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Part No. P0936571 02

Business Communications Manager

Attendant Console User Guide

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Preface

Business Communications Manager Attendant Console provides a graphical interface on your Windows-based PC for managing calls in a call center or office.

Text conventions

This guide uses the following text conventions:

angle brackets (< >)	Indicate that you choose the text to enter based on the description inside the brackets. Do not type the brackets when entering the command. Example: If the command syntax is `ping <ip_address>`, you enter `ping 192.32.10.12`
`bold Courier text`	Indicates command names and options and text that you need to enter. Example: Use the `dinfo` command. Example: Enter `show ip {alerts|routes}`.
braces ({})	Indicate required elements in syntax descriptions where there is more than one option. You must choose only one of the options. Do not type the braces when entering the command. Example: If the command syntax is `show ip {alerts|routes}`, you must enter either `show ip alerts` or `show ip routes`, but not both.
brackets ([ ])	Indicate optional elements in syntax descriptions. Do not type the brackets when entering the command. Example: If the command syntax is `show ip interfaces [-alerts]`, you can enter either `show ip interfaces` or `show ip interfaces -alerts`.

ellipsis points (. . .)	Indicate that you repeat the last element of the command as needed. Example: If the command syntax is **`ethernet/2/1`** `[`*`<parameter> <value>`*`]`**`...`**, you enter **`ethernet/2/1`** and as many parameter-value pairs as needed.
italic text	Indicates file and directory names, new terms, book titles, Web addresses, and variables in command syntax descriptions. Where a variable is two or more words, the words are connected by an underscore. Example: If the command syntax is **`show at`** *`<valid_route>`*, *`valid_route`* is one variable and you substitute one value for it.
`plain Courier text`	Indicates command syntax and system output, for example, prompts and system messages. Example: `Set Trap Monitor Filters`
separator (>)	Shows menu paths. Example: Protocols > IP identifies the IP option on the Protocols menu.
vertical line (|)	Separates choices for command keywords and arguments. Enter only one of the choices. Do not type the vertical line when entering the command. Example: If the command syntax is **`show ip`** {**`alerts`**|**`routes`**}, you enter either **`show ip alerts`** or **`show ip routes`**, but not both.

Acronyms

This guide uses the following acronyms (TBD):

AUI	attachment unit interface
BootP	Bootstrap Protocol
BRI	basic rate interface
CSMA/CD	carrier sense multiple access/collision detection

DLCMI	Data Link Control Management Interface
HDLC	High-level Data Link Control
IP	Internet Protocol
ISDN	Integrated Services Digital Network
ISO	International Organization for Standardization
ITU-T	International Telecommunication Union-Telecommunication Standardization Sector (formerly CCITT)
MAC	media access control
MAU	media access unit
MDI-X	medium dependent interface crossover
NBMA	nonbroadcast multi-access
OSPF	Open Shortest Path First
PPP	Point-to-Point Protocol
SMDS	Switched Multimegabit Data Service
SNMP	Simple Network Management Protocol
STP	shielded twisted pair
TPE	twisted pair Ethernet

Chapter 1
Introduction to Attendant Console

Business Communications Manager Attendant Console is an application that provides centralized call management and call activity reporting capability to a business. Attendant Console runs on one or more Pentium® class personal computers (PCs).

You can customize the way Attendant Console is set up to suit your company's call management requirements. A telephone attendant uses a graphical user interface to:

- originate calls
- answer and manage multiple calls
- view a company's name before answering a call
- record, add and change caller information for future use
- quickly access information about a caller
- transfer calls to employees or their voice message mailbox
- send the caller's name to the employee's telephone display
- park calls and page employees
- view information in a Directory about your company's employees such as their extension number, person status and telephone status
- create and print reports showing how incoming calls are handled
- view the status of extensions in the company's Attendant Console system

Components of the Attendant Console

Attendant Console is a client/Business Communications Manager base unit software application that consists of three interrelated components:

- Server component
- Client component
- Reports component

Server component

The Server component communicates with your Business Communications Manager base unit initiating telephone functions such as transferring calls, placing calls on hold and parking calls.

The Server component communicates with one or more Client components. A Client component is on a PC connected via a Local Area Network (LAN).

The Server component receives:

- notification of incoming calls
- information about telephones attached to the Business Communications Manager base unit

The Server component collects and manages call-processing information in a database that can be used for reporting purposes.

Client component

The Client component has an easy-to-use graphical user interface (GUI). The Attendant Console window displays information about incoming callers and includes a Company Directory with employee names, telephone status (such as on-hook, off-hook, Do Not Disturb and Call Forward) and person status (such as None, Not at desk and Out of office). The Directory can be searched from the Attendant window.

Attendant PCs can be either main, assistant, overflow or backup. For more information, refer to "Types of attendant setups" on page 17. Incoming calls can be transferred to an extension, a voice message mailbox or an external number.

You can set up more than one attendant for your company. You can also set up Attendant Console to provide call coverage for assigned groups of employees. In this setup, you are notified of calls to assigned employees and can answer calls when the employees cannot.

Reports component

The Reports component provides information about incoming calls. Reports can help you identify trends and find answers to questions before they become problems.You can request a report from any PC with a Client component and view the report in the Reports window or print it on an attached printer.

Attendant Console features

There are many features and benefits associated with Attendant Console.

PC compatibility

Attendant Console combines telecommunications with personal computing to make the attendant's job easier, faster and more efficient (see Table 1).

Table 1 Attendant Console-PC compatibility.

Use of existing hardware	You do not need to purchase additional dedicated hardware to use the power of Attendant Console. If you have the minimum computer requirements, all you need is the software that lets your computer communicate with the Business Communications Manager base unit.
Multi-tasking	Attendant Console works in a multi-tasking environment. You can use your PC for other tasks such as word processing in addition to attending to calls. You can quickly switch from PC tasks to the Attendant window if there is an incoming call.

Graphical User Interface (GUI)

Attendant Console has a GUI that has sophisticated features but is less complicated than other attendant consoles. You can easily select the buttons to process incoming calls.Very few key strokes are needed for most activities. For example, answering an incoming call and transferring it to an extension usually requires two steps: clicking a Loop button to answer the call and double-clicking the icon beside the called party's name to transfer the call.

The GUI provides you with at-a-glance information about the progress and status of calls. Before you answer a call, you know the caller's telephone number and how long the caller is waiting. If a call transfers back to you, the Attendant Console window immediately displays the status of the call.

The readily available online Help ensures that Attendant Console is easy to learn and use.

Because performing normal attendant functions is faster with a GUI, you can do other tasks while you use Attendant Console.

Advanced software capabilities

Table 2lists some of Attendant Console's advanced software capabilities:

Table 2 Attendant Console’s advanced software capabilities

Visual call announcing and control	When a telephone is busy with a call, an attendant can send caller information to the telephone’s two line display area. The person called can use display buttons to control the call. This prevents important calls from being lost.
Backup attendant	Incoming calls can be quickly and easily transferred to a backup attendant at a different location than the main attendant. This means that a backup attendant does not have to leave their desk to cover for the main attendant.
Overflow attendant	Overflow calls are transferred to an overflow attendant. Consequently, calls are not lost during busy periods.
Reports	You can generate reports that contain information such as the number of incoming calls and who answers the calls. This information shows the calling trends in the business and the performance of the telephone system.
Ability to handle growth	A one-time purchase of Attendant Console is often all that is needed. If you want to add more attendant positions as the company grows, Attendant Console is easily expandable.

Attendant types

You must set up each PC to handle calls either as a main attendant, overflow attendant, backup attendant or assistant attendant. Each attendant type gives you flexibility in responding to calls. This ensures that calls can be handled in a professional and prompt manner. For detailed information about attendant setups, refer to “Types of attendant setups” on page17 .

