



IP Office

SoftConsole Users Guide

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Introduction

Overview of SoftConsole

Key Features of SoftConsole are:

- PC based operator console.
- Simple keyboard operation.
- Large display for incoming calls and extension status information.
- Bar graphs give a visual display of queued calls.
- Visual display of the status of extensions.
- Up to 16 call parking areas.

SoftConsole combines all the elements needed to make your business communications successful. This success depends upon people and their ability to communicate quickly, efficiently and effectively.

- **Enhanced Call Handling**
The PC based SoftConsole is designed to benefit your business through improved Operator service. Scripts can be installed giving the operator information about the incoming call.
- **Ease-of-Use**
SoftConsole is designed to be easy to use. Its look and feel will appeal to experienced and novice operators alike.

Note: This manual has been written assuming:

- Voicemail is installed on the IP Office.
- SoftConsole is operating with the Default settings as supplied with AdminTemplate1.

Getting Started

1. From the Windows **Start** Button, select **Programs**.
2. Highlight **IP Office** then click **SoftConsole**.

When a SoftConsole session is started a Login Form shows containing operator profiles.

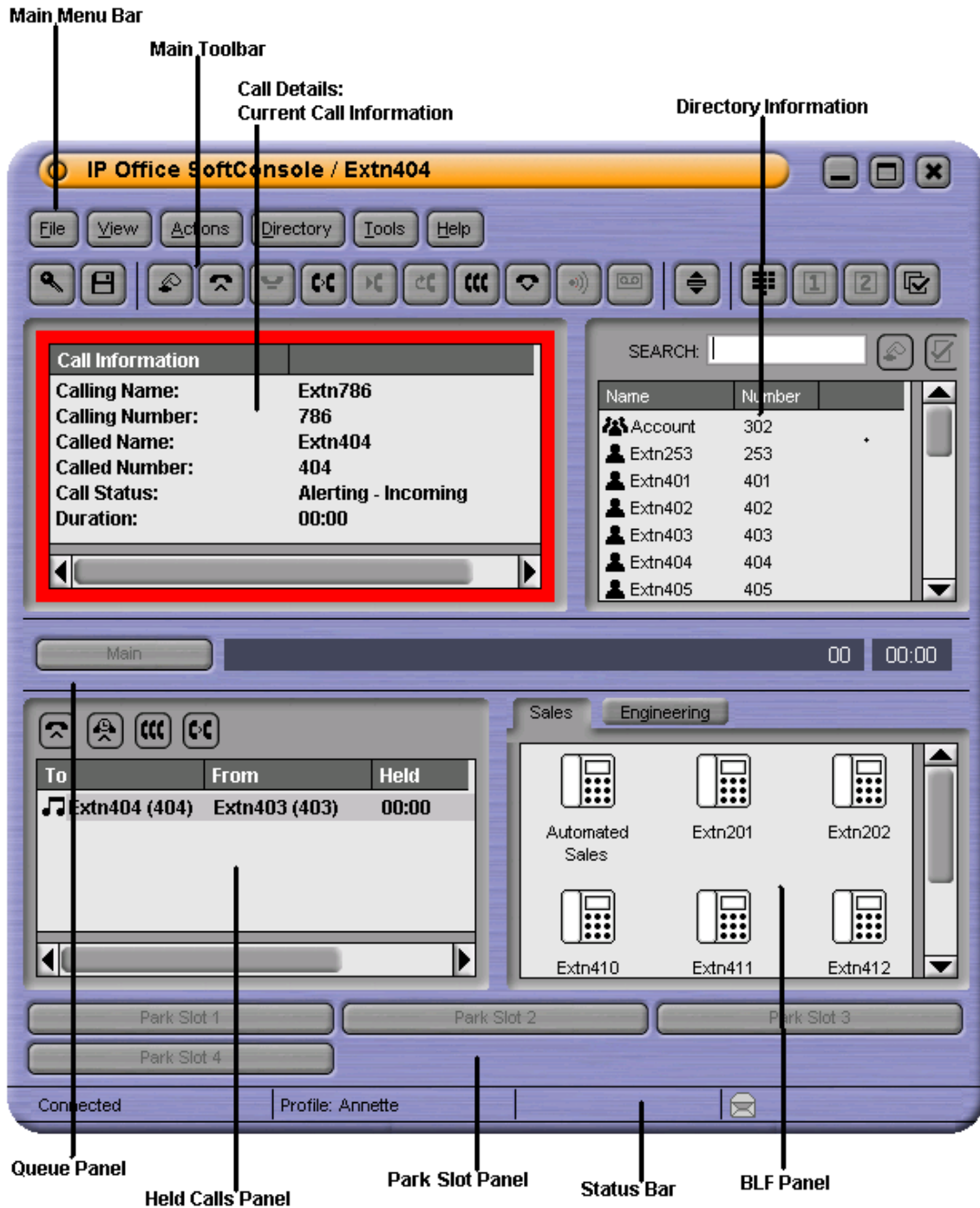
1. Select the desired profile.
Each Operator has their own profile. The profile contains information on the configuration preferences and connection to the telephone system. The chosen profile is the default profile the next time SoftConsole is started.
2. Enter your user name & password.
3. Click OK.

Note: If directory access to Microsoft Outlook contacts folder has been selected in the [directories configuration form](#), a Microsoft Outlook warning screen might appear. If the warning screen appears:

1. Select the **Allow access for** checkbox, and then click an amount of time in the list.
2. Click **Yes**. Yes should always be selected to allow SoftConsole to retrieve Outlook contacts.

Refer to the [Login Form](#) section for more details.

Main Window



The SoftConsole main screen is divided into the following areas:

- **Main Menu Bar**: Commands & actions are available through menus. Some items are only accessible when the right conditions occur e.g. when a call is received.
- **Toolbars**: The toolbars provide short cuts for options that are frequently used.
- **Call Details Panel**: The panel contains a side-by-side display of current call information. The panel on the left shows details of the current call. The panel on the right shows the directory, individual extension details or details of a consultation call. It can also show a script file and conferencing information.
- **Queue Panel**: The Queue panel displays graphical information on the status of calls held in queues.
- **Held Calls Panel**: All calls held at the operator station appear as a list in the Held Calls Panel.
- **BLF Panel**: (Busy Lamp Field Panel) Icons indicate the status of selected users. Tabs indicate different groups of BLF icons, depending on how the BLF details are configured.
- **Park Slot Panel**: The panel contains up to 16 Park Slots with specific Park ID.
- **Status Bar**: Shows current status of the system. The bar is divided into four sections that display:
 - The current connection status
 - The current Profile name
 - Information messages, e.g. alarm conditions.
 - The number of new Voicemail messages for the operator. Double click in this area to call the operator's Voicemail system. This is only available if Voicemail is active for the operator.

Main Menu Bar

- **File:**
Changes to the Profile can be saved, Login with a different profile or exit the SoftConsole application.
- **View:**
Through the View menu it is possible to check which language is currently selected, change the display state of SoftConsole and control the Toolbar.
- **Actions:**
Specific functions used to handle calls. The menu items will only be enabled at the appropriate time.
- **Directory:**
Options to view the Directory Entry properties for a selected directory, search the call details panel, export the directory and amend setup details through the [configuration](#) form.
- **Tools:**
This menu gives access to Dial Pad, Door Release, Send Email, View Conference Rooms, Call Voicemail and configure the application.
- **Help:**
Access to the help system and details about Avaya IP Office SoftConsole.

Call Details Panel

The Call Details panel contains a side-by-side display of current call information. A slider positioned between the two subpanels allows the operator to adjust the size of the panels as required.

The panel on the left contains details about the current call.

- **Calling Name:** The System Directory Name associated with the Calling Number. *If the Calling Number is "WITHHELD" then neither the Calling Number nor the Calling Name information is displayed.* If there is no association between the Calling Party Number and a Directory Name the Calling Name information is not displayed.
- **Calling Number:** The telephone number of the Call Originator. (The telephone number and associated name will be presented if available). If the Calling Number is "Withheld" then neither the Calling Number nor the Calling Name information is displayed.
- **Called Name:** The System User Name or Hunt Group Name associated with the Called Number.
- **Called Number:** The extension number the incoming call has been routed to by the 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.

