is connected to the instant messaging server. See Instant Messaging 66.

- **Template/Profile**
  Shows which default template or saved user profile the console is using.

- **Missed Calls**
  Shows the number of missed calls currently in the call history. See Viewing the Call History 13.

- **New Messages**
  Show the number of new messages in your mailbox. See Collecting Your Voicemail Messages 35.

1.8 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.

| File | View | Actions | Directory | Tools | Help |
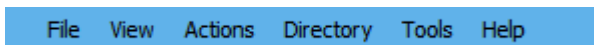
The options available in each menu are:

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

- **View**
  Select to run console in normal or compact mode 12 and whether to view the call history 13. Also select the display language and whether to show or hide the toolbar. If logged on in administrator mode 69, 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, see Viewing the Call History 13.

- **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, search, export and setup the directory.

- **Tools**
  This menu gives access to menus for various functions.

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

1.9 Change Language

You can select which language in which you want to run the console. The console supports the following languages:

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

To change the console language:

1. Click **View** and select **Language**.

2. Select the language required.

3. The console immediately changes to use the new language.

4. To save the change as part of your profile, click the 💾 icon.

1.10 Multisite Network Features

Previously, some IP Office SoftConsole features were not supported for user, groups, etc. on other telephone systems in a multisite network. For Release 9.0 and higher, the information provided by the telephone system to the console has been enhanced to allow those existing console features to now be used across a multisite network. Affected features are:

- Park slots 26.

- Hunt group queue monitoring 27 and longest waiting call pickup 27.

- Park against a busy extension 23 (Ctrl+B)

- Configuration of user forwarding, DND, etc 43.

- Setting hunt groups in or out of service 42.

- Call tagging 32.

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 IP Office SoftConsole directory, a script file is associated with the incoming number, the script is shown in the right call panel.

To answer an incoming call:

1. Use any of the following methods:

   - Press **Enter**.

   - Click .

   - Click **Actions | Answer Call**.

   - Pick up the handset on your telephone or press the headset or speaker button.

   - 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 a Call
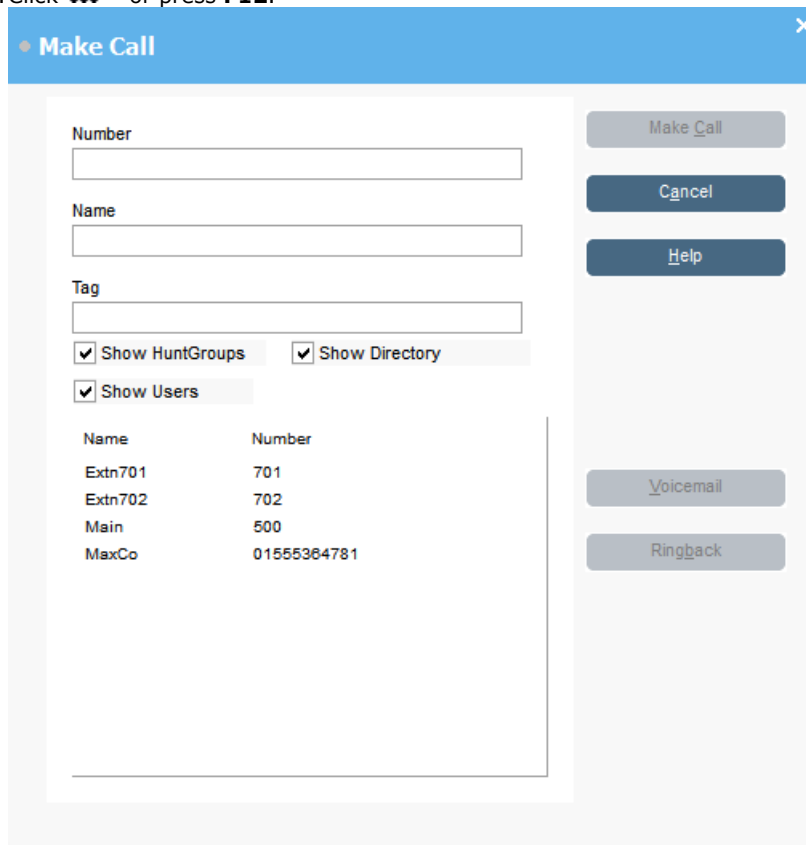
There are several ways to make a call from IP Office SoftConsole.

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. Click ⠿↗ or press **F12**.
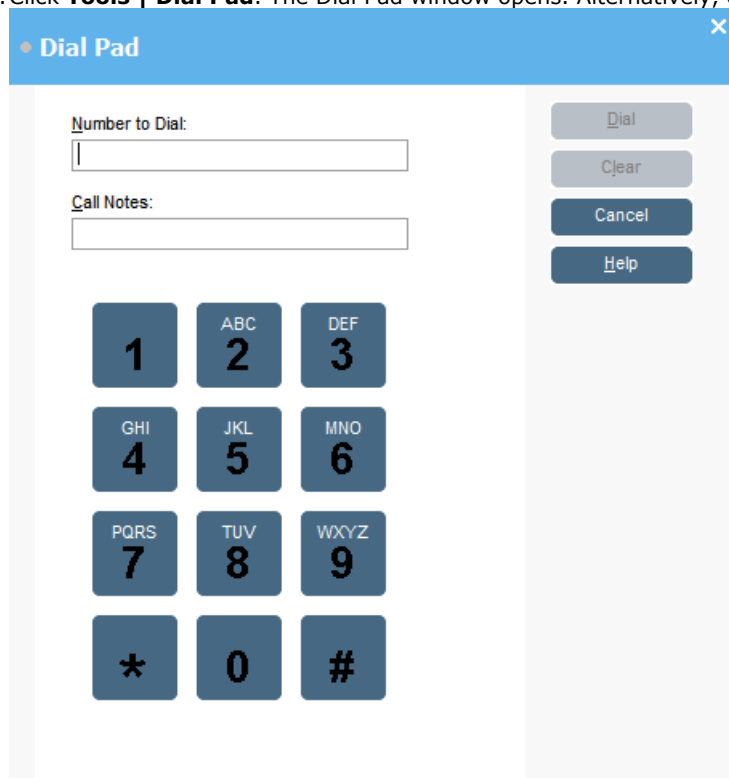
2. Select the directory that you want to search. You can select more than one directory.

3. Start entering the name in the **Name** field. The entries listed change to show only those that match the text entered. When the required entry can be seen in the listing, click on it. The number is transferred to the Number field. When there is only one match, the number is automatically transferred to the **Number** field.

   - Note: You can also select an entry by starting to enter the number in the **Number** field. As above, the entries listed change to show only those that match the partial number.

4. Enter a tag message if required. See Adding Text to a Call 32.

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.

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2.3 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. Enter any notes for the call in the Call Notes area. These are used as the call tag text. See Adding Call Tag Text 32ᐧ.

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

2.4 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. 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 23 .

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

2.5 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.

2.6 Re-Attempt Transfer
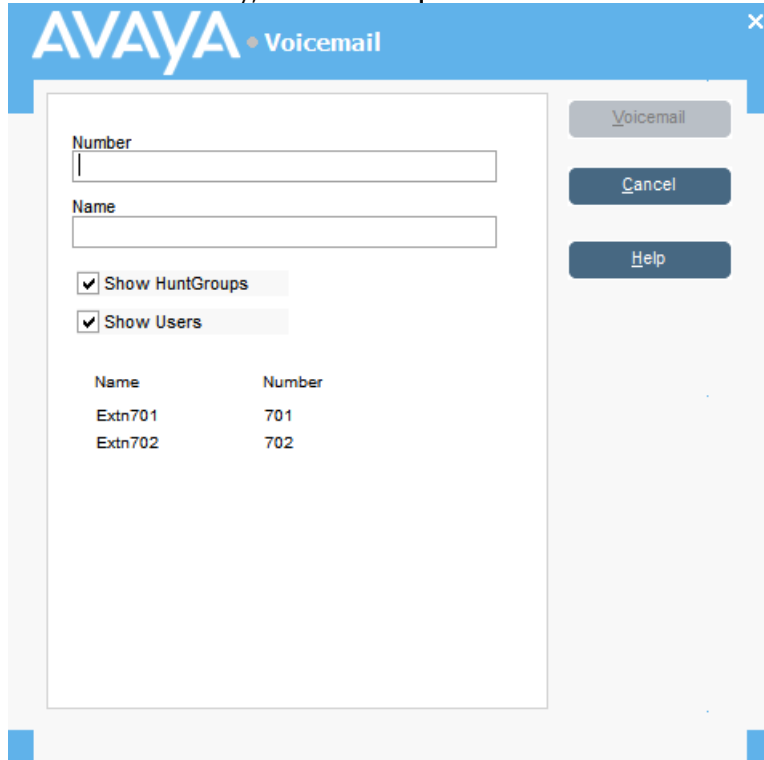
When a call is held against a busy extension 23 using **Ctrl+B**, when that extension becomes free the call is represented to the IP Office SoftConsole with a yellow border and indicating that the original target extension is now free. At this point you can either answer the call to do a normal supervised 23 or unsupervised transfer 23 or you can use **Ctrl+R** to do an immediate unsupervised transfer without answering the call.

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2.7 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**.

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**.

2.8 Using Hold
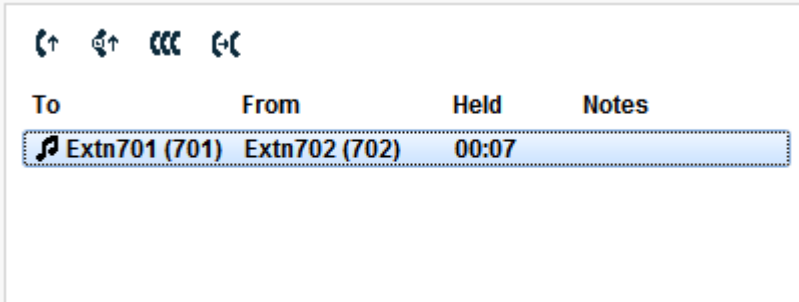
A call can be put on hold so that you can perform another task.

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. The time a call remains on hold, if you are free, is controlled by the telephone system. The default is 15 seconds. See your system administrator.