Chapter 2
Getting started

The installer or System Administrator must set up and check the system before you can use the Attendant Console components. First, make sure you know how to start and quit Attendant Console on your PC. For information on starting the components for the first time, refer to “Initializing and configuring the Client component” on page 16. For information about changing the Attendant Console window settings refer to “Initializing and configuring the Client component” on page 16.

Starting the Client component

To start the Client component and open the Attendant Console window:

1. On the Attendant PC, click **Start** and point to **Programs**, point to **Nortel Networks**, point to Attendant Console and then click **Attendant**.
   The Attendant Console taskbar button appears on the taskbar. The Attendant Console window appears with the Tip of the Day window over it.
2. On the **Tip of the Day** window click the **Close** button.

Minimizing and maximizing the Attendant Console window

You can minimize and maximize the Attendant Console window depending on your needs.

To minimize the Attendant Console window:

1. In the title bar click **Minimize** 🗕
   The Attendant Console window minimizes.

To maximize the Attendant Console window:

1. On the taskbar, click the **Attendant Console** taskbar button.
   The Attendant Console window returns to full screen size.

Quitting the Client component

To quit the Client component:

1. On the **File** menu click **Exit**
   or
   on the title bar click the **Close** box.
   A message appears asking if you want to quit Attendant Console.
2. Click the **Yes** button.

You can also shut down the Client component from the Windows taskbar by right-clicking the **Attendant Console** taskbar button and clicking the **Close** button.

Initializing and configuring the Client component

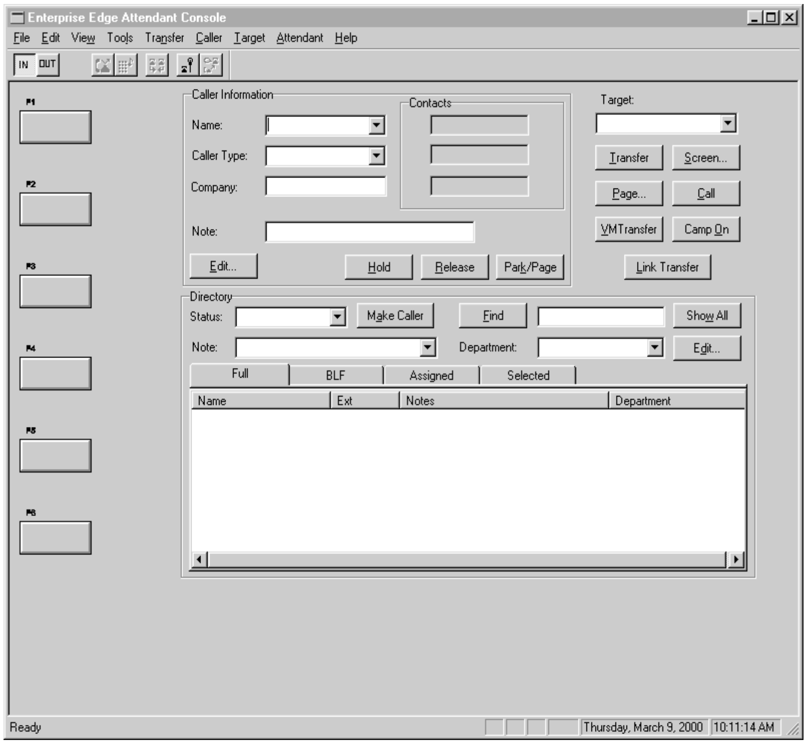
You must set up each PC that has the Client component installed to handle calls either as a full-time main attendant, part-time main attendant, backup attendant, overflow attendant or assistant attendant.

Starting the Client component for the first time

To start and set up the Client component:

1. On the taskbar, click **Start**, point to **Programs**, point to **Attendant Console** and click **Attendant**.
   The Client component starts. The first time the Client component starts after installation, the Enter Attendant Options dialog box appears.
2. In the **Attendant Extension** box type the extension number of the attendant.
3. If the network has more than one Attendant Console Server running, you must enter the Server ID for the Business Communications Manager base unit you want to use in the **Server ID** box. The Server ID refers to the Windows TCP/IP host name of the Server PC. If you do not know the Server ID, ask your System Administrator.
4. Click the **OK** button.
   The Tip of the Day dialog box appears over the Attendant Console window.
5. Click the **Close** button to see the Attendant Console window (see Figure 1).

Figure 1 Attendant Console window


Enterprise Edge Attendant Console
File Edit View Tools Transfer Caller Target Attendant Help
IN OUT
F1
F2
F3
F4
F5
F6
Caller Information
Name:
Caller Type:
Company:
Note:
Contacts
Target:
Transfer
Screen...
Page...
Call
VMTransfer
Camp On
Edit...
Hold
Release
Park/Page
Link Transfer
Directory
Status:
Make Caller
Find
Show All
Note:
Department:
Edit...
Full
BLF
Assigned
Selected
Name
Ext
Notes
Department
Ready
Thursday, March 9, 2000
10:11:14 AM

When the setup is complete, the Directory list displays the Business Communications Manager extensions connected to the Business Communications Manager base unit.

Types of attendant setups

You must set up each PC that has the Client component installed to handle calls either as a main attendant, overflow attendant, backup attendant or assistant attendant.

Full-time main attendant setup

The full-time main attendant setup is intended for a telephone operator that has the Attendant window always visible on their PC. There can be more than one full-time attendant.

Every Client component must have the Server ID and Attendant extension options set for the Client component to function. The Server ID indicates to the Client component where the Server component is located. The Attendant extension setting indicates to the Client component which telephone belongs to the attendant.

The Client component displays the incoming calls to the attendant’s telephone as a yellow Ringing Loop button on the Attendant window. If the attendant’s telephone is programmed to receive all the incoming calls for the company, (that is, as a main attendant), Attendant Console displays the calls.

Before the attendant can receive and make calls, you must set the attendant’s extension number through the Client component. The extension must be a valid extension on the Business Communications Manager system and must be the telephone at the attendant’s desk.

To set or change the attendant's extension number:

1. On the **Tools** menu click **Options**.
   The Options dialog box appears with the Options tab open.
2. In the **Attendant** option, in the **My Extension** box, type the extension number of the attendant's telephone.
3. Click the **OK** button.

Part-time main attendant setup

The part-time main attendant can answer incoming calls and performs tasks on the PC such as word processing.

The difference between the full-time main attendant setup and the part-time main attendant setup is that the part-time setup has additional attendant options selected that allow notification of incoming calls when the attendant component is minimized. Refer to "Full-time main attendant setup" on page17 and "Setting up other attendant features" on pag e20.

Backup attendant setup

A backup attendant is an attendant position that receives calls that are redirected from another attendant position. The backup attendant can at the same time operate as a main attendant, assistant attendant, or any combination of the attendant types.

You must set up Each Attendant PC that is set up to receive incoming calls to redirect the calls to the backup Attendant PC.

➡ **Note:** The system can redirect calls to another Attendant Console attendant or any extension number in the company.

If the attendant needs to leave their position, they can activate the backup attendant position by clicking the Out button on the Attendant window. The Out button diverts calls to the backup attendant. After they click the Out button, the attendant can complete the calls currently in progress on the Attendant window. New calls appear on the absent main attendant's PC and the backup attendant's PC. Although the main attendant is out, the Client component can still process calls, if required.

To set up the backup attendant:

1. On the **Tools** menu click **Options**.
   The Options dialog box appears with the Options tab open.
2. In the **Redirect calls to** option in the **Extension** box, type the backup attendant's extension number.

3 Click the **OK** button.

The main attendant can redirect their calls to the backup attendant by clicking the Out button. The main attendant can click the In button to resume receiving calls at their PC.