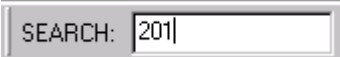







Call Status	Default Border Color
Alerting - Incoming	Red
Alerting - Outgoing	Red
Connected	Green
Dialing	Green
Held	Blue
Returned Calls	Yellow
Idle	Black

- **Call Duration:** The length of time that the call has been in the state as indicated by the Call Status.
- **Notes:** This area displays notes or information about the call i.e. when a call has been returned as there was no answer from the extension it was transferred to. If [annotation](#) is attached to the call, details are shown in the Notes area.









The panel on the right displays information about:

- Directory entries.
- Single Directory entry details
- Details about a consultation call
- A script file when a script file has been configured for either the calling or called number. For example, an operator may be answering calls on behalf of more than one company. To ensure the call is answered with the correct company name a script file can be created with the company name details. The script file is displayed whenever a call is received for that company.

The toolbar in the panel allows the operator to:

-  **Search Directory.** Enter a name or number. When a directory entry match is found the properties specific to the entry are displayed.
-  Call the selected directory entry .
-  View the [directory properties](#) for the selected entry.
-  View Directory Items.
-  [View Active Conferences.](#)
-  Show/Hide User Entries.
-  Show/Hide Group Entries.
-  Show/Hide Directory Entries.

A double click on a Directory entry displays details of the entry. Double click again to view the Directory Properties.

Property	Value
 Name:	Extn227
 Number:	227
 Busy Status:	Busy
 Do Not Disturb Status:	Off
 Login Status:	Logged In
Group Status:	
 Main	In Group
Absent Message:	Back soon
 New Voice Mail Messages:	1
Forwarding Status:	
 Forward Unconditional:	207 (Busy)
Forward On No Answer:	Off
Forward On Busy:	Off
Follow Me:	Off
Forward Hunt Group Calls:	Off

Directory Entry Forms

The SoftConsole Directory Entry Properties forms allow the operator to examine details about the selected directory entry. In some cases, the operator can edit the information and change the user's status. The form displayed depends upon the directory entry type.

- IP Office User - [Directory Entry Properties Form](#).
- Group Entries - [Group Service Status Form](#).
- Non IP Office user - [External Directory Entry Properties](#).

Directory Entry Properties Form

The properties of an IP Office user are shown in the Directory Entry Properties.

- **User Name:** Cannot be changed.
- **Extension:** Cannot be changed.
- **Full Name:** Shows the user's full name. Cannot be changed.
- **Logged In:** This check box indicates the user's logged in state. The operator cannot change this option.
- **Do Not Disturb:** Shows whether the user is in the Do Not Disturb state or not. The operator can change the user's status.
- **Bar Outgoing Calls:** This check box allows the operator to control whether the user can make outgoing calls.
- **[Forwarding Button](#):** Clicking on this button will open a dialog box that allows the operator to view or change the forwarding status of the directory entry.
- **Group Status:** A list of the Hunt groups that the user belongs. If the group is checked then the user is 'in group'. The operator can alter the group status of a group member i.e. from being 'in group' to 'out of group'

Forwarding Status Form

The form allows the operator to view and change the forwarding status of an extension.

- **Follow Me:** Take calls from another extension.

Destination: The extension to receive the calls.

- **Forward Unconditional:** Forward all calls
(To forward all Hunt Group calls select the option Forward Hunt Group Calls and enter the destination extension in this section).

Destination: The extension to receive the calls.

- **Forward on Busy:** Forward calls when the phone is busy.
Forward on No Answer: Forward calls when the extension is not answered.

Destination: The extension to receive calls when the phone is busy or not answered.

- **Forward Hunt Group Calls:** Forward all Hunt Group calls. Select the option Forward Unconditional and enter the destination extension.

Note: If the options Follow Me, Forward Unconditional or Forward on Busy are selected a destination extension number MUST be entered. Changes cannot be saved unless a destination extension is entered.

External Directory Entry Form

If the selected directory entry is not an IP Office user, then the External Directory Entry Properties form is shown. No details can be changed by the operator.

- **Name:** the name associated with the Phone Number.
- **Extension:** the extension number for the user.
- **Phone Number:** the phone number for the user.
- **Mobile Number:** the mobile number for the user.
- **Fax Number:** the fax number for the user.
- **Email Address:** the Email address for the user.

Group Service Status

When the properties of a group is selected then the Group Service Status is shown.

- **Group Name:** The name of the group who's properties are being viewed.
- **Service Status:** A Group's Service status can be either **In Service** or **Out of Service**. The operator can bring a group into service or take it out of service by clicking the corresponding button.

BLF Panel

The Busy Lamp Field (BLF) Panel displays icons to indicate the status of selected users. The BLF panel provides information on:

- Unread 'User' Voicemail messages.



Smith (1) The user has **Unread Voicemail Messages** if there is a yellow envelope in the left corner of the icon. The number of messages appear in brackets after the BLF name, in this case there are 2 unread messages.

- The Extension/User status e.g. if the user is busy, calls are being forwarded, or Do Not Disturb is active.



The user is **Busy** if there is a red circle with a white cross in the upper left corner of the icon.



The user has **Forward Unconditional** active if there is a green circle with a white arrow in the upper right corner of the icon. If the mouse cursor is positioned over the icon details of the forward destination will show.



The user has **Do Not Disturb** active if there is a blue circle with a white cross in the lower right corner of the icon.

If the cursor is placed over an icon the status information will show. The details shown are the users name, extension number, status and the number of new messages. If the user is not logged in then the status will show as Logged Out. If the user is Logged In then the extension/user status will be shown e.g. idle.

Icons can be displayed on separate tabs and used as a Speed Dial. To use a BLF Icon as a Speed Dial:

1. Right click the BLF Icon.

2. Select the option Call.

Or

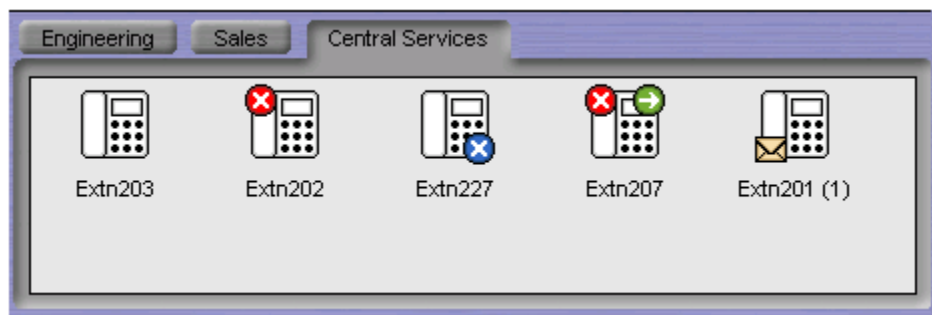
1. Highlight the BLF Icon.

2. Press **Ctrl+Alt+C**

Or

1. Double click the BLF Icon.

BLF Panel Views



To change the view

- Right click in the BLF Panel and select **View** from the pop-up menu. Select the view type required.
Or
- Use the Keyboard Codes as shown in brackets.
 - Large Icons (**Ctrl+Alt+G**)
 - Small Icons (**Ctrl+Alt+S**)
 - List Icons (**Ctrl+Alt+I**)
 - Details (**Ctrl+Alt+D**)

To re-arrange the Icons:

- Right click in the BLF Panel and select **Arrange** from the pop-up menu. Select the way you want to arrange the icons.
Or
- Use the Keyboard Codes as shown in brackets.
 - Name Order (**Ctrl+Alt+N**)
 - Number Order (**Ctrl+Alt+M**)
 - Status Order (**Ctrl+Alt+U**)
 - Horizontally (**Ctrl+Alt+H**) - Available in small icons or large icons view.
 - Vertically (**Ctrl+Alt+V**) - Available in small icons or large icons view.

Members can be added to a BLF group by double clicking within the [BLF panel](#). New BLF groups can be created and BLF members can also be added through the [BLF Configuration form](#).

Add Members to a BLF Group

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

To add member from the Main window:


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 Member dialog box appears.
4. Enter the User's Name and the extension number.
5. Click **OK** to return to the BLF panel.

Note: BLF Members can also be added by:

- Click within the BLF Panel and press **Ctrl+Alt+B** to show the New BLF Member dialog box. Enter the members 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 dialog. Add members as required. Click **OK** to return to the BLF Panel.