The Held Calls Panel

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 that call.

- ↥ **Answer the selected held call**

- ↥ **Answer the longest held call**

- ⅭⅭⅭ **Conference the held calls**

- ↤ **Transfer the selected held call**

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2.9 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". See Using Page 35ᐧ.

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.

IP Office SoftConsole provides parking slots for 16 calls, all with a specific park ID. See Configuring Park Slots 62ᐧ.

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. See Collecting a Parked Call 26ᐧ.

To park a call:
1. While connected to the call, click on a vacant park slot button to park the call in that slot.

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

To unpark a call:
1. When a call is parked in a park slot, click the relevant Park Slot button to unpark the call.

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

2.10 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 console users have a park slot button set to the same park slot number, the button indicates the parked call. They can click the button to unpark the call.

- On Avaya telephones with programmable buttons, 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.

2.11 Reclaiming a Call

You can attempt to reclaim the last incoming call presented to the console. 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 console users, the reclaim function may reclaim a call that was presented to you but then answered by one of the other IP Office SoftConsole users.

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

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2.12 Monitoring Queues

Hunt groups can be configured with queuing. When their are more calls waiting to be answered than agents available to answer, the additional calls are queued. You can configure your console to monitor up to 8 hunt group queues. See Configuring Queues 63 .

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.

2.12.1 Answering a Queued Call

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

To answer a queued call:
1. Click the **Queue Name** button. The first call in the queue is presented to you. Alternatively, press Shift+F1 to Shift+F8.

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.

2.13 Conferences

A IP Office 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** 29
  You can place several calls on hold and then start a conference between those calls.

- **Use Conference Rooms** 30
  Console has two conference rooms where conferences 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** 29
  You can view all existing conferences and add a caller to any of those conferences.

2.13.1 Conferencing Held Calls

Using IP Office 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 Using the Conference Rooms 30 .

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.

2.13.2 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 IP Office SoftConsole conferences.

To view a conference:

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

2.13.3 Adding Users to a Conference

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

To add a caller to conference:
1. Answer or make a call to a user.

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

3. Click the required conference.

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

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2.13.4 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. See Conference Configuration 56 in the Configuring IP Office 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.
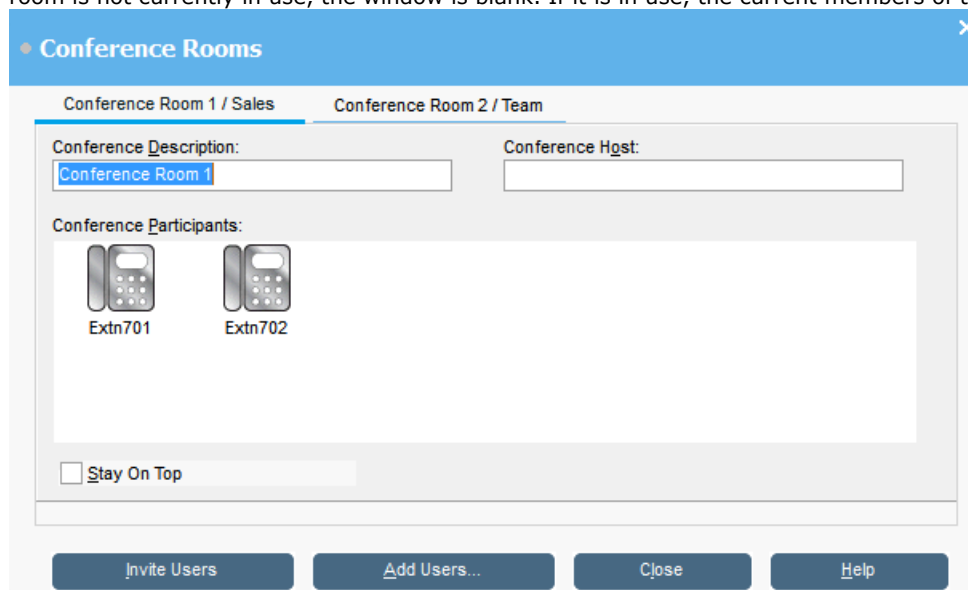
2. In the **Conference Description** area, type the subject of the conference. The subject only shows on the conference room form.

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. See Viewing Conferences 29.

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***.

2.14 Adding Call Tag Text

Text can be associated with a call by the telephone system or by any user on the call. This feature is known as call tagging. The text remains with the call when it is transferred and is displayed on the telephones if internal. The text is also recorded within the call history, see Viewing the Call History 13. For users with one-X Portal for IP Office, it appears as the call subject.

You can add a call tag when making 21 or transferring 23 a call with the console. Alternatively, you can add a call tag while connected to the call using the process below.

By default, the length of a message is up to 16 characters. However, this can be changed, see Administrator Mode Overview 69.

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

2. Type the required details. Alphanumeric characters can be used but not commas. Click **OK**.
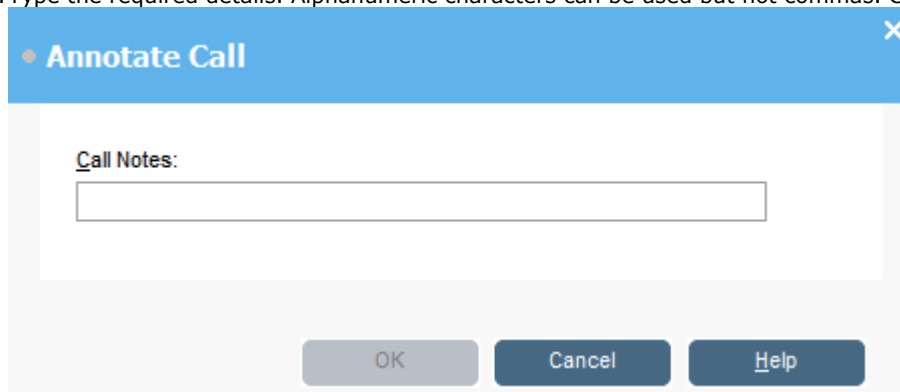
2.15 Door Release

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. See Configuring Door Release 58.

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

To open a door:
1. Click **Tools | Door Release**.

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

2.16 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.
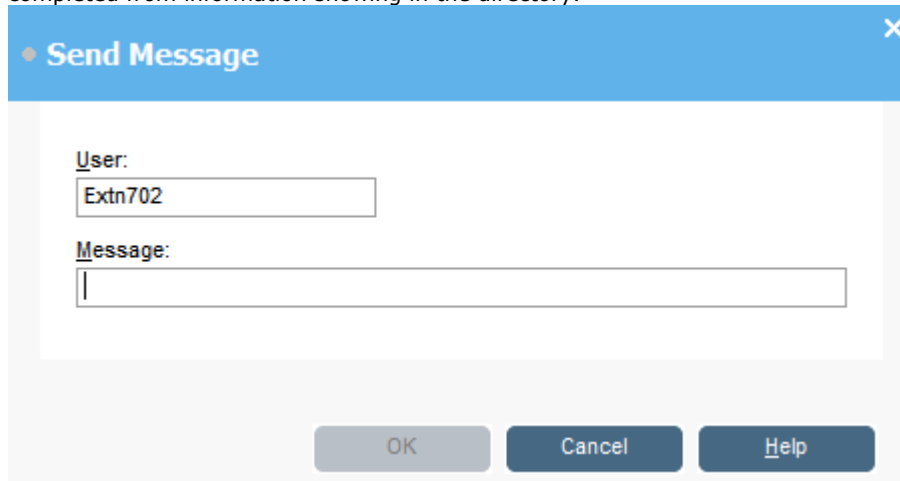
2.17 Sending a Text Message

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

- By default, the maximum length of a message is 16 characters. However, this can be altered, see Administrator Mode Overview 69ᐟ.

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

To send a text message:

1. Locate the user in the directory.

2. Click **Actions | 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**.

2.18 Instant Messaging

The console can be [configured to support instant messaging](#) 66. When enabled, you can use the console directory to select and send instant messages to a user.

The other user must be using an application that also supports instant messaging. That can be one-X Portal for IP Office, one of the one-X Portal for IP Office plug-ins, one-X Mobile Preferred for IP Office or one-X Communicator.

To instant message a user:
1. In the directory pane, locate the required user. Right-click on the user and select **Send Instant Message**. Alternately, press **Ctrl+**.

2. The separate instant messaging window opens.
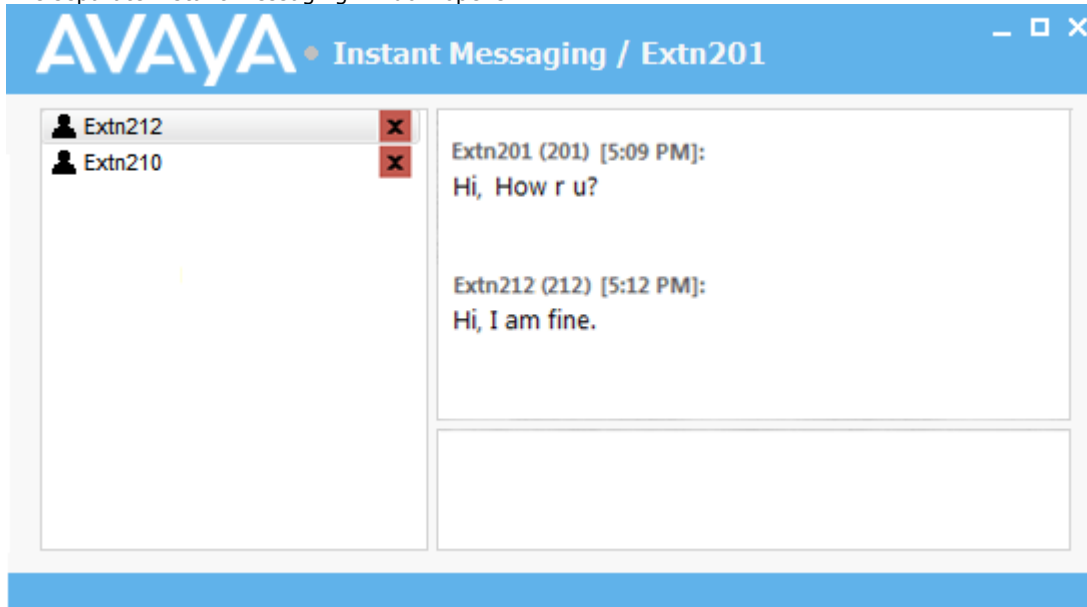
3. Enter the message in the box at the base of the window.