Overflow attendant setup

An overflow attendant receives calls that are redirected from another attendant position where there are more incoming calls than Loop buttons. For example, if a main attendant is already handling six incoming calls, the next call is redirected to the overflow attendant until one of the main attendant's six Loop buttons is available.

The overflow attendant can also operate as a main attendant, an assistant attendant or any combination of the attendant types.

After you set up an Attendant PC as the overflow, each Attendant PC that is set up to receive incoming calls must be set up to redirect calls to the overflow Attendant PC whenever overflow conditions exist. You must activate the overflow feature at each Attendant PC.

Note: The system can redirect calls to another Attendant Console attendant or any extension number.

If all the Loop buttons are in use, the Loop overflow icon appears in the Attendant Status Bar and the overflow call goes to the specified extension. For more information on the Loop overflow icon, see "Status Bar" on page 25.

To set the overflow extension:

1. On the **Tools** menu, click **Options**.
   The Options dialog box appears with the Options tab open.
2. In the **Redirect calls to** option, in the **Extension** box, type the overflow attendant's extension number.
3. Select **Call overflow occurs** to redirect calls when all of the main attendant's Loop buttons are busy with calls.
4. Click the **OK** button.

Assistant attendant setup

An assistant attendant provides call coverage for one or more extensions in the system. You can set up an assistant attendant to monitor incoming calls to specific extensions. Set up an assistant attendant if an employee wants an assistant attendant, such as an administrative assistant, to answer the employees' calls.

To set up an assistant attendant:

1. On the **Tools** menu, click **Options**.
   The Options dialog box appears with the Options tab open.
2. In the **My extensio**n box, type the assistant attendant's extension.
3. Click the **OK** button.

To add or remove an assistant attendant's assigned extensions:

1. On the **Tools** menu, click **Options**.
   The Options dialog box appears with the Options tab open.
2. Click the **Assigned** tab.

   To add an extension, click the extension you want in the **All extensions** box and click **>>** to copy it to the **Assigned extensions** list.

   To remove an extension from the Assigned extensions list, click the extension number in the **Assigned extensions** list and click **<<**.

To view an assistant attendant's assigned extensions:

1. On the **Tools** menu, click **Options**.
   The Options dialog box appears with the Options tab open.
2. Click the **Assigned** tab.
3. After you view the extensions, click the **OK** button.

Setting up other attendant features

Call notification

There are two ways Attendant Console can notify an attendant of incoming calls:

- If an attendant keeps the Attendant Console window minimized and works on other tasks, they are notified of incoming calls with a Call Notification dialog box. The attendant can answer the call by clicking the **Take** button or they can ignore the call and let another attendant answer it.
- If the Attendant Console window is not minimized, the attendant is notified of an incoming call by a Ringing Loop button.

To activate call notification:

1. On the **Tools** menu click **Options**.
   The Options dialog box appears.
2. In the **Pop "Call Notification" dialog box when** list, select either check box:

Assigned extension rings - The attendant is notified of calls to the assigned extensions.
or
My extension rings -The attendant is notified if their extension has an incoming call.

If both check boxes are clear, the attendant is not notified of calls when the window is minimized.

3 Click the **OK** button.

When an outside call arrives for an assigned extension, a Call Notification dialog box appears to inform the assistant attendant of the call. Internal calls from an extension to an assigned extension are not displayed on the assistant attendant's window.

Restoring the Attendant Console window

Part-time attendants can have the Attendant Console window minimized or under another window. The attendant can restore the Attendant Console window from the taskbar by clicking the **Attendant Console** taskbar button. A quicker method is to set the Attendant Console window to restore automatically.

The Client component can automatically restore the window when the attendant's extension goes off-hook ("active").

To set the Attendant Console window to restore automatically:

1. On the **Tools** menu click **Options**.
   The Options dialog box appears with the Options tab open.
2. In the **Restore minimized Attendant screen when** option, click the **Call Answered on Attendant extension** check box.
3. Click the **OK** button.

When an outside call arrives for an assigned extension, a Call Notification dialog box appears to inform the assistant attendant of the call. Internal calls from an extension to an assigned extension are not displayed on the assistant attendant's window.

Setting the Attendant Selected option

The Selected tab lets the attendant view a selected subset of the full directory. This is useful if the attendant's incoming calls are directed to a limited number of extensions.

To display selected extensions in the Directory list of the Attendant Console window:

1. On the **Tools** menu click **Options**.
   The Options dialog box appears with the Options tab open.
2. Click the **Selected** tab.
3. To add an extension, click the extension you want in the **All extensions** list and click **>>** to copy it to the **Selected extensions** list.

To remove an extension from the Selected extensions list, click the extension number in the **Selected extensions** list and click **<<**.

4 Click the **OK** button.

Disabling Transfer options

If your Business Communications Manager base unit is not connected to a Centrex switch or is not connected to Business Communications Manager Voice Messaging, you can disable the Link Transfer or VM Transfer buttons on the Attendant Console window.

To disable the Transfer Options:

1 On the **Tools** menu click **Options**.
The Options dialog box appears with the Options tab open.
The Transfer Options are in the bottom right of the dialog box.

2 Select the **Disable VM Transfer** check box to disable the VM Transfer button
or
select the **Disable Link Transfer** check box to disable the Link Transfer button.

If they are disabled the buttons appear dimmed on the Attendant Console window. You can re-enable the buttons by clearing the check mark from the appropriate check box.

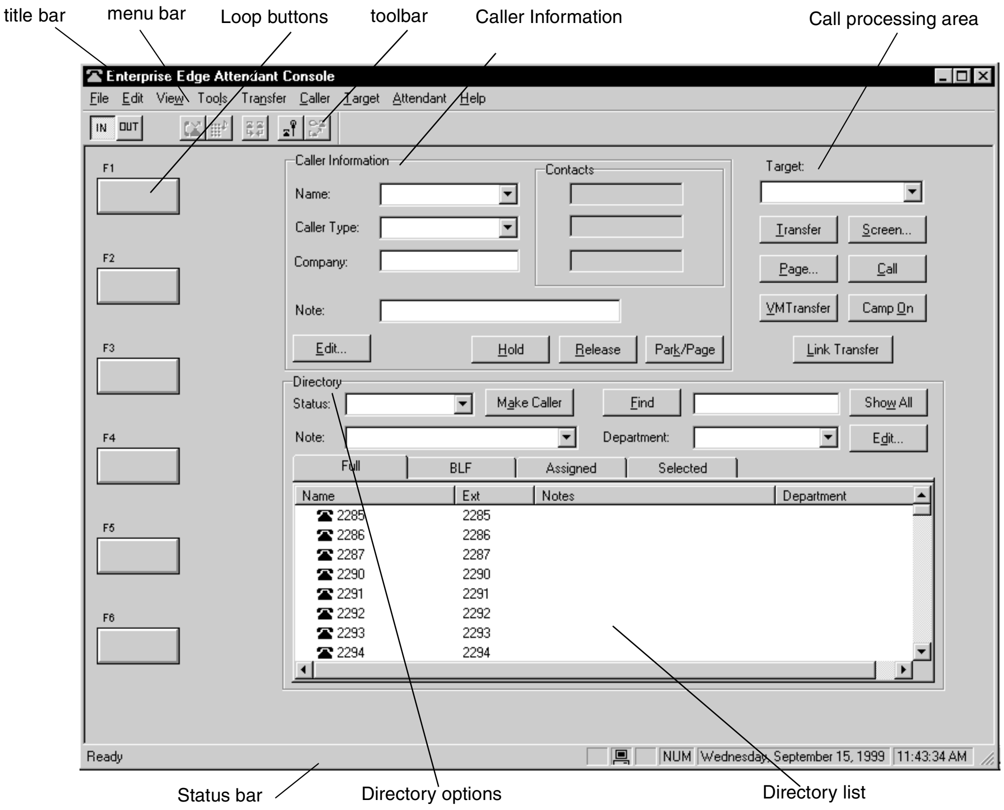
Chapter 3
Using the Attendant Console window

This section explains how to use the components of the Attendant Console window.