Views

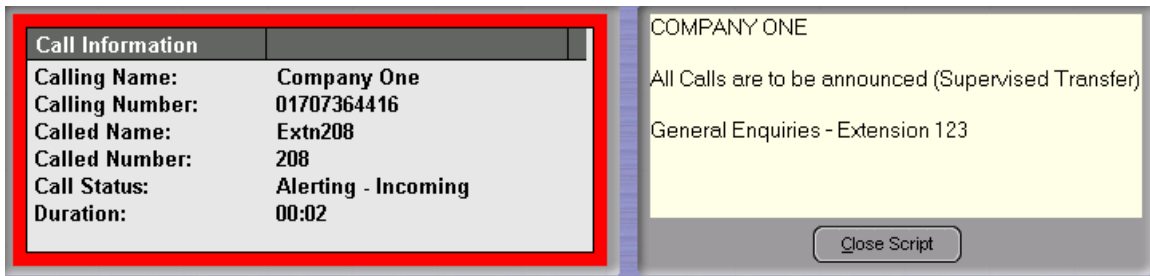
Any profile can view SoftConsole in either Compact View or Normal View. Compact View only contains Toolbars, Call Details and Queue Panels. To toggle between the views:

- Click the Compact View button. 
Or
- From the **View** menu click **Compact View**.
Or
- Press **Home**


Call Handling

Incoming Call Handling

When an incoming call is received the Call Details Panel is outlined in red and displays the information about the call. If a [script](#) file is associated with incoming call number the script is shown in the right call panel.



To answer the call.


- Click the Answer Call button. 
- **Or**
- From the **Actions** menu, select **Answer Call**.
- **Or**
- Press **Enter**.
- **Or**
- Pick up the handset if using a conventional telephone.
- **Or**
- Double click in the Call Details Panel.

When a call is answered the caller information is shown in green.

Enter the extension number or User Name the caller requires in the Call Details directory panel. SoftConsole will search for a match. Once a valid entry is identified details appear on the screen.

Note If a script is shown click on the **Close Script** button or press **Enter**. The Search Directory field will become available.

To transfer the incoming caller to an extension:

- Click the **Transfer Call** button. 
Or
- From the **Actions** menu, select **Transfer Call**
Or
- Press F2 for an immediate transfer ([Unsupervised Transfer](#))
Or
- Press F12 to talk the user before completing the transfer ([Supervised transfer](#)).
Or
- Drag and drop the call information onto the directory entry. (Click on any call information details in the left pane and drag to a directory entry in the right pane).

If the extension is busy the call can be put on hold against the extension number by pressing **Ctrl+B**. The caller is on hold against the extension for 15 seconds or until the destination extension becomes free. The call is automatically presented back to the operator indicating why it has been returned i.e. timeout or that the extension is free.

Note: The hold time against an extension is controlled by the telephone system. Consult your System Administrator for details on how to configure this option.

Transfer a call without answering.

If the operator recognizes a calling name or number it is possible to transfer the incoming call without answering it.

To transfer a call without answering

1. Enter the destination extension number in the Search field.
2. Transfer the call as described in the previous section.

Scripts

A script can be associated with an incoming calling number or an outgoing called number. The script gives the operator information relevant to the calling number e.g. the company name and specific instructions.

When an operator handles calls for more than one company the ability to answer incoming calls with the correct company name is essential. The use of a script will help the operator to do this.

A script is text saved as a .TXT or .RTF file and associated with the incoming calling number from the [Incoming Call Handling](#) configuration form.

Reclaim Calls


If a call is transferred to the incorrect internal extension, user's Voicemail, Park Slot or placed the call on Hold, the Reclaim Call command can be used to return the call to SoftConsole.

To reclaim the **last call** handled

- From the **Actions** menu select **Reclaim Call**
Or
- Press **F6**.

Transfer a Call (Unsupervised)

A call can be transferred to a user without the call being verbally accepted first. Enter the extension number or user name in the search section of the Directory Panel. Details of the single directory entry are shown. If the extension is indicated as free transfer the call by:

- Click the Transfer Call Button. 
Or
- From the **Actions** Menu select **Transfer Call**.
Or
- Press **F2**
Or
- Drag & drop the call onto the extension within the Directory panel
Or
- Drag & drop the call onto the required BLF.

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

If the call is not answered and Voicemail is turned on the call is transferred to user's Voicemail. If Voicemail is not turned on the call rings the transfer number until answered.

Note: The SoftConsole operator be can configured to have unanswered calls returned to the SoftConsole. Consult your System Administrator for details on how to configure this option. When a call is returned, **(NoAns)** is shown in the Current Call Information box. The SoftConsole operator can answer the call and [reattempt](#) the transfer, transfer the call to the user's [Voicemail](#) or select another transfer number.


Transfer a Call (Supervised)

When the operator needs to consult a user to verify that they are free to currently accept a call, a consultation call is needed. During a supervised transfer the original call information is shown on the left side of the call details area with a blue border. The consultation call details are shown on the right side of the call details area with a green border.


Original Call		Consultation Call	
Calling Name:	Extension 203	Calling Name:	Extension 201
Calling Number:	203	Calling Number:	201
Called Name:	Extension 201	Called Name:	Extension 206
Called Number:	201	Called Number:	206
Call Status:	Held	Call Status:	Connected
Duration:	00:24	Duration:	00:18

To make a Consultation Call


1. Enter the extension number or User Name in the search field of the Call Details Directory Panel and check if the destination extension is free.
2. If the extension is free make a call to the extension by one of the following methods.

- Click the **New Call**  button. **Or**
- From the **Actions** menu select **New Call**. **Or**
- Pressing **F12**.
The progress of the outgoing call can be heard.

3. Once the call is answered and the incoming call verbally accepted then connect the caller by one of the following methods.

- Click the **Transfer Complete**  button. **Or**
- From the **Actions** menu select **Transfer Complete**. **Or**
- Press **Ctrl+T**.

4. If however the user cannot receive the incoming call at this time finish the consultation call by one of the following methods.

- Click the **Hang Up**  button. **Or**
- From the **Actions** menu select **Hang Up**. **Or**
- Press **End**.

Note: When making a consultation call press **Ctrl+A** to toggle between the two calls.

Transfer a call to Voicemail

If an incoming caller wants to leave a message for a user then the caller can be directly transferred to the user's Voicemail.


To transfer a call to Voicemail:

- From the **Actions** menu select **Voicemail Transfer**.
Enter the extension number into the Transfer to Voicemail dialog box.
Click OK.
Or
- Press **F3**
Enter the extension number into the Transfer to Voicemail dialog box.
Click OK.
Or
- Locate the extension number in the directory panel.
Press **F3** to transfer the caller to Voicemail.

Making an outgoing call

To make a call

1. Enter the internal or external number or User Name in the Call Details Search field

2. Click the **New Call** button .
Or
From the **Actions** menu select **New Call**.
Or

Press **F12**.


The Current Call Information area shows details of the outgoing call.

Using Hold

All calls that the operator places on hold can only be retrieved by the operator. There are three types of hold:

- Hold.
- Hold call against extension number.
- Hold call and auto-answer next alerting call.

To place a call on hold.

- Click the Hold button  .
Or
- From the **Actions** menu select **Hold Call**.
Or
- Press **F4**.

The call is put on hold and shown in the Held Calls Panel. The time a call is held in the Held Calls Panel is controlled by the telephone system. Consult your System Administrator for details on how to configure this option.

Note: If the operator hangs up on a call while there is a call on hold, the operator will automatically be connected to the call.

Held Calls Panel

The Held Call Panel contains a list of all held calls at the operators station. All calls are shown in a listing detailing the following information:

- Calling Party Information.
- Called Party Information.
- The amount of time the call is on hold.
- The Call Annotation for the call, if applicable.

The operator can sort the list by clicking the corresponding column header. Clicking a row in the list selects the call so the operator can answer or transfer the call.

The toolbar at the top of the panel allows the following actions.



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



Answer Longest Held Call: Answers the call that has been on hold for the longest time.



Conference with Held Calls: Creates a conference with the current call and all calls on hold.



Transfer Held Call: Transfers a selected held call (unsupervised transfer)

Note: Right click in the Held Calls panel causes a pop-up menu to be displayed. It offers the same options as the toolbar buttons.

Hold against a busy extension

If an extension is busy a call can be placed on hold against the busy extension number by pressing **Ctrl+B**. The caller is put on hold until timeout happens, or until the destination extension becomes free. The call is automatically presented back to the operator indicating why it is being returned i.e. timeout or that the extension is free. The operator can [reattempt](#) the transfer or answer the call.

Note: The hold time against an extension is 45 seconds.

Hold Current Call and Auto Answer Next Call

To place the current call on hold and automatically answer another call that arrives within one second press **F7**. If an operator is a member of a queue which is getting congested, then the operator can use this feature to reassure callers that their calls will be handled shortly, .