4. You can switch between the instant messaging window and the console without interrupting the operation of either. However, closing the instant messaging window ends any current chat sessions you have in that window.

2.19 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**.

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2.20 Using Page

You can broadcast to a 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**.
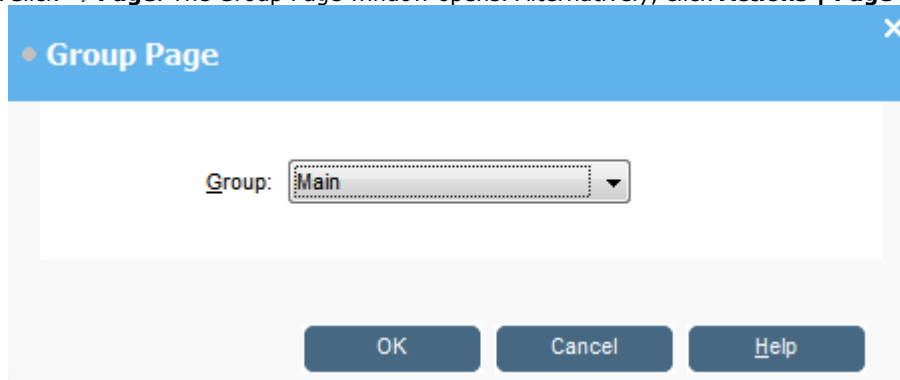
2. Select the group to broadcast to and click **OK**.

3. Speak the message.

4. Click ↲ **Hang Up** to end the page. Alternatively, click **Actions | Hang Up** or press the **End** button.

2.21 Send Email

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

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.

2.22 Collecting Your Voicemail Messages

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

To collect your messages:

1. Double-click the area that shows the number of new messages. Alternatively, press Ctrl+V.

2. You are connected to the voicemail server.

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

4. Enter your voicemail password and press #.

5. When you have successfully logged in to your mailbox, you hear an announcement to tell you about the messages that you have.

Chapter 3. Directory

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3. Directory

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

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

- **⠿🠖 Call the selected entry**
  Make a call to the selected directory entry.

- **☑ Edit the selected entry**
  Edit the properties of the selected directory entry. See Editing Directory Entry Properties [40].

- **▤🔍 View Directory Items**
  Use the directory panel to view directory entries.

- **🔍 View Active Conferences**
  Use the directory panel to view conferences being hosted by the telephone system.

- **👤 Show/Hide user entries**
  Show or hide user telephone system users in the directory panel.

- **👥 Show/Hide group entries**
  Show or hide telephone system hunt groups in the directory panel.

- **🗗 Show/Hide directory entries**
  Show or hide telephone numbers from the telephone system directory, local console directory and or Outlook.

  - You can select which directories are included, see Directories Tab [57].

  - You can edit the local console directory, see Incoming Calls Tab [48].

Directory Icons

When viewing directory entries, the following icons are used for the different types of entry.

- **👤 User**
  A user on the telephone system.

- **👥 Hunt Group**
  A hunt group on the telephone system.

- **🗗 Directory**
  A directory entry from the telephone system directory or the local directory.

- **◱ Outlook Contact**
  A contact from Outlook running on the same PC as the console.

Directory Entry Details

When the search has only one remaining match or when you double-click on a particular entry, the directory changes to show details for that entry. The information to display can be configured through the console settings. See Directories Tab 57.

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

Property	Value
Name:	Anne Webb
Number:	209
Busy Status:	Idle
Do Not Disturb Status:	Off
Login Status:	Logged In
Group Status:	
Main	Out of Group
Sales	In Group
CustomerHelp	In Group
Absent Message:	
New Voice Mail Messages:	2
Forwarding Status:	
Forward Unconditional:	Off
Forward On No Answer:	Off
Forward On Busy:	Off
Follow Me:	Off
Forward Hunt Group Calls:	Off

3.1 Editing 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.

- **User**
  A user is indicated by the icon. See The User Directory Entry Form 43.

- **Directory**
  A directory entry is indicated by the icon. See The Directory Entry Form 41.

- **Hunt Group**
  A group is indicated by the icon. See The Group Service Status Form 42.

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

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

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3.1.1 The Directory Entry Form
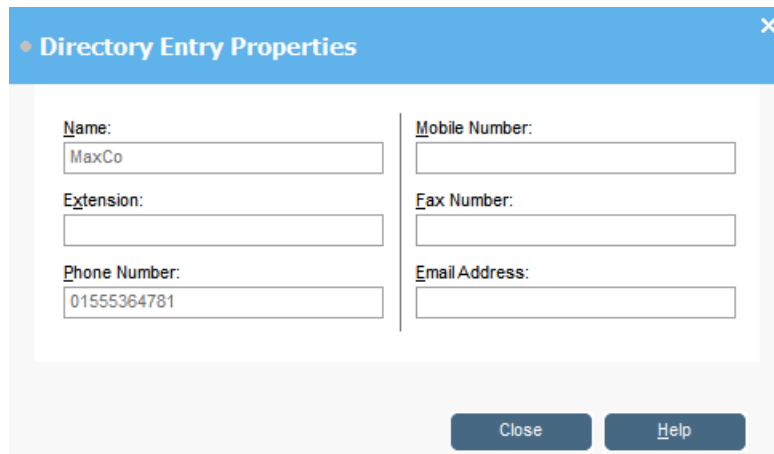
The **Directory Entry** form that opens depends on whether the number is from the telephone system directory or from the local console directory.

To open a directory entry properties form:

1. Click ⊡ in the IP Office SoftConsole directory panel.

2. Select the directory entry and click ☑. Alternatively, right-click on the entry and select **Properties**.

Telephone System Directory Number
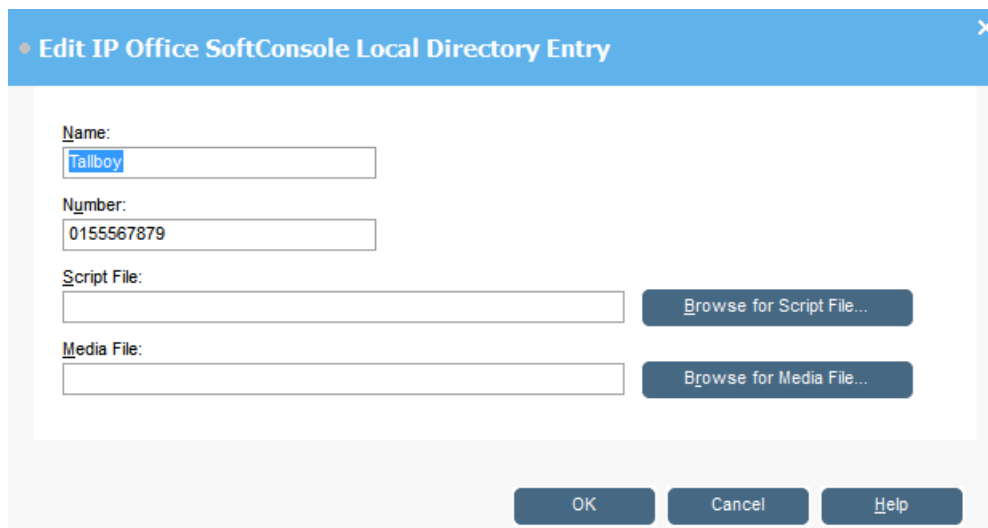
The telephone system with which IP Office SoftConsole is working includes a directory of names and numbers. These are used both for outward dialling and to match names to incoming caller numbers. Entries in the telephone system directory are available to all users through directory functions on their telephones.

The only fields used for an telephone system directory number are the **Name** and **Phone Number**. These can not be changed through the IP Office SoftConsole.

IP Office SoftConsole Directory Number

The console 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 console directory, the name in the console directory is used. See Adding/Editing Local Entries 49 for details of the fields.
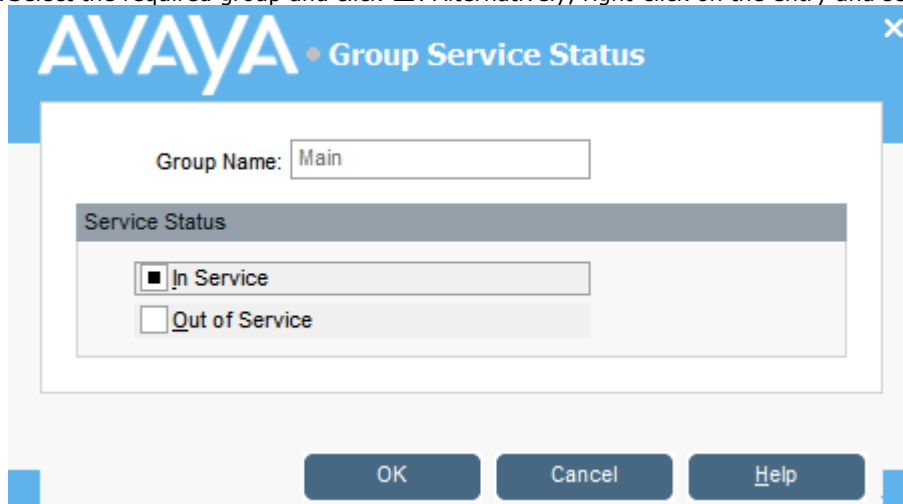
3.1.2 The Group Service Status Form

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 console are not automatically updated if already being displayed. The values displayed in the console directory are those current when the user/group was selected.