Components of the Attendant Console window

The Attendant Console window components are shown in Figure 2:

Figure 2 Attendant Console window components


title bar
menu bar
Loop buttons
toolbar
Caller Information
Call processing area
Enterprise Edge Attendant Console
File Edit View Tools Transfer Caller Target Attendant Help
IN OUT
F1
F2
F3
F4
F5
F6
Caller Information
Name:
Caller Type:
Company:
Note:
Contacts
Edit...
Hold
Release
Park/Page
Target:
Transfer
Screen...
Page...
Call
VMTransfer
Camp On
Link Transfer
Directory
Status:
Make Caller
Find
Show All
Note:
Department:
Edit...
Full
BLF
Assigned
Selected
Ready
NUM
Wednesday, September 15, 1999
11:43:34 AM
Status bar
Directory options
Directory list

Name	Ext	Notes	Department
☎ 2285	2285		
☎ 2286	2286		
☎ 2287	2287		
☎ 2290	2290		
☎ 2291	2291		
☎ 2292	2292		
☎ 2293	2293		
☎ 2294	2294		

Title bar

The title bar is at the top of the Attendant Console window. At the top right side are the Windows standard Minimize, Maximize and Close buttons.

Menu bar

The menu bar is under the title bar and contains the File, Edit, View, Tools, Transfer, Caller, Target, Attendant and Help menus. Use these menus to access Attendant functions.

Toolbar

The toolbar is below the menu bar and contains several buttons that provide quick and easy access to some Attendant Console functions.

Loop buttons

The Loop buttons on the left of the Attendant Console window are labeled F1 to F6. You use the Loop buttons to answer calls. Each Loop button can handle a single call. The Loop buttons have colors and words that represent call activities. For example, a yellow Loop button with the word Ringing represents an incoming call at the attendant's extension. For information on how to hide or display the Loop buttons, except for those that indicate call activity, refer to "View menu" on page 26.

Caller Information options

The Caller Information options area is in the top center of the Attendant Console window and displays information about the caller that is stored in the Business Communications Manager base unit database.

Call processing area

Use the Target list box and the Call Processing buttons at the top right of the Attendant Console window to make and transfer calls.

Directory list

The Directory list is at the bottom of the Attendant Console window and contains the components shown in Table 3.

Table 3 Directory options

Directory list	displays the Name, Extension, Notes and Department of extensions. From the directory list you can select a name and number to appear in the Target list box. The Directory list also shows the telephone status icon and the person status icon for extensions.
Note and Status list boxes	let you change the status of the employee and include a note for an extension.
Find and Department boxes Show All and Edit buttons	search for extensions and edit employee information and extension records.

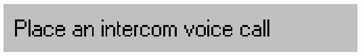
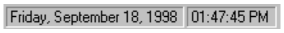
Status Bar

To display the Status Bar:

1 Click **View** and then click **Status Bar**.

The Status Bar contains the components shown in Table 4.

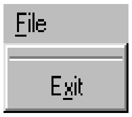
Table 4 Status bar components

 Place an intercom voice call	Displays the functions of the toolbar button when you point to it.
⚐	The Loop Overflow icon appears if there are more calls waiting to be answered than available Loop buttons.
NUM	Appears if the Num Lock key is on.
 Friday, September 18, 1998 01:47:45 PM	Shows the date and time.

Using the menu bar

The menu bar contains the menus on the Attendant Console window. Help tips appear in the Status bar at the bottom of the Attendant Console window if you move the mouse pointer over the commands in the menu.

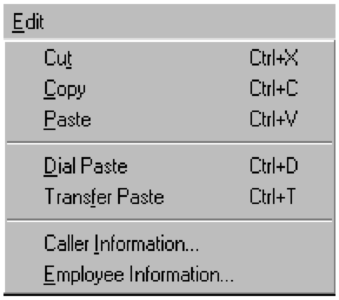
File menu



The File menu contains:

Exit	closes the Client component.

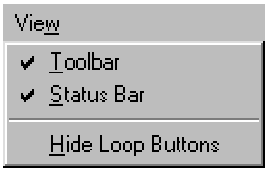
Edit menu


Edit
Cut Ctrl+X
Copy Ctrl+C
Paste Ctrl+V
Dial Paste Ctrl+D
Transfer Paste Ctrl+T
Caller Information...
Employee Information...

The Edit menu contains:

Cut	cuts selected text and moves it to the Clipboard.
Copy	copies a selection of text and moves it to the Clipboard.
Paste	inserts the Clipboard contents at the insertion point.
Dial Paste	dials the number in the Clipboard. The number can include special characters such as hyphen, parenthesis, space or period. Note: The Clipboard contents are added to any characters already in the Target list box. This lets you type a routing code in the Target list box and then click the Dial Paste button.
Transfer Paste	transfers a call to the number in the Clipboard.
Caller Information	opens the Edit Caller Information dialog box. The Edit button in the Caller Information list performs the same function. Refer to “The Edit Caller Information dialog box” on page 34 and “Maintaining caller information” on page 59.
Employee Information	opens the Edit Employee Information dialog box. The Edit button in the Directory list performs the same function. Refer to “The Edit Employee Information dialog box” on page 38 and “Maintaining employee information” on page 62.

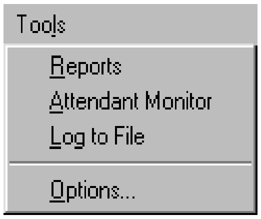
View menu


View
✓ Toolbar
✓ Status Bar
Hide Loop Buttons

The View menu contains:

Toolbar	shows or hides the toolbar.
Status Bar	shows or hides the Status Bar.
Hide Loop Buttons	shows or hides the inactive Loop buttons. When selected, only the active Loop buttons appear on the Attendant window.

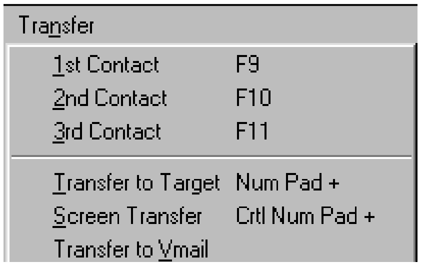
Tools menu


Tools
Reports
Attendant Monitor
Log to File
Options...

The Tools menu contains:

Reports	starts the Reports component.
Attendant Monitor	opens the Attendant Monitor dialog box that displays diagnostic information sent by the Client component and received back from the Server component. The Attendant Monitor helps in troubleshooting.
Log to File	writes Client component activity and Server messaging to a log file. This is used for troubleshooting.
Options	opens the Options dialog box, which has three tabs: • the Options tab: lets you specify the Server ID, enter the Attendant extension, set the conditions for making the Attendant Console Attendant window appear, and set call redirection. • The Assigned tab: lets you choose extensions to appear in the Directory List's Assigned tab. • The Selected tab: lets you select which extensions appear in the Directory List's Selected tab. For more information, refer to "Using the Directory options" on page 37.

Transfer menu

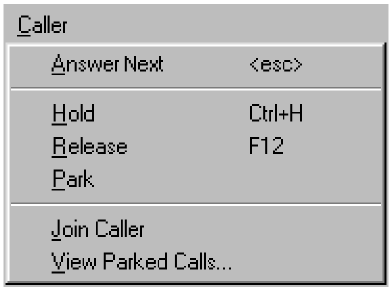

Transfer
1st Contact F9
2nd Contact F10
3rd Contact F11
Transfer to Target Num Pad +
Screen Transfer Crtl Num Pad +
Transfer to Vmail

The Transfer menu contains:

1st Contact	transfers the active call to the caller's first contact. 1st Contact is enabled if there is an active call and a contact in the first box of the Contacts list.
2nd Contact	transfers the active call to the caller's second contact. 2nd Contact is enabled if there is an active call and a contact in the second box of the Contacts list.