Reattempt Transfer

The reattempt transfer action is used to retransfer a returned call to the original transfer extension. The call details panel has a yellow border when a call is returned.

A call can be retransferred when:

- A call was held against a busy extension. The extension becomes free so the call is returned to the operator.
- A call was transferred to a free extension. The call is returned to the operator as the call was not answered and Voicemail was not available.

To reattempt a transfer:

- Click the **Reattempt Transfer** button .
Or
- From the **Action** menu select **Reattempt Transfer**.
Or
- Press **Ctrl+R**.

If this feature is not available refer to the section on [trouble shooting](#).

Parking a Call

It is sometimes necessary to temporarily "park" a call to handle some other tasks (receive a new call) or deal with an interruption. An example of Parking is where an incoming caller needs to speak to someone urgently but they cannot be found. The call can be parked in slot "1", and the specific user [paged](#) to [pick up](#) the call on "1". Calls will remain parked for a specific length of time before being returned to the operator. Consult your System Administrator for details on how to configure this option.

SoftConsole provides parking slots for 16 calls, all with specific Park ID. When a call is parked in one of the park slots, the button label provides information about the call. When a park slot is vacant, the button label shows the park slot ID. All operators can see when the call is picked up or ended. Calls parked by the operator can be collected by anyone.

- To park a call:**
 When the call is active in the Current Call Information panel, click a vacant Park Slot within the Park Slot panel to park the call. The parked call is highlighted in red and displays information regarding the call e.g. the source number of call.
- To Unpark a Call:**
 When a call is parked in a Park Slot, click the relevant Park Slot Button to unpark the call.

If a secure a parking slot is required for private use, [configure the Park ID](#) with text so a call cannot be unparked using a short code.

Default Short Cut Codes used to Park or Unpark a call.

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

Collect a parked call

When an operator parks a call the call can be collected by anyone. An example of Parking is where a user has to be paged to make a call. An incoming caller needs to speak to someone urgently but they cannot be found. The call can be parked in slot "1", and the specific user paged to pick up the call on "1". The user can pick up the call from any phone using a short code, e.g. ***38*1#** (1 being the slot number).

To pick up a parked call from an IP Office telephone.

- Dial a default short code, e.g. ***38*N#** (**N** representing the Park ID).

Or

To pick up a parked call through Phone Manager.

- Park Slots with the same ID as the Park Slots within SoftConsole will show parked calls. The Caller information will be displayed if it is available

Or

A telephone with DSS Keys can be programmed with a Park Slot Number against a key. The DSS key can then be used to pickup and park calls. See your System Administrator for more information.

Working with Queues

Calls to a Hunt Group are held in a queue when all available members of the hunt group are busy. You can be a member of a Hunt Group, for example "Main", and automatically be presented with calls to this group.

The name of the Hunt Group is displayed in the Calling Name field in the Call Details, Current Call Information Panel. You can also monitor the number of calls being held in a queue for a particular Hunt Group. For details on creating, modifying and deleting a Queue refer to the section called [Configuring a queue](#).

Monitor a Queue

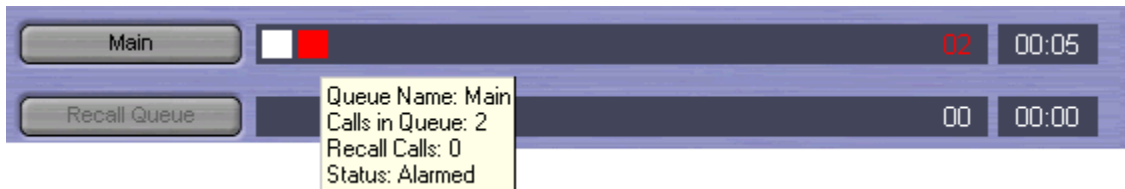
The Queue Mode Panel displays up to eight Queues. They indicate the number of calls currently queued for a specific Hunt Group.

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

The longest length of time a call has been 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 will be displayed in white if the longest wait time alarm threshold has not been exceeded. The time will change to being amber if the longest wait time is exceeded.

When the mouse pointer is moved over an active Queue Call bar the Queue Name, number of calls in the queue, number of Recall calls and the queue status (normal or alarmed) is displayed.



Answer a Queued Call

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 displayed in the Calling Name field. You can answer the call in the normal way.

If you are not a member of a Hunt group you are able to answer queued calls. To answer a call click on the Queue name button, the first call in the queue is presented to the operator with the Hunt Group name displayed in the Calling Name field. Answer the call in the normal way.

Conference Calls

Within SoftConsole calls can be conferenced when held or a conference can be created through the two [conference rooms](#).

Conference Held Calls.

An operator can conference calls that are in the Held Panel. All calls in the Held Panel will be conferenced.

1. Place all the user's to be conferenced on hold.

2. To conference all the calls on hold press the Conference with Held Calls button.



3. To remove the operator from the conference call, click the Hang Up Call button.





Note: New users can be added to the conference by selecting **Add to Conference** from the **Action** menu.

Conference Room

The Main Toolbar contains two buttons that represent the two conferences rooms. For the Conference buttons to be available the [conference room names](#) need to have been set up.

To create a conference:

1. Click either Conference Room 1  or Conference Room 2 . A conference window will appear. The name of the conference room will appear on the tab e.g. **Conference Room 1 / Alpha**. If the conference room is not currently in use the window will be blank. If in use then the current members of the conference will be shown.
2. In the Conference Description area type the subject of the conference. This will only show on the conference room form and is optional.
3. In the Conference Host area type the name of the person who has requested the conference. This will be shown in the View conferences area of the directory panel.
4. Enter the users for the conference by:
 - Click the **Add Users** button and select users from the Directory list.

Or

- Drag and drop BLFs from the BLF Panel into the window.

Note: if a user is added by mistake they can be deleted by right click on the BLF, select the option Remove.

5. If Voicemail Pro is present users can be invited by clicking on the **Invite** button. The BLF icons will show with a blue outline and each delegate will be automatically invited to the conference. When the delegates phone rings they are invited to join the conference by pressing 1, decline the invitation by pressing 2 or that they are unavailable by pressing 3. The BLF's will change automatically to indicate the status of the call.

Or

If Voicemail Pro is not present invite the users manually. Double click a delegates icon to call the user and invite them to the conference.

- If they accept click on 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, right click on the BLF and change the status accordingly to record the delegates response.

The invited delegates status is represented by an icon in the Conference Room window.



Once a conference is in progress new delegates can be manually invited into the conference by:

- The operator calls the delegate and adds them to the conference using the **Add to conference** action.
- Calls to the operator can be added to the conference by using the **Add to conference** action.

To change the view:


- Right click in the Conference Room Window and select **View** from the pop-up menu. Select the view type required.
 - Large Icons
 - Small Icons
 - List Icons
 - Details

To rearrange the Icons:

- Right click in the Conference Room Window and select **Arrange** from the pop-up menu. Select the way to arrange the icons.
 - Name order
 - Number order
 - Status order.

To change the status of a delegate:

- Right click on the Icon
- Select **Change Status**
- Select the status i.e. Not invited, Invited, Joined, Declined, or Unavailable.

Note: To view all active conferences, including conferences created by Power Conferencing click  within the Call Details Directory panel.

Features

The Actions menu contains commands for:

- [Reclaim Call](#): Return the last handled call to SoftConsole.
- **Alternate Calls**: Toggle between a consultation call and original incoming call.
- **Answer Call**: Answer the incoming call.
- [Annotate](#): Associate a text annotation with a call.
- [New Call](#): Start a new call.
- [Conference](#): Conference the current call with all calls that are on hold.
- **Hang up**: Disconnect from the current call.
- [Hold](#): Place the current call on hold.
- [Hold Call and Auto-Answer Next Alerting Call](#): Place the current call on hold and if another call alerts the operator's station within one second, then that call is automatically answered.
- [Hold Against](#): Place the current call on hold against a specific extension number.
- [Intrude](#): Intrude upon a user who is active on a call.
- [Page](#): Activate the paging feature.
- [Record Call](#): Turns on call recording.
- [Send Message](#): Allows the operator to send a message to a user that is visible either on the user's telephone display or through phone manager.
- [Transfer Call](#): Transfer the current call.
- [Transfer Complete](#): Complete a supervised transfer.
- [Reattempt Transfer](#): Transfer a call that is returned to the operator
- [Voicemail Transfer](#): Transfer a call to a user's Voicemail.
- [Add to Conference](#): Transfer a call into a Held calls conference
- [Add to Conference Room 1](#): Add a call to Conference room 1.
- [Add to Conference Room 2](#): Add a call to Conference room 2.
- [Pick Queue](#): Pick up a call from a Queue.
- [Park](#): Park a call. Lists the available park slots.
- [Unpark](#): Retrieve a parked call. Lists the park slots containing a parked call.