To open a group directory entry properties form:

1. Click 👥 group in the IP Office SoftConsole directory panel

2. Select the required group and click ☑. Alternatively, right-click on the entry and select **Properties**.

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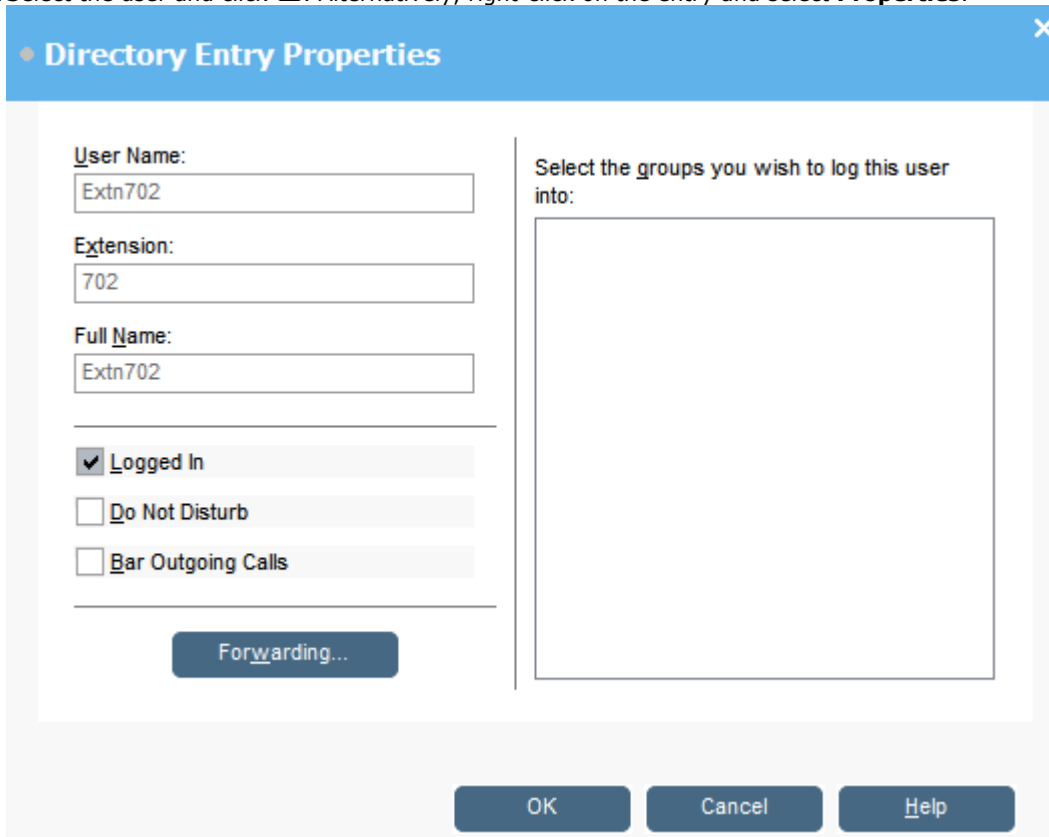
- A third status setting, **Night Service**, is set either automatically by time settings or by the use of special dialling codes.

3.1.3 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 IP Office SoftConsole directory panel.

2. Select the user and click ☑. Alternatively, right-click on the entry and select **Properties**.

3. Some details are for information only and cannot be changed. Those are the **User Name**, **Extension**, **Full Name** and **Logged In**.

4. You can change the following details.

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

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

- **Forwarding Button**
  Click this button to display the users forwarding settings. See The Forwarding Status Window [44].

- **Group Status**
  A list of the hunt groups that the user belongs. If the group is checked, the user is 'in group' (receiving calls for that group).
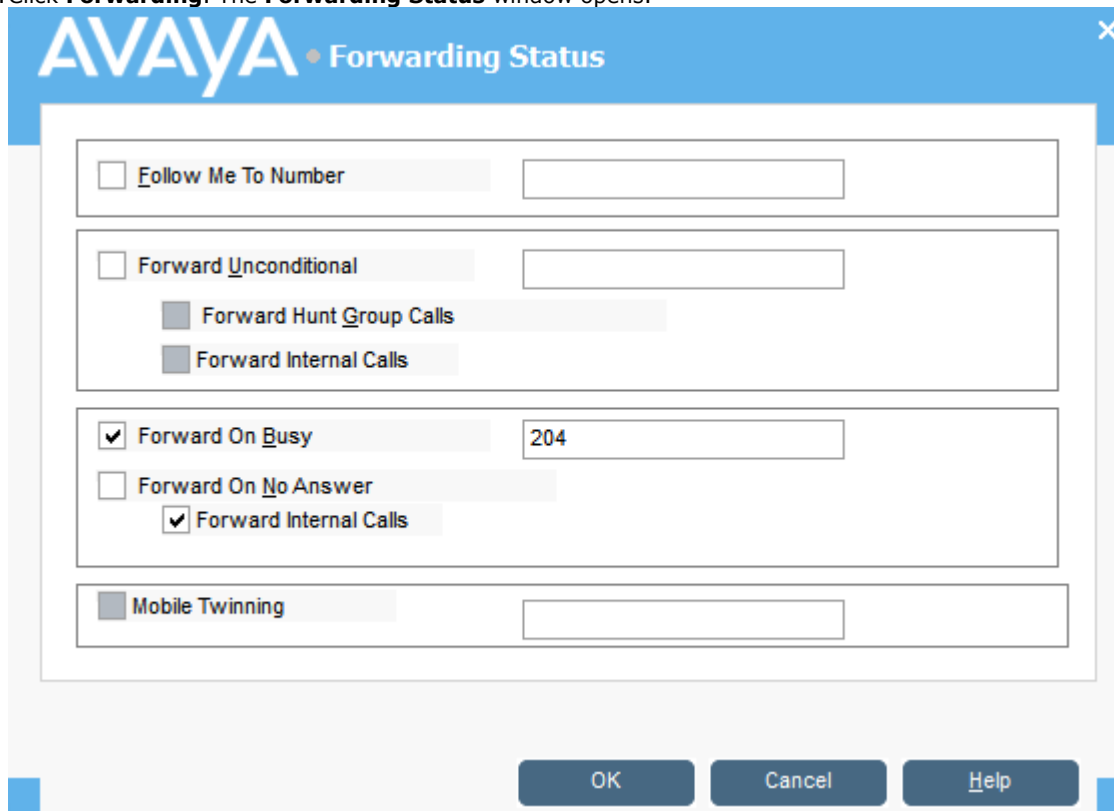
3.1.3.1 Setting Follow Me and Forwarding

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. See Follow Me and Forwarding Behaviour 46. Mobile twinning can also be set in this window. See Mobile Twinning 45.

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

To configure the forwarding options:

1. Click the required user ♟ in the IP Office 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. See your system administrator.

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

3.1.3.2 Mobile Twinning

If twinning is enabled in the telephone system, any incoming calls ring the extension number and 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. 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 IP Office 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 console are not automatically updated if already being displayed. The values displayed in the console directory are those current when the user/group was selected.

To set mobile twinning:

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

2. Click ☑. Alternatively, right-click on the entry and select **Properties**.

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.

3.1.3.3 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 ⁴⁶.
- Forward unconditional ⁴⁷.
- Forward on busy ⁴⁷.
- Forward on no answer ⁴⁷.

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. 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. 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. 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. 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. 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. 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.

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3.2 The Local Directory

You can setup directory names and numbers. These can then be shown in the directory panel as the console's local directory. 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 to display and/or media file to be played when the console receives a call from a matching number.

To view the local directory:

1. Click ⚲ **Preferences** and select the **Incoming Calls** tab. Alternatively, select **Tools | Preferences-Configure | Incoming Calls**.
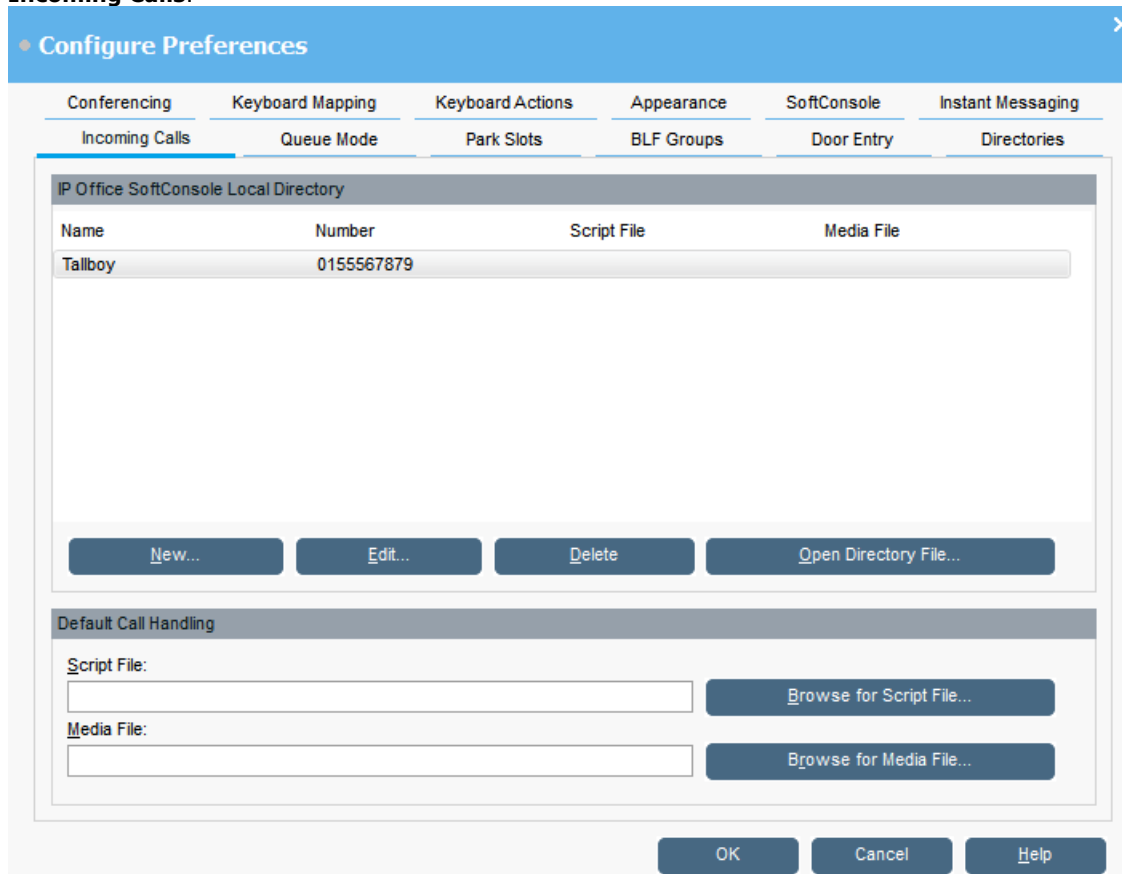
2. The current console directory entries are listed. Select the action to perform using the available buttons:
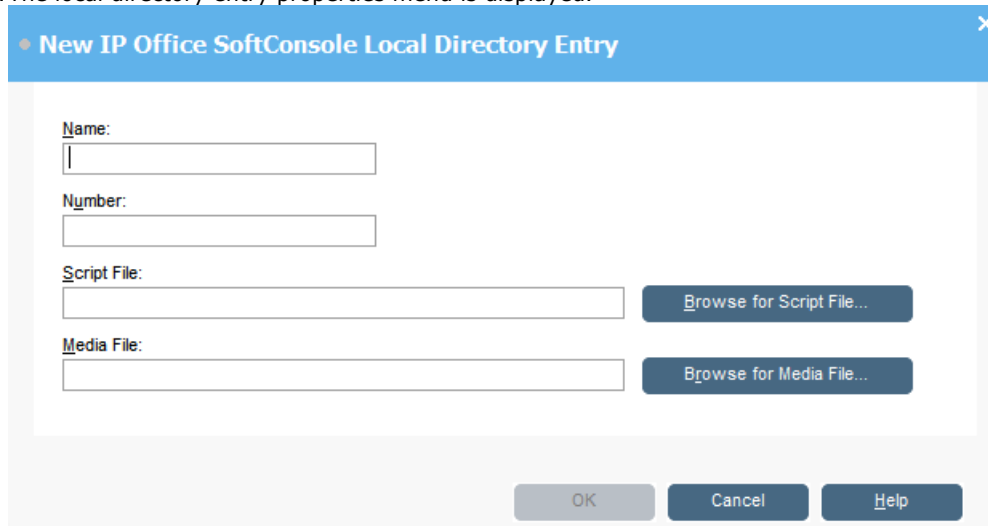
   - **New**
     Add a new directory entry. See Configuring Directory Lists 49.

   - **Edit**
     Edit the selected entry. See Configuring Directory Lists 49.

   - **Delete**
     Delete the selected entry.

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

   - **Default Call Handling**
     You can set a default script and/or default sound file. These are used when the incoming call does not match a specific number which has its own script or sound file defined.

     - **Script File**
       The script can be a.TXT or .RTF file. The script is displayed in the directory panel when an incoming call is received and answered.

     - **Media File**
       The file is a .WAV file. The sound is played by the console PC.

3.2.1 Adding/Editng Local Entries

From the Incoming Calls tab 48, you can create new entries and edit the properties of existing entries.

To add or edit a local directory entry:

1. Click ✎ **Preferences** and select the **Incoming Calls** tab. Alternatively, select **Tools | Preferences-Configure | Incoming Calls**.

    - To add a new entry, click **Add**.

    - To edit an existing entry, select the entry and click **Edit**.

2. The local directory entry properties menu is displayed.

    - **Name**
      The name that you want associated with the directory entry.

    - **Number**
      The telephone number that is dialed when the directory entry is selected. This number is also used for matching against incoming calls.

    - **Script File**
      A script can be associated with the directory entry. When an incoming call matches the directory number, the script is displayed in the directory panel. The script can be a.TXT or .RTF file.

    - **Media File**
      A sound file can be associated with the directory entry. When an incoming call matches the directory number, the file is played by the console PC. The file is a .WAV file.

3. Click **OK**.

Chapter 4. Configuring SoftConsole

4. Configuring SoftConsole

The console **Preferences** menus allow you to configure a range of console settings.
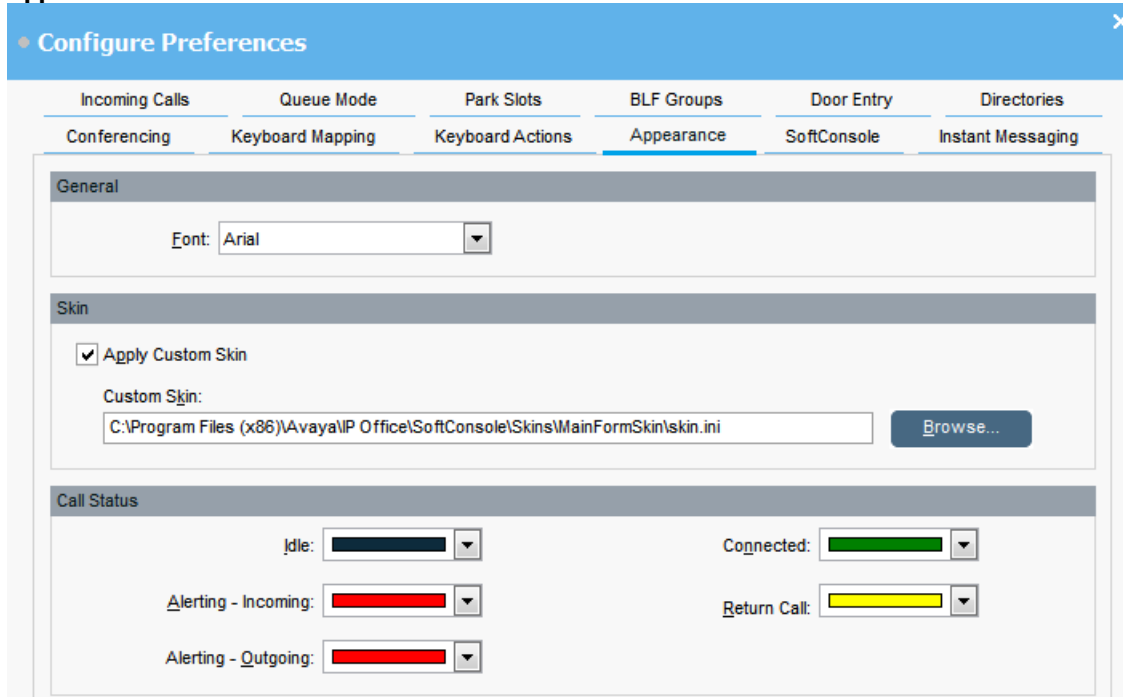
- **Appearance** 53
  Change the general appearance of the console. For example, the font used and the colors used to indicate call status.

- **BLF Groups** 54
  BLF Groups can be created, edited and deleted. The order that the groups are shown can also be rearranged.

- **Conferencing** 56
  Enter the names of the Conference rooms.

- **Directories** 57
  Specify what directory information can be included in the directory display and what information can be included in the properties of individual entries.

- **Door Release** 58
  Enter a door name for the option to become active.

- **Incoming Calls** 48
  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.

- **Keyboard Actions** 59
  You can customize the default actions performed by the console when you start typing text or a number.

- **Keyboard Mapping** 60
  You can see and change the keyboard short cuts used for different console functions.

- **Park Slots** 61
  Specify the park slot buttons that are available and what park slot IDs are associated with those buttons.

- **Queue Mode** 63
  Configure and monitor up to eight hunt group queues.

- **SoftConsole** 65
  Configure how the console saves any changes that you make to the screen layout and behaviour when minimized or closed.

- **Instant Messaging** 66
  Configure whether the console supports instant messaging and set the address details of the messaging server.

4.1 Appearance Tab

From this tab, you can change the general appearance of the IP Office SoftConsole. For example, you can change the font used, the colors used to indicate call status.

To change the console appearance:

1. Click ✎ **Preferences** and select the **Appearance** tab. Alternatively, select **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 console. If not selected, the console defaults to the traditional skin used for pre-release 10.0 systems.

- **Custom Skin**
  If selected, you can browse to the location of the skin definition file. Currently only the 'blue' skin used by default for new console installations is supplied as a custom skin.