3rd Contact	transfers the active call to the caller’s third contact. 3rd Contact is enabled if there is an active call and a contact in the third box of the Contacts list.
Transfer to Target	transfers the active call to the extension in the Target list box. The Transfer button performs the same function.
Screen Transfer	screens a call transfer of an active call to the extension number in the Target list box. The caller is put on hold when you click Screen Transfer. The caller is connected when you click Transfer Now in the Screen Transfer dialog box. The Screen button performs the same function. Refer to “Parking, holding and screening calls” on page 48.
Transfer to VMail	transfers the active call to the voice message mailbox of the extension in the Target list box. The VMTransfer button performs the same function.

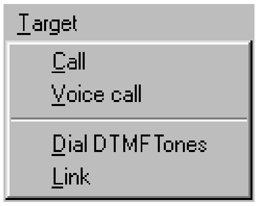
Caller menu



The Caller menu contains:

Answer Next	answers the next call in the queue.
Hold	places an active call on hold. The Hold button performs the same function. Refer to “Parking, holding and screening calls” on page 48.
Release	disconnects the active call. The Release button performs the same function.
Park	parks the active call so you can page the person whose extension is in the Target list box. A list of all parked calls appears in the Parked Calls dialog box when you click View Parked Calls on the Caller menu. You can retrieve the call from the View Parked Calls dialog box by pressing the Retrieve button. For more information on viewing parked calls, refer to “Parking, holding and screening calls” on page 48. The Park/ Page button performs the same function.
Join Caller	connects two callers by joining the active call with the call on hold. Refer to “Linking and Joining calls” on page 52.
View Parked Calls	opens the Parked Calls dialog box, which displays calls parked by all attendants. A call can be retrieved by any attendant or from any telephone on the Business Communications Manager base unit. For more information, refer to “Linking and Joining calls” on page52 .

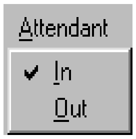
Target menu



The Target menu contains:

Call	initiates a call from the attendant extension to the number in the Target list box. The Call button performs the same function.
Voice Call	places a voice call from the Attendant to the extension in the Target list box. For more information, refer to "Contacting employees using Voice Call" on page 51.
Dial DTMF Tones	dials DTMF-tone digits to the external number in the Target list box. This must be used in conjunction with the Link button and with outdialing on an active line to access other systems or carriers (for example, Centrex).
Link	accesses (hookflash) Centrex or CO line features (such as off-premise transfer or conference) or other systems or carriers while on an incoming call. Click the Link button while on an incoming call to place the caller on hold and generate a Link signal (also called flash or recall) on the active line. The DTMF button is used with the Link button to outdial the digits in the Target list box. For more information, refer to "Linking and Joining calls" on page 52.

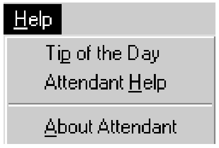
Attendant menu



The Attendant menu contains:

In	toggles with the Out command. When set to In, the attendant is taking calls.
Out	toggles with the In command. When set to Out, the attendant is not taking calls. Calls that ring at the attendant's telephone are forwarded to the backup attendant position. Note: To redirect calls to a backup extension, on the Tools menu click Options. Set redirect options in the Options dialog box.

Help menu



The Help menu contains:

Tip of the Day	shows or hides the Tip of the Day dialog box when Attendant starts.
Attendant Help	displays Help files.
About Attendant	displays program information, revision number, copyright information, and system information.

Using keyboard shortcuts

You can use the keyboard to do many tasks quickly in Attendant Console. There are three kinds of keyboard shortcuts. The first two are standard to Windows. The third shortcut is unique to Attendant Console. The keyboard shortcuts are:

- Access keys, which are the letters underlined in menu names and commands. For more information, refer to "Access keys" on page 30.
- Shortcut keys defined on the menus. For more information, refer to "Shortcut keys defined on the menus" on page 30.
- Shortcuts initiated by pressing the Alt key and another key. For more information, refer to "Shortcuts initiated by pressing the Alt key and another key" on pag e31.

Access keys

In Attendant Console, each menu name and each command in the menu has an underlined letter called an access key.

To use the Access keys:

1. Press the **Alt** key.
   This gives you access to the menu names in the menu bar.
2. Press the Access key for the menu name. For example, to open the Edit menu, press **Alt** and then **E**.
3. Press the Access key for the desired command. For example, to select Caller Information from the Edit menu, press **I** and the Edit Caller Information dialog box appears.

Shortcut keys defined on the menus

Shortcut key combinations are shown beside some menu commands. When you use the Ctrl key and another key, press Ctrl key while you press the other key. The additional shortcut keys are shown in Table 5 to Table 7.

Table 5 Edit Menu shortcut keys

Cut	Ctrl+X
Copy	Ctrl+C
Paste	Ctrl+V
Dial Paste	Ctrl+D
Transfer Paste	Ctrl+T

Table 6 Transfer Menu shortcut keys:

1st Contact	F9
2nd Contact	F10
3rd Contact	F11
Transfer to Target	Num Pad+
Screen Transfer	Ctrl Num Pad+

Table 7 Caller Menu shortcut keys

Answer Next	Esc
Hold	Ctrl+H
Release	F12

Shortcuts initiated by pressing the Alt key and another key

You can access Call handling functions directly from the Attendant window by pressing the Alt key and the underlined keys in the commands. You must press the Alt key while you press other key. For example, to place an active call on Hold, press the **Alt** key and press **H**.

Using right-click capability

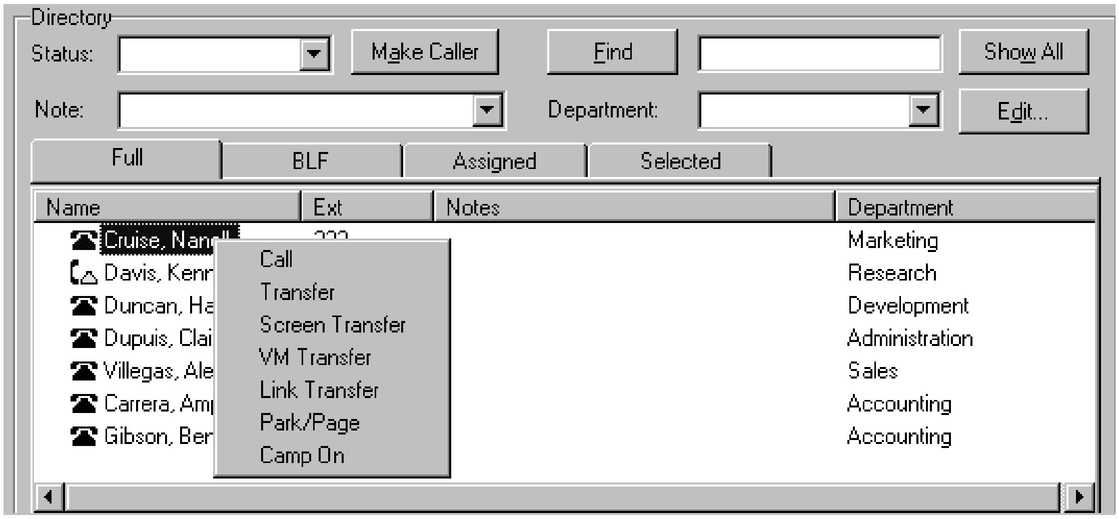
Right-click capability lets you process calls faster by minimizing mouse movement.You can use right-click capability to:

- originate a call
- transfer a call
- screened transfer
- transfer a call to voice message mailbox
- link transfer
- park a call and page an employee
- camp a call on an extension

To use right-click capability:

1. Click a name or extension in the **Directory** list and right-click (see Figure 3).
   A list of call processing commands appears.
2. Click one of the call processing commands.