The Tools Menu contains commands for:

- [Dial Pad](#): Show the pop up Dial Pad form.
- [Door Release](#): Open controlled doors without leaving the desk.
- [Send Email](#): Send a message to a user via the email system.
- **Call Voicemail**: Connect to the Voicemail for the user that is logged into SoftConsole.
- **Conference Room**: Enter a conference room

Annotate

Text can be associated with a call. This feature is also known as 'Tagging' a call. Alpha & Numeric characters can be used but not commas. By default the length of a message is up to 16 characters. The [Administrator](#) can specify the maximum length of call notes.

To Annotate a call:

- From the **Actions** menu select **Annotate Call**
Or
Press **F11**
- Type the required details and click **OK**.


The Current Call Information panel shows with a notes field containing the text that was entered. When the call is transferred the message is displayed at the extension if the equipment can display text.

Note: The annotation is also shown on the originator's phone if the equipment is capable of displaying text and the call is internal.

Intrude

This is only available if the operator has permission to intrude and the other internal parties have given permission to allow intrude to happen. Consult your System Administrator for details on how to configure this option.

To intrude upon a user who is active on a call:

1. Locate the user in the directory panel.
2. From the **Actions** menu select **Intrude**.
Or
Press **F9**.
3. Speak to the User.
4. When finished press the Hang Up button. 
Or
From the **Actions** menu select **Hang Up**
Or
Press the **End** button.

Page

The SoftConsole operator can broadcast a message to a specific group of people. For example, an incoming caller needs to speak to someone urgently but they cannot be found. The call can be parked and then a message broadcast for the user to pick up the call.

To broadcast a message:

1. Click the Page button.



Or

From the **Actions** menu select **Page**.

Or

Press **F10**

2. Select the group to broadcast to and click OK.
3. Speak the message

4. To end the Page click the Hang Up button.



Or

From the **Actions** menu select **Hang Up**

Or


Press the **End** button.

Record Call


- Refer to your local regulations in relation to recording calls.
If Advice of Call Recording (AOCR) is required, speak to your system administrator.

Current calls can be recorded, either a complete call or just part of the call. Recordings will stop when a call is put on Hold or is disconnected. When Conference calls are being recorded the recording will be stopped when another caller is added to the conference.

To record the current call conversation:

- Click the Record Call button 
Or
- From the **Actions** menu select **Record Call**
Or
- Press **F5**
The conversation is recorded into the operators own voice mailbox.

To finish recording

- click the Record Call Button 
Or
- From the **Actions** menu select **Record Call**
Or
- Press **F5**

Note: Recordings are only supported when VoiceMail Pro is installed.

Send Message

This option allows the operator to send a message to a user. The message is visible either on the user's telephone display or through Phone Manager Pro. Messages can be received whilst the user is on a call.

To send a message:

1. Locate the user in the directory.
2. From the **Action** menu select **Send Message**.
Or
Press **Ctrl+M**
The user's extension number field will automatically be completed from information showing in the directory.
3. Enter the message and press **OK**.

If this feature is not available refer to the section on [trouble shooting](#).

Note By default the maximum length of a message is 16 characters. The length is controlled by the [call note size](#).


Reattempt Transfer

The reattempt transfer action is used to retransfer a returned call to the original transfer extension. The call details panel has a yellow border when a call is returned.

A call can be retransferred when:

- A call was held against a busy extension. The extension becomes free so the call is returned to the operator.
- A call was transferred to a free extension. The call is returned to the operator as the call was not answered and Voicemail was not available.

To reattempt a transfer:

- Click the **Reattempt Transfer** button .
Or
- From the **Action** menu select **Reattempt Transfer**.
Or
- Press **Ctrl+R**.

If this feature is not available refer to the section on [trouble shooting](#).

Using Dial Pad

The operator can use the Dial Pad to dial a phone number from the application.

To start Dial Pad:

- Click the Dial Pad Button .
Or
- From the **Tools** menu select **Dial Pad**.
Or
- Press **Shift+Ctrl+F3**.



The required telephone number can be entered into the 'Number to Dial' field by using the dial characters on the Dial Pad or from the keyboard. Notes for the call can be entered in the Call Notes area.

When completed click the **Dial** button to start the call.

Door Release

The Door Release allows the SoftConsole operator to open controlled doors, without leaving the desk. Two doors can be controlled by the SoftConsole operator. The doors will be released for 15 seconds by default.

To open a door using SoftConsole:

1. From the **Tools** menu select **Door Release**.
2. Click the required door name to release the door.
Note: Before the option Door Release is available to the SoftConsole Operator, the doors need to be configured.

Configuration

1. From the **Tools** menu select **Options** and click **Door Entry**
2. Enter a name for Door 1. The name entered is shown when the option Door Release is selected. Access to the Entry Code field is prevented as the Entry Code for door one is set to 1.
3. Enter a name for Door 2 if required.
4. Click **OK**.

Send Email

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

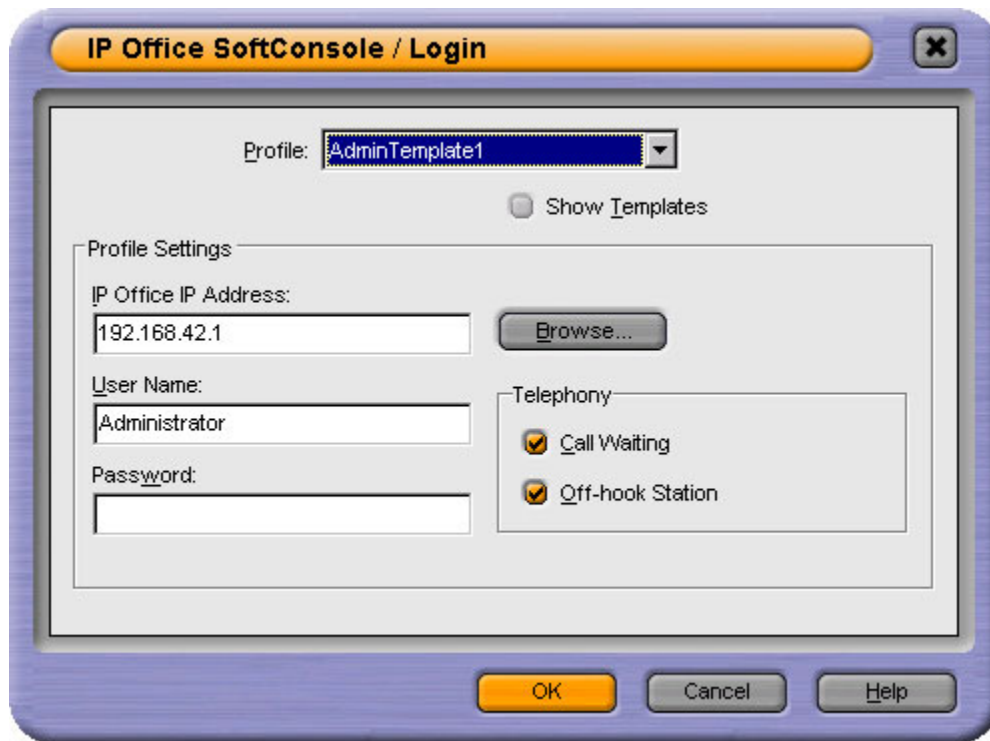
To send an email message:

1. From the **Tools** menu select **Send Email**.
Or
Press **Ctrl+E**.

The email message form will appear. Complete the details as required and send in the usual way.

Administration

Login Form



The screenshot shows a window titled "IP Office SoftConsole / Login". At the top, there is a dropdown menu for "Profile:" with "AdminTemplate1" selected. Below this is a checkbox labeled "Show Templates" which is currently unchecked. The main area is divided into two sections: "Profile Settings" and "Telephony".

Profile Settings:

- IP Office IP Address:** A text box containing "192.168.42.1" and a "Browse..." button.
- User Name:** A text box containing "Administrator".
- Password:** An empty text box.

Telephony:

- Call Waiting
- Off-hook Station

At the bottom of the window are three buttons: "OK" (highlighted in orange), "Cancel", and "Help".