- **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**

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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**.
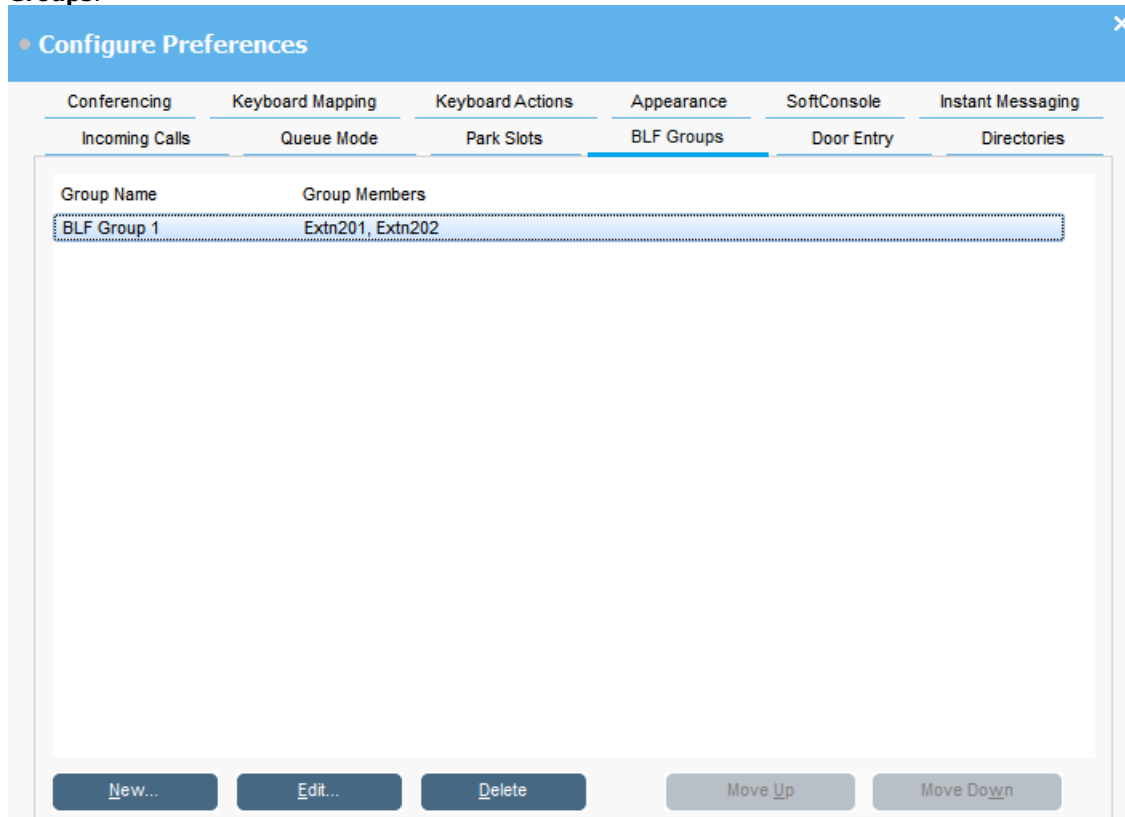
2. The menu displays the name of each group and the names of its members. You can use the control buttons to adjust the BLF groups.

- **New**
  Create a new group. See Configuring BLF Groups 55ᐟ.

- **Edit**
  Edit the current select group. See Configuring BLF Groups 55ᐟ.

- **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.

4.2.1 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 a 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:
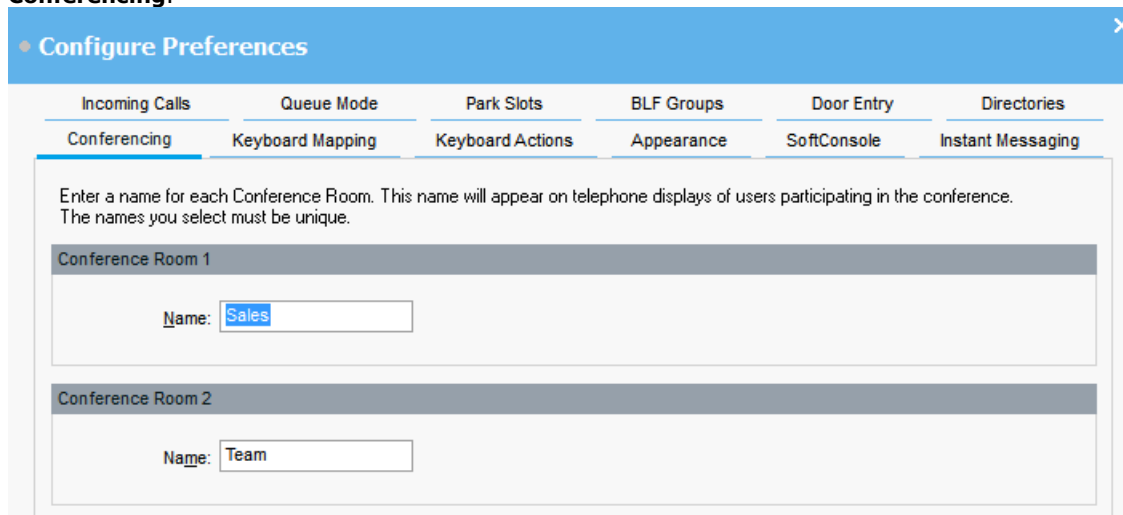
1. Click ✎ **Preferences - Configure | BLF Groups**. Alternatively, click **Tools | Preferences-Configure | BLF Groups**.

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.

4.3 Conferencing Tab

You can name the two conference rooms supported by the console. 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** and select the **Conferencing** tab. Alternatively, select **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.

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4.4 Directories Tab

You can specify the directory information that is included in the directory display [38]. You can also specify the information that is included in the properties of individual entries.

To view the Directories configuration tab:

1. Click ✎ **Preferences** and select the **Directories** tab. Alternatively, select **Tools | Preferences-Configure | Directories**.
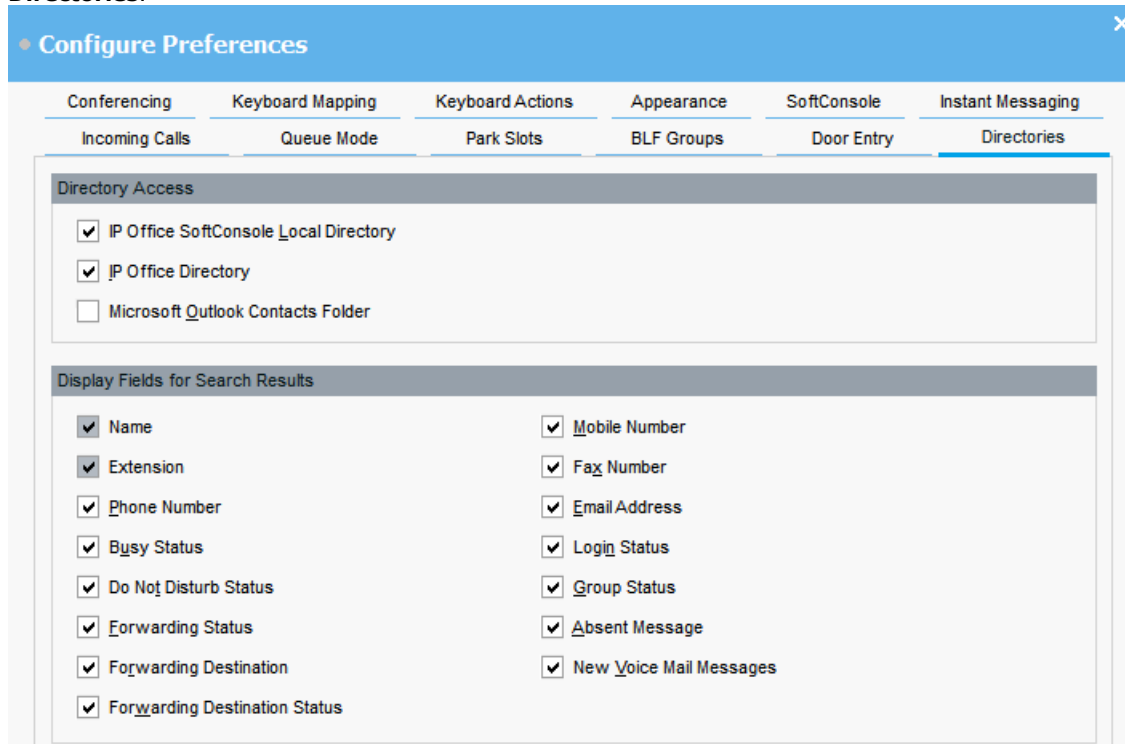
2. **Directory Access Section**
   When 🗗 is pressed in the directory, it shows directory numbers other than users and groups. The **Directory Access** options specify from where those other directory numbers are obtained.

   - **SoftConsole Local Directory**
     These are directory numbers and associated names stored by the IP Office SoftConsole. See Incoming Calls Tab [48].

   - **IP 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. Note that this feature requires Outlook to be running with Administrator privileges.

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.
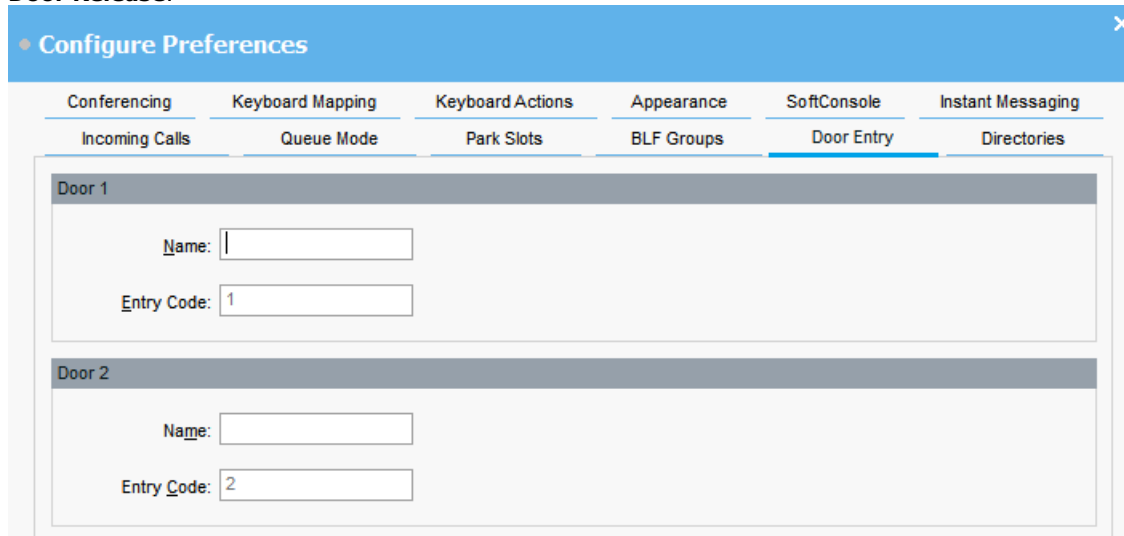
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4.5 Door Release Tab

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

To enter the door names:

1. Click ✎ **Preferences** and select the **Door Release** tab. Alternatively, select **Tools | Preferences-Configure | Door Release**.