Figure 3 Right-click capability


Directory
Status:
Make Caller
Find
Show All
Note:
Department:
Edit...
Full
BLF
Assigned
Selected
Call
Transfer
Screen Transfer
VM Transfer
Link Transfer
Park/Page
Camp On

Name	Ext	Notes	Department
☎ Cruise, Nan			Marketing
Davis, Kenr			Research
☎ Duncan, Ha			Development
☎ Dupuis, Clai			Administration
☎ Villegas, Ale			Sales
☎ Carrera, Am			Accounting
☎ Gibson, Ber			Accounting

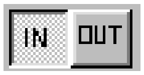
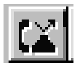
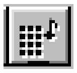
Using the toolbar

The toolbar contains several buttons that provide quick and easy access to some of the Attendant Console functions.

To display the toolbar:

1 Click the **View** menu and then click **Toolbar**.
The toolbar is displayed across the top of the Attendant window below the menu bar.

The toolbar buttons are:

	Use the In and Out buttons to indicate whether or not you can take calls.
	Use the Link button to access Centrex or CO line features (such as off-premise transfer or conference) or other systems or carriers while on an outside call. For more information, refer to "Linking and Joining calls" on page 52.
	Use the DTMF button to dial DTMF-tone digits to the external number in the Target list box. This must be used with the Link button and with outdialing on an active line to access other systems or carriers such as Centrex. This button also sends special characters (such as * and #) from the Target list box to other services such as Interactive Voice Response (IVR) and Business Communications Manager messaging services.

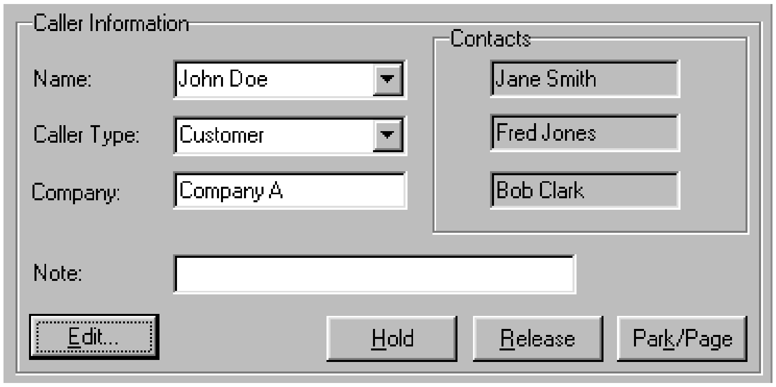
	Use the Join button to connect two callers by joining the active call with the call that is on hold at the Attendant Console. Refer to “Linking and Joining calls” on page 52.
	Use the View Parked button to display the Parked dialog box, which lists parked calls. Calls can be parked and retrieved from any telephone connected to your Business Communications Manager base unit. Refer to “Parking calls and paging employees” on page48 .
	Use the Voice Call to initiate a call from the attendant’s telephone to the speaker of another telephone without causing the telephone to ring. Refer to “Parking calls and paging employees” on page48 .
F1	Six Loop buttons, labeled F1 to F6, are used to answer calls. Each Loop button represents call. The color of the Loop button and the word that appears shows the type of call activity occurring. You can display or hide Loop buttons. On the **View** menu click **Hide Loop Buttons**. When a check mark appears, only active Loop buttons appear. When Hide Loop Buttons is not selected, all the Loop buttons appear.

Words and colors on Loop buttons:

Ringing	A yellow Loop button with the word Ringing appears when an incoming call rings at the attendant’s extension.
Active	A green Loop button with the word Active appears when a call is answered by the attendant. Only one Loop button is active at one time.
On Hold	A blue Loop button with the words On Hold appears when a call is on hold at the attendant’s extension.
Callback	An orange Loop button with the word Callback appears when a call returns to the attendant from the Target extension.
Ringing	A red Loop button with the word Ringing appears when a call rings at an Assigned extension.
	Grey Loop buttons appear when the Loop button is inactive and when Hide Loop Buttons is not selected.

Using Caller Information options

Caller Information options are in the top center of the Attendant Console window. When you answer a call, the Caller Information options show information about the caller.

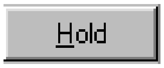


Name: John Doe
Caller Type: Customer
Company: Company A
Note:
Jane Smith
Fred Jones
Bob Clark

Caller Information options include:

- Name, Caller Type list boxes (Unclassified, Personal, Employee, Vendor, or Customer), Company and Note boxes
- Contacts boxes that display the three numbers the caller most frequently calls in your company

The following buttons appear in the Caller Information options:

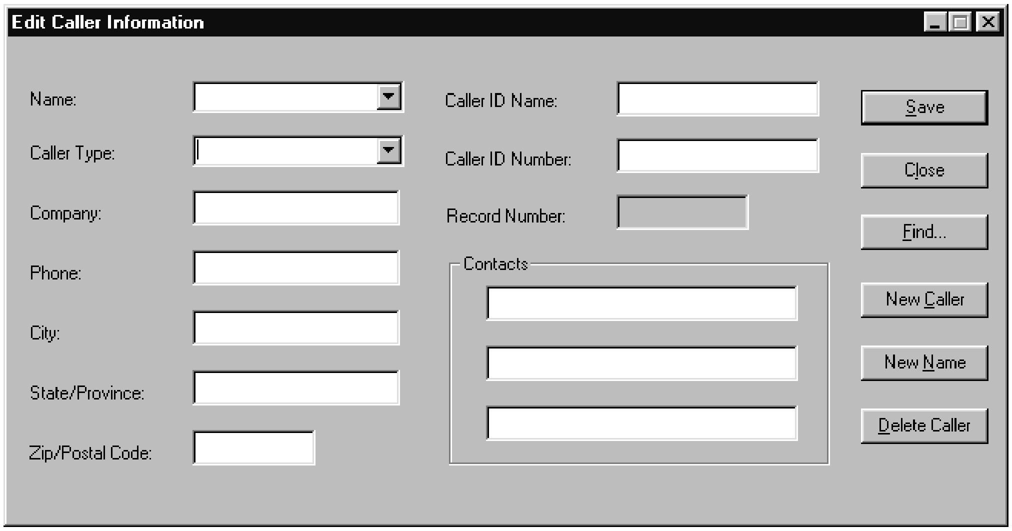
	opens the Edit Caller Information dialog box. Refer to "Maintaining caller information" on page 59.
	places the active call on Hold.
	disconnects the active call.
	places the active call in park and opens the Page dialog box so that you can page the person whose extension is in the Target list box. Refer to "Parking calls and paging employees" on page 48.

The Edit Caller Information dialog box

Use the Edit Caller Information dialog box to change or add information about callers.

To access the Edit Caller Information dialog box:

1 Below the **Caller Information** options, click the **Edit** button.
The Edit Caller Information dialog box appears.


Edit Caller Information
Name:
Caller Type:
Company:
Phone:
City:
State/Province:
Zip/Postal Code:
Caller ID Name:
Caller ID Number:
Record Number:
Contacts
Save
Close
Find...
New Caller
New Name
Delete Caller

The Edit Caller Information dialog box contains the following boxes:

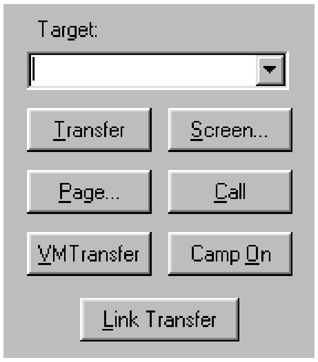
Name	contains the caller's name. A first time caller name is the Caller ID name provided by the telephone company. You can change this Caller ID name to the caller's name.
Caller Type	contains the classification of the caller. There are five types: Unclassified, Personal, Employee, Vendor and Customer.
Company	contains the name of the company associated with the caller. The Caller ID name automatically appears in this box. You can edit the name here or in the Caller Information options.
Phone	contains the telephone number of the caller.
City, State/Province, and ZIP/Postal Code	contains the caller's address.
Caller ID Name and Caller ID Number	contains information provided through subscription by the public switched telephone network.
Record Number	contains a unique caller record identifier number. You cannot change the information in this box.
Contacts	lists the caller's three most frequently called persons in your company.