When the Login form has been completed click the **OK** button. The Login screen will continue to be displayed until the operator has successfully logged in. During this time the message "Login in progress, please wait...." is displayed at the bottom of the screen. If the Login fails the message "Login unsuccessful. Please try again" is shown. There are several reasons why a Login attempt may fail.

- The incorrect IP Office IP Address
- An invalid user name and/or password has been entered
- There may be network problems
- The operator is not logged into the telephone.

The form needs to be completed with the following information.

- **Profile**
A drop down list of the available profiles. The chosen profile is the default profile the next time SoftConsole is started.
- **Show Templates**
Indicates whether templates are included in the Profile drop down menu. To view both Templates and Profiles in the drop down list select this option. The list includes predefined templates.
- **IP Office IP Address**
The IP Address of the IP Office system. Click the [Browse](#) button to select another IP Office system.
- **User Name**
The user name that is used to log in to the IP Office system
- **Password**
The password associated with the user name. Each character of the password is displayed as an asterisk (*)
- **Call Waiting**
The Call Waiting feature provides a Call Waiting Tone when the operator is on a call and another call is presented. When the existing call is dropped the new call is immediately presented to the operator.
- **Off-hook Station**
If selected the Off-hook Station feature is turned on for the operator during the current session. This feature is typically used by operators using the hands free features of the telephone. SoftConsole will control the operation of the telephone.

IP Office Control Units

If there is more than one IP Office system available the operator can select the unit to be connected. A listing shows the Unit name, IP Address and version.

To select a Unit:

1. Highlight the unit in the list
2. Click OK.

If the required IP Office system is not listed contact your System Administrator.

Administrator Functionality

When in Administrator mode the operator can:

- Change and create templates. There are predefined templates supplied. New templates can also be created.
 1. Select a predefined template at the Login screen.
 2. Login as Administrator
 3. Make changes as required.
 4. Save the new template from the **File** menu, **Save Template as** option.
 5. Enter a name for the template and click OK.
- Control which panels are viewed. From the View menu you are able to display or remove the following panels.
 - BLF Panel.
 - Held Calls Panel.
 - Park Slots Panel.
- Change the [Administrator password](#). We recommended that the user name Administrator is not left with the default password.
- Edit the profile of other users.
 1. Select the user's profile to edit
 2. Login as Administrator.
 3. Make changes as required
 4. Save the profile from the **File** menu, **Save Profile** option.
- Specify the maximum length of [Call Notes](#).

Note: When logged in as an Administrator there is no access to the telephony functions.

To Login as Administrator with the default settings:

1. At the Login screen enter:
User name: **Administrator**
Password: **password** (case sensitive)

Change Administrator Password

When the application is first installed the password for Administrator is **password**. It is advisable to change the password once the application is installed.

To change the password for the first time:

1. Login as:

User name: **Administrator**

Password: **password** (case sensitive)

1. From the **File** menu select **Change Administrator Password**.
2. Enter the old Password (password) which will show as asterisks.
3. Enter the new password. Make a note of the new password being careful regarding capitalization as the password is case sensitive. The password will appear as asterisks.
4. Enter the new password again to confirm and click OK.

Configuration Form

The SoftConsole Configuration Form allows the operator to configure the application and to set individual preferences. The configuration options are divided into sections on a series of tabbed pages.

- [Incoming Calls](#)
- [Queue Mode](#)
- [Park Slots](#)
- [BLF Groups](#)
- [Door Entry](#)
- [Directories](#)
- [Conferencing](#)
- [Keyboard Mapping](#)
- [Keyboard Actions](#)
- [Appearance](#)
- [Save](#)

To view the configuration screen:

1. From the **Tools** Menu select **Options**.
2. Select the configuration group to amend.

Or

1. Click the Configure SoftConsole Options button.



Incoming Calls Configuration

The IP Office SoftConsole Local Directory shows details of external numbers and the associated name.

For example, if a lot of calls are received from a certain calling number the details can be entered into the Local Directory. Whenever a call is received from the specified number, the call information will show the name associated with the number. You can also associate specific script & media files against a calling name or number.

The list shows the SoftConsole Local Directory entries. It contains four columns:

- **Name** - The name associated with the number.
- **Number** - The telephone number (or short code) that is dialed when the Directory Entry is selected.
- **Script File** - The path to the txt/rtf file to be displayed when a call is made to the number entered in the Number field.
- **Media File** - The path to the .WAV, .AVI, etc. file that is played when a call is received from the number entered.

From this form the operator can:

- [New](#): Add new details
- [Edit](#) Change details for existing entries.
- **Delete**: Entries can be removed by selecting the entry then click the Delete button.
- **Open Directory File**: Choose the directory to be used. To open a different directory click the **Open Directory File** button. By default the directory files are stored within a folder called Data in the SoftConsole Folder as .CSV files. Select the required directory and click the **Open** button.

Default call handling allows the operator to specify what actions happen when either a call presented or a number being called is not associated with an entry in the Local Directory. If a [Script file](#) or Media file is required, click the relevant **Browse** button to find and select the file. The file name appears in the corresponding field.

Local Directory List

From the Incoming Calls tab you can create [new](#) entries and [edit](#) the properties of an existing entry.

Create a New Entry.

Click the **New** button within the Incoming Calls form. The New IP Office SoftConsole Local Directory Entry form will show.

- **Name:**
The Name that you wish to be associated with the Directory Entry.
- **Number:**
The telephone number that will be dialed when the Directory entry is selected.
- **Script File:**
The name of a text file (.txt or .rtf) to be displayed when a call is presented to the operator with the number entered in the Number field.
 - **Browse for Script File:**
Use the Browse button to find and select a script file on your PC or network.
- **Media File:**
The name of the .WAV files to be played when a call is presented to the operator.
 - **Browse for Media File:**
Use the Browse button to find and select a .WAV file on your PC or network.

Edit an Existing Entry


Select the entry to be changed and then click on the **Edit** button within the Incoming Calls form. The Edit IP Office SoftConsole Local Directory Entry form will appear. The form is populated with the existing details. Amend any of the details and then click OK to save the changes. For information on the specific fields within the form, see the section [Create a New Entry](#).

Configuring a Queue.

A queue monitor can be configured for a specific Hunt Group. The Hunt Group needs to be created on the System with Queuing enabled. Refer to your System Administrator for more details.

SoftConsole provides you with the ability to configure and monitor up to eight queues. One of the Queues is configured as a [Recall Queue](#).

To configure a queue:

- Click the SoftConsole Options button  then view the **Queue Mode** tab.
Or
- From the **Tools** menu select **Options**, then view the **Queue Mode** tab.

The list of Queues contains:

- **Name:** Name of the Hunt Group
- **Number:** Extension number assigned to the Hunt Group
- **Alarm Thresholds:** Shows the alarm settings for the number of calls in the queue and the longest waiting time alarm setting.
- **Short Cut:** The keyboard code used to answer calls from the Hunt Group.

The buttons allow you to:

- **Create a [new](#) queue:** Click this button to add a queue to the list.
- **[Edit](#) an existing queue:** Click this button to edit the properties of the selected queue.
- **Delete a queue:** Click this button to delete the selected queue.
- **Move Up:** Moves the selected queue up one position in the list.
- **Move Down:** Moves the selected queue down one position in the list.

Color Preferences:

By default any queued calls which are under the alarm thresholds are shown as a white box in the Bar Graph. Calls that are above the alarm threshold are in orange. In this area you can select your color preferences for Normal and Alarm conditions. Any changes made to the conditions are applied to all the queues.

Alarm Handling

This section allows the operator to specify how SoftConsole will behave if an alarm condition occurs whilst the application is minimized.

- **Automatically Restore:** The SoftConsole application will pop up automatically if an alarm condition occurs.
- **Prompt:** The SoftConsole application will display a dialog box that allows the operator to either maximize the application, or ignore the alarm condition.
- **Ignore:** The SoftConsole application will ignore alarm conditions that occur while the application is minimized.

Recall Queue

A Recall Queue will show calls that have been queued, answered and then transferred, but the call has not been answered. Instead of the call being returned to the end of the original queue the call is placed into a new queue called Recall.

New/Edit Queue

When you select to Edit or Create from the [Queue Configuration](#) tab, the Queue Properties dialog will show. If you have selected an existing queue the details of the queue are entered in the form.

- **Queue Name:** A drop down 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 will occur 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 on the **Browse for Media File** button and locate the file.

When all the details are entered, click the OK button to save them.