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. The **Entry Code** field contains the number of the door relay to activate, either 1 or 2. The entry codes can not be changed.

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

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

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4.6 Keyboard Actions Tab

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

To view the Keyboard Actions configuration tab:

1. Click ✎ **Preferences** and select the **Keyboard Actions** tab. Alternatively, select **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 the console in administrator mode. See Administrator Mode ⌐69⌐. The length specified also applies to text messages sent with **Send Message** ⌐33⌐. The default is 16 characters. If this value is increased, the note might not be fully shown on all telephones and applications.

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4.7 Keyboard Mapping Tab

You can see and if required change the keyboard short cuts used by the console. See Short Cut Keys 74ᐠ.

To view the Keyboard Mapping configuration tab:

1. Click ✎ **Preferences** and select the **Keyboard Mapping** tab. Alternatively, select **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**.

4.8 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** and select the **Park Slots** tab. Alternatively, select **Tools | Preferences-Configure | Park Slots**.
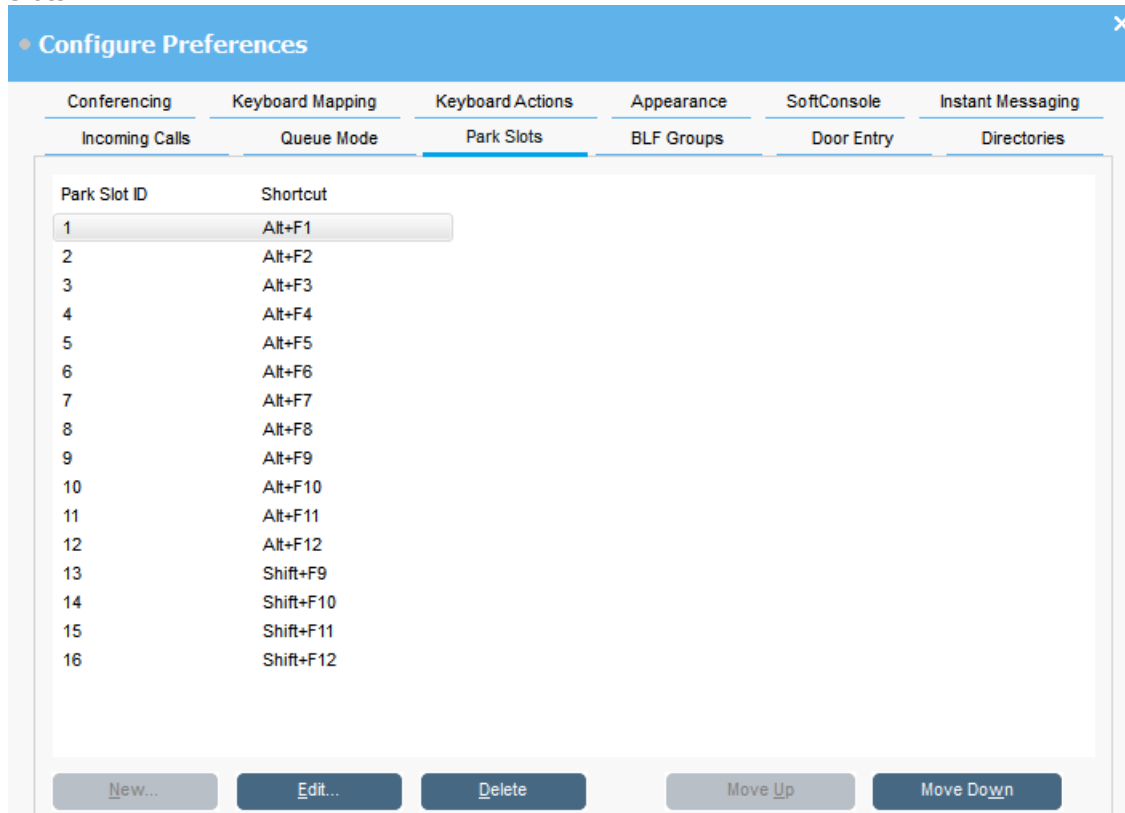
- **New**
  Allows a new button to be added up to a maximum of 16 buttons. See the section Configuring Park Slots 62 .

- **Edit**
  Allows you to change the park slot ID of the current selected button. See the section Configuring Park Slots 62 .

- **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.

4.8.1 Configuring Park Slots

From the Park Slots tab 61 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.

  - If a more private park slot is required, configure the Park ID using text characters. Call can then only be parked and unparked using an application park slot button set to the same text and not using a telephone.

- **Short Cut**
  A keyboard short cut that enables the operator to park or unpark a call into a specific park slot. The short cuts can also be edited through the Keyboard Mapping 60 menu.
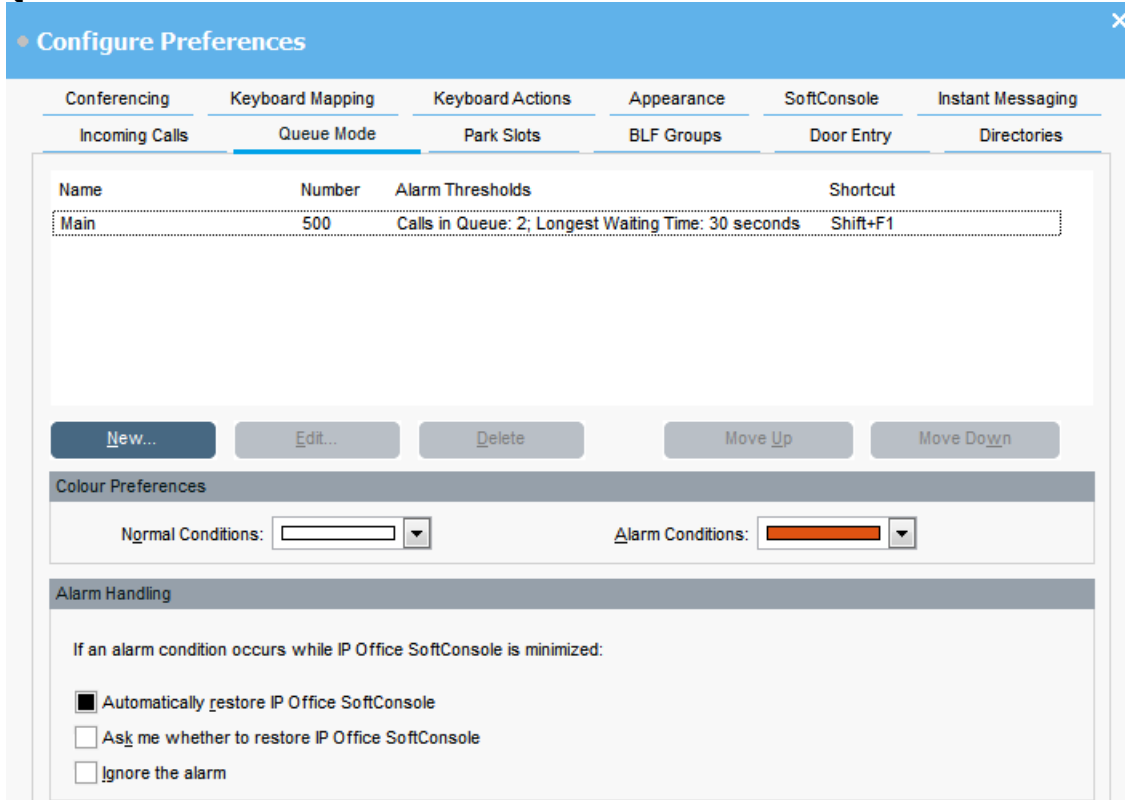
4.9 Queue Mode Tab

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.

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** and select the **Queue Mode** tab. Alternatively, select **Tools | Preferences-Configure | Queue Mode**.

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 transfer 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. See Configuring Queues 64.

   - **Edit**
     Change the current selected queues settings. See Configuring Queues 64.

   - **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 colors used by the queue for normal and alarm conditions.

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**

4.9.1 Configuring Queues

When you select Edit or Create from the Queue Mode tab 63 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.

- **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.