The following buttons appear in the Edit Caller Information dialog box:

Save	saves the caller record displayed in the boxes of the Edit Caller Information dialog box to the database.
Close	closes the Edit Caller Information dialog box without saving the changes to the record.

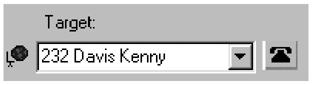
	opens the Find dialog box in the Edit Caller Information dialog box.
	creates a blank caller record that you can add information to.
	creates a new name caller record using an existing caller record. All boxes except the Name box contain the existing caller information. You must enter a new name.
Delete Caller	deletes caller record displayed in the Edit Caller Information dialog box from the database.

Using the call processing area


Target:
Transfer
Screen...
Page...
Call
VMTransfer
Camp On
Link Transfer

The call processing area is at the top right of the Attendant window and includes:

- the Target list box
- the Transfer, Page, VMTransfer, Screen, Call, Camp On and Link Transfer buttons.

 Target: 232 Davis Kenny	Use the Target list box to enter the extension or telephone number to call.

The following buttons are in the call processing area:

	transfers the active call to the extension number in the Target list box.

	screens a call transfer of an active call to the extension number in the Target list box. Click the Screen button and the caller is put on hold. The caller is connected to the Target extension when you click Transfer Now in the Screen Transfer dialog box.
	opens the Page dialog box.
	makes a call from the attendant's extension to the number in the Target list box.
VMTransfer	transfers the active call to the voice message mailbox of the extension in the Target list box so the caller can leave a message.
	places a call on hold at the target extension.
Link Transfer	accesses Centrex or CO line features (such as off-premise transfer or conference) or other systems or carriers while on an outside call. It is also used to tone dial the digits in the Target list box.

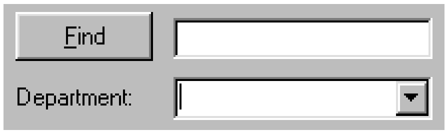
Using the Directory options

The Directory options are at the bottom of the Attendant Console window. They contains tabbed directories that show views of the extensions on the Business Communications Manager telephone system. The Directory options also contain buttons and boxes for searching and editing extension and employee information.

Search and edit functions in the Directory options

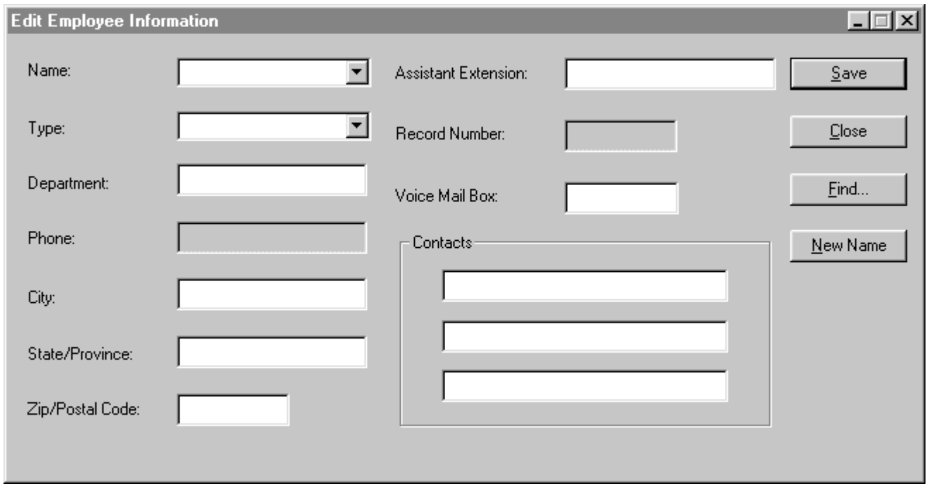
The buttons and boxes in the Directory options are used to search for and edit employee information that appears in the Directory list:.

	indicates the status of the employee. When you select a category from the list box, a corresponding icon appears in the first column of the Directory list. The available category are: None, Not at Desk and Out of Office.
	used to enter information about individual employees.
Make Caller	changes the caller or Caller ID record to an employee record if an employee calls in from outside. This prevents an employee name from appearing in the caller record related to the Caller ID name or number.

 Find Department:	finds names of individual employees or groups of employees by department. The Find box finds employee by name. The Department box finds employees by department. Type the first few letters of the name in the Find box and click the Find button. Names that start with the letters appear in the Directory list. To search by department, select a department from the Department list box and then click the Find button. Employees in the selected department appear in the Directory list.
	resets the Full tab Directory view to display all names and extensions.
	opens the Edit Employee Information dialog box. If you select a name or extension in the Directory list, information about to that name or extension appears in the dialog box. If you do not select a name or extension, the Edit Employee Information dialog box is empty. You can also access the Edit Employee Information window by clicking the Edit menu and clicking Employee Information. Refer to "The Edit Employee Information dialog box" on page 38 and "Maintaining employee information" on page 62.

The Edit Employee Information dialog box

This dialog box appears when you click the **Edit** button in the **Directory** option. Use the Edit Employee dialog box to change or add information about employees. For further information, refer to "Maintaining employee information" on page 62.


Edit Employee Information
Name:
Type:
Department:
Phone:
City:
State/Province:
Zip/Postal Code:
Assistant Extension:
Record Number:
Voice Mail Box:
Contacts
Save
Close
Find...
New Name

The Edit Employee Information dialog box contains the following boxes that you can edit, unless indicated otherwise:

Name	contains the employee’s name or the extension number if a name is not entered.
Type	contains the classification of the employee record. “Employee” is the default.
Department	contains the employee’s department name.
Phone	contains the employee’s telephone number.You cannot edit this box.
City	contains the employee’s city.
State/Province	displays the state or province of the employee.
ZIP/Postal Code	displays the ZIP code or Postal Code of the employee.
Assistant Extension	displays the extension of the person who handles calls for the extension when the employee cannot.
Record Number	displays a unique record identifier number. You cannot edit this box.
Voice Mail	displays the voice message mailbox extension of the employee. You cannot edit this box.
Contacts	lists the employee’s three most frequently called persons or extensions in the Company.

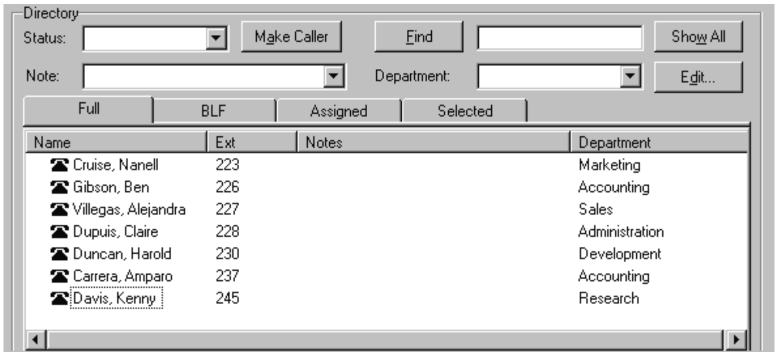
The following buttons appear in the Edit Employee Information dialog box:

Save	saves the employee information displayed to the database.
Close	closes the window without saving the record.
Find...	opens the Find dialog box in the Edit Employee Information dialog box. Refer to “Maintaining employee information” on page 62.
New Name	creates a new name for the extension and does not change the other boxes.