Park Slots Configuration

The Park Slots tab allows the operator to select which Park Slots are accessible through the SoftConsole application. Each Park Slot has a unique ID. These IDs are system wide and available to everyone on the system. This is very useful if you need to park a call that anyone can [pick up](#).

The form contains a list of the configured park slots shown in two columns, Park Slot ID and Short cut. The Park Slots can be configured using the buttons:

- **[New](#)**
Clicking this button opens a dialog box that allows the operator to add a park slot to the list. There are a maximum of 16 slots available.
- **[Edit](#)**
Allows the operator to change the settings for the selected park slot i.e. change the assigned short cut key.
- **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 one position in the list.

Note: Performing a right click on the Park Slot List View causes a pop up menu to be displayed. The menu contains the same options as those accessible by the buttons on the form.

New/Edit Park Slot

The New Park Slot / Edit Park Slot form allows the operator to add a Park Slot to the list of monitored park slots, or to edit the short cut assigned to an existing Park Slot. Each Park Slot has a unique ID. By default these are 1-16.

- **Park Slot ID:** Each ID can be alphanumeric (contain letters and numbers) but only numeric ID's can be accessed via a Short Code. Therefore the use of alpha characters secures the Parking slot from being picked up from a normal phone. The entered name may not include spaces.
- **Short Cut:** A keyboard Short Cut which enables the operator to park or unpark a call into a specific Park Slot.

BLF Groups Configuration

Busy Lamp Field (BLF) provides Extension/User Status Information at a glance, color coded for ease of use. By creating groups (for example by department or location) you can logically view the status of a group.

The buttons on the BLF Groups configuration form allow the operator to [create or edit a BLF Group](#)

Create a New BLF Group

From the BLF Groups Configuration tab click the **New** button. A dialog box appears.

To create a BLF group:

1. Enter a unique BLF Group name
2. Select the required member from the 'Members not in BLF Group' list, then click the **Add** button. The details show in the 'BLF Group Members' list on the right side of the dialog box.
 - **Note:** To add more than one member at a time, hold down the Ctrl key and click on each member. When all members are selected, click the add button.
3. When all members for a group are added, click the **OK** button to return to the BLF Groups configuration form. The new BLF Group is added to the end of the list.
 - The BLF tab sheets in the BLF Panel on the [Main Form](#) 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 the **Move Up** or **Move Down** buttons to move the group up or down one position in the list.
4. Click **OK** to return to the Main Window.

Note: To edit a group from the main screen, right click in a blank area of the BLF Panel to display a pop-up menu. Select New, then click BLF Group to view the New BLF Group dialog box.

Edit a BLF Group

From the BLF Groups Configuration tab select the BLF group to be changed, then click the **Edit** button. An Edit BLF Properties dialog box shows. Remove or Add members as required and then click the **OK** button to return to the BLF Groups configuration screen. Click **OK** to return to the Main window.

Note: To edit a group from the main screen, right click on a BLF Group and select properties from the pop-up menu to view the configuration form for the selected BLF Group.

Directories Configuration

This form is split into two sections.

- **Directory Access:** Allows you to select which directories you have available.
- **Display Fields for Search Results:** Allows you to select the details you want to include in Directory Entry Details.

Directory Access









- **IP Office SoftConsole Local Directory**
If selected there is access to SoftConsole Local Directory as setup on the [Incoming Calls](#) tab.
- **IP Office Directory**
If selected SoftConsole provides access to the directory entries maintained by the IP Office switch.
- **Microsoft Outlook Contacts Folder**
If selected SoftConsole provides access to the Microsoft Outlook Contacts list. This option is only available if Microsoft Outlook is installed. An Outlook icon shows in the directory list with the phone number.

Note: If directory access to Microsoft Outlook contacts folder is selected a Microsoft Outlook warning screen might appear. If the warning screen appears:

1. Select the **Allow access for** checkbox, and then click an amount of time in the list.
2. Click **Yes**. Yes should always be selected to allow SoftConsole to retrieve Outlook contacts.

Display Fields for Search Results





The check boxes allow the operator to control which directory fields are included in the Directory Entry Details for a directory entry. If the option is select then the details are shown in the search results.

Property	Value
 Name:	Extn227
 Number:	227
 Busy Status:	Busy
 Do Not Disturb Status:	Off
 Login Status:	Logged In
Group Status:	
 Main	In Group
Absent Message:	Back soon
 New Voice Mail Messages:	1
Forwarding Status:	
 Forward Unconditional:	207 (Busy)
Forward On No Answer:	Off
Forward On Busy:	Off
Follow Me:	Off
Forward Hunt Group Calls:	Off

- **Name:** This check box is always selected and cannot be changed.
- **Extension:** This check box is always selected and cannot be changed.
- **Busy Status:** Busy or Idle.
- **Do Not Disturb Status** Off or On.
- **Forwarding Status:** When selected the status of the types of forwarding are shown. e.g. Forward Unconditional, Forward on No Answer, Forward on Busy, Follow Me, and Forward Hunt Group Calls.
- **Forwarding Destination:** Only available if Forwarding Status selected. When selected the extension number that will receive the forwarded calls shows.
- **Forwarding Destination Status.** Only available if Forwarding Status selected. The status of the extension number receiving the calls.
- **Login Status.** Logged In or Logged Out.
- **Group Status.** When this check box is selected the groups that the extension belongs in will show either In Group or Out of Group.
- **Absent Message.** The message will be displayed if set in Phone Manager.
- **New Voicemail Message.** Indicates the number of unread messages against the extension number.
- **Phone Number.**


The following search results are only available when looking at the properties of Outlook extension numbers.

- **Mobile Number.**
- **Fax Number.**
- **Email Address.**

Property	Value
 Name:	Extn207
 Phone Number:	207
 Mobile Number:	
 Fax Number:	2082
Email Address:	bob@mycompany.com

Conferencing Configuration



Click the  button and view the Conferencing tab. This option allows the operator to set up the names of the two conference rooms. The name will appear on the telephone displays of users in the conference room. The names can contain up to 10 characters and must be unique.

Keyboard Mapping Configuration

All short cut keys can be changed.

1. From the **Tools** Menu select **Options** then click **Keyboard Mapping**.
2. Find the function for which you want to amend the short cut key and click the existing short cut key.
3. Click the arrow at the end of the row and select the short cut you require from the list.
Note: If you select a key combination which is used for another function a warning will appear indicating that the short cut is assigned to more that one function. Select a key combination that is not assigned to a function.

To restore the [default settings](#):

1. From the **Tools** Menu select **Options** then click **Keyboard Mapping**.
2. Click the **Reset All** button at the bottom right of the screen.

Keyboard Actions Configuration

The Keyboard Actions Configuration tab allows the operator to specify the default action when alphabetic or numeric characters are entered.

Default Action for Alphabetic Keystrokes

There are two actions that can occur when an alphabetic character is entered while a call is active.:

- **Begin Directory Search**
Input is directed to the Directory Search field when the user types an alphabetic character.
- **Open Call Annotation Window**
The Call Annotation Form is presented when the user types an alphabetic character if the cursor is not in the Directory Search field.

Default Action for Numeric Keystrokes

There are two actions that can occur when a numeric character is entered while a call is active.:

- **Begin Directory Search**
Input be directed to the Directory Search field when the user types a numeric character.
- **Open Pop-up Dial Pad**
The Pop-up Dial Pad Form appears when a user enters a numeric character if the cursor is not in the Directory Search field.

Call Notes

This option is only available when in [administrator mode](#).

You can specify the maximum length of the Call Notes by the number of characters. The length specified also applies to the length of messages sent with the Send Message feature. By default the number of characters is set to 16 but the value can be changed to suit the display capabilities of the installed telephones.

Appearance Configuration

The operator is able to change the appearance of SoftConsole using the Appearance Option.

- **General:**
 - **Font:** Select the style from the drop down list.
- **Skin:**
 - **Apply Custom Skin:** To change the look of SoftConsole click in the check box.
 - **Browse Button:** Search for the Skin to apply.
- **Call Status:** The Call Information panel frame is color coded to indicate the status of a call. The operator can configure the colors for the status of the call by selecting a new color from the drop down list.
 - **Idle:** The default system color is **Black**.
 - **Alerting - Incoming:** The default system color is **Red**.
 - **Alerting - Outgoing:** The default system color is **Red**.
 - **Connected:** The default system color is **Green**.
 - **Held:** The default system color is **Blue**.
 - **Return Call:** The default system color is **Yellow**.