4.10 SoftConsole Tab

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

To view the console configuration tab:

1. Click ✎ **Preferences** and select the **SoftConsole** tab. Alternatively, select **Tools | Preferences-Configure | SoftConsole**.
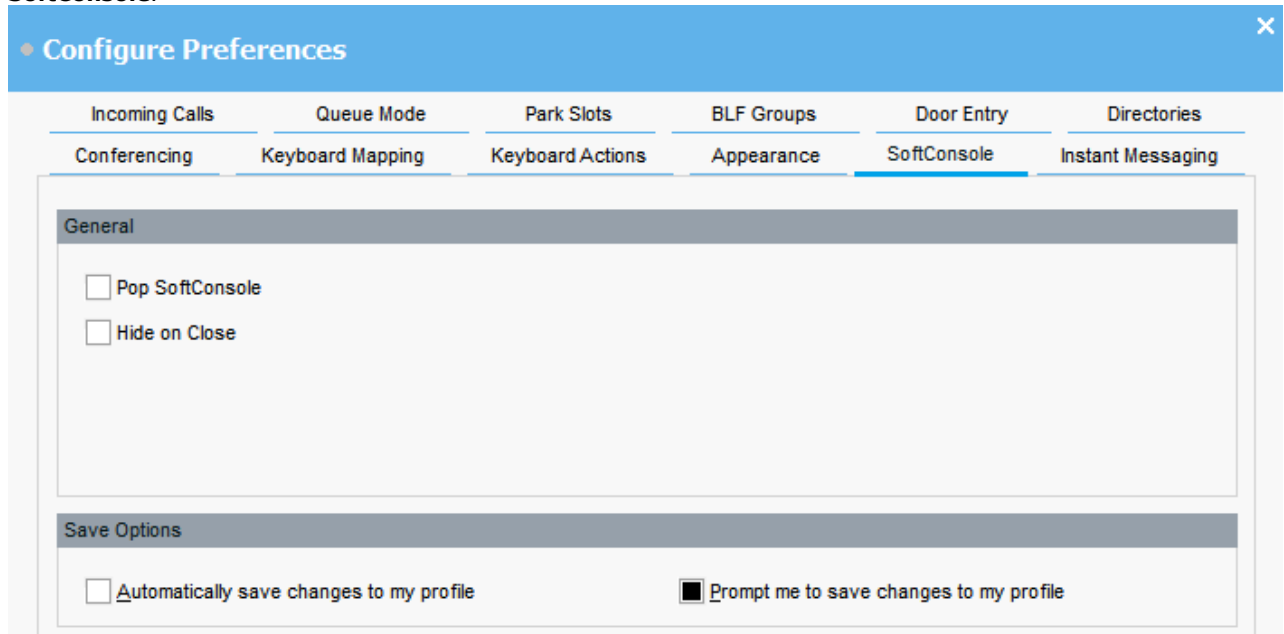
2. Select the general options required:

   - **Pop SoftConsole**
     If selected, when an incoming call is received, the console is brought to the front of any other applications that are running.

   - **Hide on Close**
     This option minimizes the console to the system tray in the Windows Taskbar when you close the application rather than exiting the application. You can still close the console by clicking on the 🗔 icon in the system tray and selecting **Exit**.

3. Select the save mode required for profile changes 68ᐟ:

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

   - **Prompt me to Save Changes to My Profile**
     In this mode, when you close the console, it prompts you whether to save or abandon any changes.

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4.11 Instant Messaging

You can use the console to send instant messages to other users, see [Instant Messaging](#) 34ꀃ. In order to do that, the console uses the one-X Portal for IP Office server if available.

To configure instant messaging:

1. Click ✎ **Preferences** and select the **Instant Messaging** tab. Alternatively, select **Tools | Preferences-Configure | Instant Messaging**.
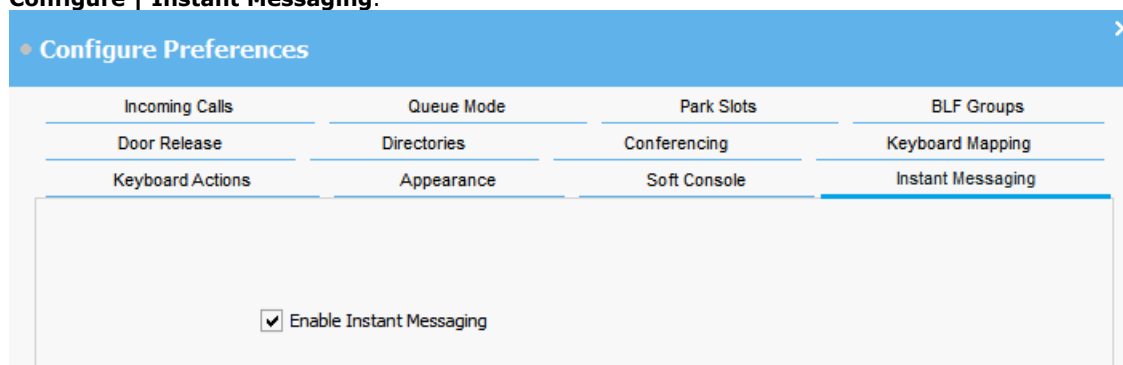
- **Enable Instant Messaging**
  Select this option to enable console instant messaging. Until enabled *IM Disconnected* is displayed in the console's status bar.

2. Click **OK**.

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Chapter 5. Templates/Profiles

5. Templates/Profiles

When you first login, you select one of the default console templates. Whilst using the console, you can change various settings and also change the appearance of the screen. You can save those changes as a personal profile.

The current profile or template that you are using is shown in the console's status bar 17.

- If you want to change if the Held Calls and BLF panels to be hidden or shown, you need to be logged in to the console as the Administrator. See Administrator Mode 69.

To load a profile:
1. When logging in 10, click **Expand** and select the profile required.

To manually save your current profile changes:
1. Click **File** and select **Save Profile**.

To save your current changes as a new profile:
1. Click **File** and select **Save Profile As**.

2. Enter a new file name.

3. Click **OK**. The new profile is saved and the console status bar shows the new profile name.

To automatically save profile changes:
When exiting the console, it will normally prompt you whether to save you profile changes. You can configure the console to automatically save the changes every time.

1. Click ✎ **Preferences - Configure | Soft Console**. Alternatively, click **Tools | Preferences-Configure | Soft Console**.

2. In the **Save Options** section, select **Automatically Save Changes to My Profile**.

3. Click **OK**.

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5.1 Administrator Mode

IP Office 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. See <u>Keyboard Actions Tab</u> 59ᐢ.

- Create and edit templates.

- Remove or display the BLF, Held Calls and Park Slots panels.

To start the console in Administrator Mode:

1. At the login screen enter Administrator and the administrator password.

2. IP Office 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 the console in Administrator mode as above.

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**.

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5.2 Editing a Profile

You can only edit a user's profile if you are in administrator mode.

To change a user's profile:

1. During login, select the profile you want to edit.

2. Login as the administrator 69 .

3. Make changes as required. In administrator modem the **View** menu options for **Busy Lamp Fields**, **Held Calls** and **Park Slots** are available to hide or show those panels in addition to the normal view options.

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

5.3 Using Templates

You can use templates to create a user's profile. There are three default templates 71 installed. Templates can only be created and edited if you are logged in in administrative mode 69 .

To create a new template:

1. Log in 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 the required default profile: *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**.

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5.4 Default Templates

There are 3 default templates installed with the console:

	AdminTemplate1	AdminTemplate2	AdminTemplate3
Menu bar	✔	✔	✔
Tool bar	✔	✔	✔
Call Details	✔	✔	✔
Directory panel	✔	✔	✔
Queue panel	✔	✔	✔
Held calls panel	✔	✔	–
BLF panel	✔	–	–
Park slots panel	✔	✔	–

If a profile is created using Admin Template 3 the user cannot see the Call History 13 .

Chapter 6. Appendix

6. Appendix
6.1 Short Cut Keys

The sections below show the default short cut keys. These can all be adjusted through console configuration menus, see Keyboard Mapping 60 .

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 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

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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 text message to selected user:** Ctrl+M

- **Instant message selected user:** Ctrl+I

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

6.2 Toolbar Buttons

Main Toolbar

The main toolbar can be shown or hidden by using the Toolbar option in the **View** menu.

- 🔑 **Login** 10
- 💾 **Save Profile** 68
- ⌗➹ **Make Call** 21
- 📞 **Answer Call** 20
- ☎ **Hold Current Call** 25
- ⤆ **Transfer** 23
- ⤇ **Transfer Complete** 23
- ⤨ **Reattempt Transfer** 23
- ⏚⏚⏚ **Conference Held Calls** 29

- 📞 **Hang Up Current Call**
- 🔊 **Page** 35
- 🔴 **Record Call** 34
- ⇕ **Compact View** 12
- ⌗ **Dial Pad** 22
- 1️⃣ **Conference Room 1** 30
- 2️⃣ **Conference Room 2** 30
- 🔧 **Preferences - Configure** 52

Directory Buttons

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

- ⌗➹ **Call the selected entry**
  Make a call to the selected directory entry.

- ☑ **Edit the selected entry**
  Edit the properties of the selected directory entry. See Editing Directory Entry Properties 40.

- 🔍 **View Directory Items**
  Use the directory panel to view directory entries.

- 🔍 **View Active Conferences**
  Use the directory panel to view conferences being hosted by the telephone system.

- 👤 **Show/Hide user entries**
  Show or hide user telephone system users in the directory panel.

- 👥 **Show/Hide group entries**
  Show or hide telephone system hunt groups in the directory panel.

- 🗗 **Show/Hide directory entries**
  Show or hide telephone numbers from the telephone system directory, local console directory and or Outlook.

  - You can select which directories are included, see Directories Tab 57.

  - You can edit the local console directory, see Incoming Calls Tab 48.

Held Call Panel Buttons

- 📞 **Answer the selected held call**

- 📞 **Answer the longest held call**

- ⏚⏚⏚ **Conference the held calls**

- ⤆ **Transfer the selected held call**

6.3 Trouble Shooting

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

There is an interval of several seconds after IP Office SoftConsole has been started that the operator cannot use these features. During this interval, the **Directory Entry Properties** and **Group Service Status** forms will display a **Close** button, rather than the **OK** and **Cancel** buttons. 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 57⟩, a Microsoft Outlook warning screen might appear when an operator is opening IP Office 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 IP Office SoftConsole to retrieve Outlook contacts. For more information, refer to the Microsoft Support web site.

Directory Does Not Show Outlook Contacts

This feature requires Outlook to be running with Administrator privileges. Contact your PC support if necessary.

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.

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Chapter 7.
Document History

7. Document History

Date	Issue	Change Summary
25th May 2016	20e	• Update for Release 10.0.

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