Save Configuration

When changes to the configuration of SoftConsole are made there are two ways to save changes to the Profile.

- **Automatically Save Changes to My Profile:** When this option is selected any changes made to the profile of the operator are saved when the session is ended.
- **Prompt me to Save Changes to My Profile:** When the session is ended a dialog box will appear. The operator is able to save any changes to their profile or abandon the changes.

Appendix

Cannot send a message.

Contact your System Administrator. To be able to send a message the operator's extension needs to be configured via Manager to be a System Phone.

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

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

Unanswered calls are not returned to the operator

Contact your System Administrator. For calls to be returned to the operator when they are not answered, the word 'eConsole' (case sensitive) needs to be added in the SourceNumbers tab to the operator's extension in Manager.

Microsoft Outlook Warning Screen appears at Login.

Cause:

If directory access to Microsoft Outlook contacts folder has been selected in the [directories configuration form](#), a Microsoft Outlook warning screen might appear when an operator is opening SoftConsole or using the option 'Send Email'. If the warning screen appears:

1. Select the **Allow access for** checkbox, and then click an amount of time in the list.
2. Click **Yes**. Yes should always be selected to allow SoftConsole to retrieve Outlook contacts.

For more information refer to the Microsoft Support web site.

How to export Directories.

Local Directory entries can be exported in a .CSV file format.

To export the operators Local Directory

1. From the **Directory** menu select **Export**
2. Enter a name for the file and click **OK**.

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

How do I delete a Profile.

Profiles can be removed if they are no longer required by:

1. From the **File** menu select **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.

Default Templates

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

Template	Description
AdminTemplate1	Panels showing: Call Details - Call information & Directory Panel, Queue Panel, Held Calls Panel, BLF Panel and Park Slot panel (containing 16 slots)
AdminTemplate2	Panels showing: Call Details - Call information & Directory Panel, Queue Panel, Held Calls Panel, and Park Slot panel (containing 16 slots)
AdminTemplate3	Panels showing: Call Details - Call information & Directory Panel, Queue Panel.

Short Cut Keys

The Default setting for short cut / Hot keys are shown in the table. If you wish to change any setting, print a copy of this table and record the new setting. All functions appear in the category 'All Short Cuts and Hot Keys'. Some functions appear in separate categories as well.




















Note: Press Shift+F1 to view the Help file.










Function	Category	Default Setting	New Setting
Add To Conference		Shift+Ctrl+F10	
Add to Conference Room 1		Shift+Ctrl+F11	
Add to Conference Room 2		Shift+Ctrl+F12	
Alternate Calls		Ctrl+A	
Annotate Calls		F11	
Answer Call		Enter	
Answer Held Call	Held Call	Ctrl+Alt+A	
Answer the Call On Hold for the Longest Time	Held Call	Ctrl+Alt+L	
Arrange BLF Icons by Name	BLF	Ctrl+Alt+N	
Arrange BLF Icons by Number	BLF	Ctrl+Alt+M	
Arrange BLF Icons by Status	BLF	Ctrl+Alt+U	
Arrange BLF Icons Horizontally	BLF	Ctrl+Alt+H	
Arrange BLF Icons Vertically	BLF	Ctrl+Alt+V	
BLF Details View	BLF	Ctrl+Alt+D	
BLF Large Icon View	BLF	Ctrl+Alt+G	
BLF List View	BLF	Ctrl+Alt+I	
BLF Small Icon View	BLF	Ctrl+Alt+S	
Call Selected BLF Group Member	BLF	Ctrl+Alt+C	
Call Selected Directory Entry	Directory	Ctrl+C	
Call Voicemail	Tool	Ctrl+V	
Conference Room 1	Tool	Shift+Ctrl+F4	
Conference Room 2	Tool	Shift+Ctrl+F5	
Conference View	Directory	Ctrl+F	
Conference with Held Calls	Held	F8	
Create New BLF Group	BLF	Ctrl+Alt+R	
Create New BLF Group Member	BLF	Ctrl+Alt+B	
Dial Pad	Tool	Shift+Ctrl+F3	
Directory View	Directory	Ctrl+Y	

Function	Category	Default Setting	New Setting
Display Properties of Selected Entry	Directory	Ctrl+P	
Edit BLF Group/BLF Group Member Properties	BLF	Ctrl+Alt+P	
Hang Up		End	
Hold Call		F4	
Hold the Current Call Against a Busy extension		Ctrl+B	
Hold Call and Auto-Answer the Next Alerting Call		F7	
Intrude		F9	
Make new call		F12	
New Directory Search	Directory	Ctrl+S	
Page		F10	
Park / Unpark Call in Park Slot 1	Park Slots	Alt+F1	
Park / Unpark Call in Park Slot 2	Park Slots	Alt+F2	
Park / Unpark Call in Park Slot 3	Park Slots	Alt+F3	
Park / Unpark Call in Park Slot 4	Park Slots	Alt+F4	
Park / Unpark Call in Park Slot 5	Park Slots	Alt+F5	
Park / Unpark Call in Park Slot 6	Park Slots	Alt+F6	
Park / Unpark Call in Park Slot 7	Park Slots	Alt+F7	
Park / Unpark Call in Park Slot 8	Park Slots	Alt+F8	
Park / Unpark Call in Park Slot 9	Park Slots	Alt+F9	
Park / Unpark Call in Park Slot 10	Park Slots	Alt+F10	
Park / Unpark Call in Park Slot 11	Park Slots	Alt+F11	
Park / Unpark Call in Park Slot 12	Park Slots	Alt+F12	
Park / Unpark Call in Park Slot 13	Park Slots	Shift+F9	
Park / Unpark Call in Park Slot 14	Park Slots	Shift+F10	
Park / Unpark Call in Park Slot 15	Park Slots	Shift+F11	
Park / Unpark Call in Park Slot 16	Park Slots	Shift+F12	
Pickup Call From Queue 1	Queue Mode	Shift+F1	
Pickup Call From Queue 2	Queue Mode	Shift+F2	
Pickup Call From Queue 3	Queue Mode	Shift+F3	
Pickup Call From Queue 4	Queue Mode	Shift+F4	
Pickup Call From Queue 5	Queue Mode	Shift+F5	
Pickup Call From Queue 6	Queue Mode	Shift+F6	

Function	Category	Default Setting	New Setting
Pickup Call From Queue 7	Queue Mode	Shift+F7	
Pickup Call From Queue 8	Queue Mode	Shift+F8	
Reattempt the Transfer of a Returned Call		Ctrl+R	
Reclaim Call		F6	
Record Call		F5	
Release Door 1	Tool	Shift+Ctrl+F1	
Release Door 2	Tool	Shift+Ctrl+F2	
Restore SoftConsole Application	Application	Pause	
Send Email to Selected User	Directory	Ctrl+E	
Send Message to Selected User	Directory	Ctrl+M	
Show/Hide Directory Entries	Directory	Ctrl+D	
Show/Hide Group Entries	Directory	Ctrl+G	
Show/Hide User Entries	Directory	Ctrl+U	
Switch Between Normal View Mode and Compact View Mode.	Application	Home	
Transfer Call		F2	
Transfer Complete		Ctrl+T	
Transfer Held Call	Held Call	Ctrl+Alt+T	
Transfer to Voicemail		F3	

Toolbar Buttons

Main Toolbar	
	Login
	Save Profile
	New Call
	Answer Call
	Hold Call
	Transfer Call
	Transfer Complete
	Reattempt Transfer
	Conference
	Hang up
	Page
	Record Call
	Compact View
	Dial Pad
	Access Conference Room 1
	Access Conference Room 2
	Options
Call Details - Directory Panel	
	Make a call to the selected Directory Entry
	View the Directory Properties for the selected Entry

	View Directory Items
	View Active Conferences
	Show/Hide User Entries
	Show/Hide Group Entries
	Show/Hide Directory Entries
Held Calls Panel	
	Answer the Selected Held Call
	Answer Longest Held Call
	Conference with Held Calls
	Transfer Held Call

Glossary

- DSS Keys** Keys that can be programmed to allow users to see which lines/extensions are busy/free at a glance.
- Hunt Group** A Hunt Group is a group of users created to take specific calls, e.g. "Main" to take incoming calls to the switchboard, "Sales" to sales orders, "Support" to handle help desk calls, etc. To create a Hunt Group, see your System Administrator.
- Profile** A profile contains information on the configuration preferences and connection to the telephone system. Each user can create their own profile
- Template** A template contains a predefined layout and configuration options. Templates can be used to create a user profiles.

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