Directory list

Directory list tab views

There are four Directory list views that are accessed by clicking tabs. They are:.



Name	Ext	Notes	Department
☎ Cruise, Nanell	223		Marketing
☎ Gibson, Ben	226		Accounting
☎ Villegas, Alejandra	227		Sales
☎ Dupuis, Claire	228		Administration
☎ Duncan, Harold	230		Development
☎ Carrera, Amparo	237		Accounting
☎ Davis, Kenny	245		Research

Full	displays extensions connected to the Business Communications Manager base unit, including wireless Companion telephones, Business Communications Manager Voice Messaging extensions and Hunt group extensions. This view displays the maximum amount of extension and employee information allowed in the Directory list.
BLF	displays extensions connected to the Business Communications Manager base unit, including wireless Companion telephones, Business Communications Manager Voice Messaging extensions and Hunt group extensions. This view displays only the person status icon, telephone status icon and employee name. This allows more extensions to be displayed at once.
Assigned	displays specific extensions for which an assistant attendant is responsible. Like the Full tab view, the Assigned tab view displays the maximum amount of extension and employee information allowed in the Directory list. Extensions are assigned or removed from the Assigned tab view in the Options dialog box. Refer to "Assistant attendant setup" on page 19.
Selected	displays a subset of the Full tab extensions. The Selected tab view displays the maximum amount of extension and employee information allowed in the Directory list. Selected extensions are useful if the attendant directs incoming calls to a limited number of extensions and wants to display only those extensions. Extensions are added or removed from the Selected tab in the Options dialog box.

Directory list employee and extension information

Each Directory list tab view shows the following employee and extension information..

Note: The first two columns are not labeled and contain only icons, not text

person status icon	This is the leftmost column in the Directory list views and does not have a column heading. It can contain an icon or be blank. The person status icon shows the location of the employee. Refer to "Search and edit functions in the Directory options" on page 37.

telephone status icon	This is the second column from the left in the Directory list views and does not have a column heading. The telephone icons show the current status of the telephones connected to the Business Communications Manager base unit. They also show additional information such as whether the extension is ready to receive calls or is on Do Not Disturb (DND). The telephone icons are:

	Available for calls	Do Not Disturb	Call Forwarded
On-hook	☎	☒	☎
Off-hook	☏	☒	☏

Note: A Hunt Group is a group of telephones that can be called by a single number. Hunt Groups are configured in your Business Communications Manager base unit. The telephone status icon for a Hunt Group extension is blue and always indicates on-hook.

The other columns in the Directory list are:

Name	the first labeled column on the left, containing the names of employees.
Ext	contains telephone extensions.
Notes	displays additional information about the employee that the attendant enters. Notes can be edited only from the Notes list box at the top of the Directory dialog box.
Department	displays the name of the department to which the employee belongs. Enter the department by clicking the Edit button, clicking Employee Information and using the Edit Employee Information dialog box. Refer to "Maintaining employee information" on page 62.

Sorting information in the Directory list tabs

You can sort the employee information in the Directory list tabs by extension, name, notes or department. In the Full, Assigned and Selected views, the information appears in columns with headings.

To sort alphabetically by Name, Notes or Department:

In the **Directory** list, click either the **Name**, **Notes** or **Department** column heading. The information sorts alphabetically by the column you select.

To sort by extension:

In the **Directory** list, click the **Ext** column heading. The information sorts numerically by extension.

Chapter 4
Handling calls

With Attendant Console you can manage calls using a mouse or a keyboard. When a call comes in, you can respond to the caller using either a telephone or a headset. If you use a headset your hands are free to use your PC.

The basic steps in processing an incoming call with Attendant Console include:

- answering a call. Refer to "Answering calls as an attendant" on pag e43.
- finding the called person's extension and placing it in the Target list box. Refer to "Finding the called person's extension and placing it in the Target list box" on page 45.
- transferring a call. Refer to "Transferring a call" on page47 .

Other telephone functions include:

- parking the incoming call and paging the employee. Refer to "Parking, holding and screening calls" on page 48.
- linking and joining calls. Refer to "Linking and Joining calls" on page 52.
- handling a callback call. Refer to "Handling a callback call" on pag e53.
- making a call from the attendant's extension. Refer to "Making a call from the attendant's extension" on pag e54.
- managing calls at the employee's telephone. Refer to "Handling calls at an employee's telephone" on page55 .

The following steps explain how you handle calls as an attendant using the Attendant window. For further information about the Attendant window, refer to "Components of the Attendant Console window" on page 23.

Answering calls as an attendant

The Attendant Console window uses six Loop buttons to answer calls. Each Loop button can handle a single call in progress. The color of the Loop button changes depending on the activity.

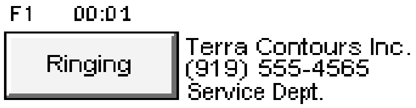
To show or hide inactive Loop buttons:

On the View menu click **Hide Loop Buttons**.

If the Loop buttons are hidden, they appear when a call occurs. If the Loop Overflow icon appears on the Status Bar there are more than six calls.

A new incoming call appears as a yellow Loop button that displays the word Ringing. Information about the call appears beside the Loop button to assist you with personalized call processing:

- the function key name above the Loop button, (F1 in the example) shows the key on the PC keyboard that relates to the ringing Loop button.



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Service Dept.

- the timer above the Loop button shows in minutes and seconds how long the call is active.
- the company name to the right of the Loop button shows the company that is calling. The company name is either from the caller database or from Caller ID. If you do not have Caller ID, this line of display is blank. You can enter or edit a company name using the Caller Information list box.
- The Caller ID name on the second line of the information to the right of the Loop button, shows the Caller ID number provided by the telephone company. If you do not have Caller ID, this line of display is blank.
- The bottom line of information to the right of the Loop button shows the name of the Business Communications Manager base unit server line that carries the call.

To answer an incoming call:

1 A Loop button turns yellow displays the word Ringing. You can respond to a call in one of four ways:

- Click the yellow **Ringing Loop** button.
- Press the function key on the PC keyboard (for example F1), shown above the Loop button.
- Press the Esc key.
- Press the associated intercom or line key on your telephone.

The Loop button becomes green and displays the word Active.

2 Answer the call with your company greeting. If you are answering a call from this number or company for the first time, you can enter caller information. For further information, refer to "The Edit Caller Information dialog box" on page 34. If this is not the first time you have answered a call from this number or company, refer to "Finding the called person's extension and placing it in theTarget list box" on page45 .

To release or hang up a call:

Click the **Release** button.
The call disconnects and the Loop button becomes idle.

Note: Server line names are programmed in your Business Communications Manager base unit by your telephone administrator.

Note: If your Business Communications Manager base unit is shared by two or more companies, the telephone administrator can associate the names of each company with their hardware lines. This means that you can tell which company is being called before answering the call.

Finding the called person’s extension and placing it in the Target list box

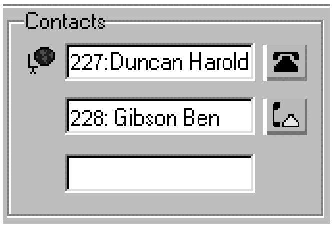
After you answer a call, find and click the called extension to put it in the Target list box.

There are four ways to locate the correct extension when you are ready to process a call, including:

- “Using the Contacts boxes” on page 45
- “Using the Directory tab views” on page 46
- “Using the Directory Find box” on page 46
- “Using the Department list box” on pag e47

Using the Contacts boxes

The Contacts boxes contain the extension numbers and names of the three most frequently called parties that the caller requests. These caller contacts are listed from most frequently to least frequently called.



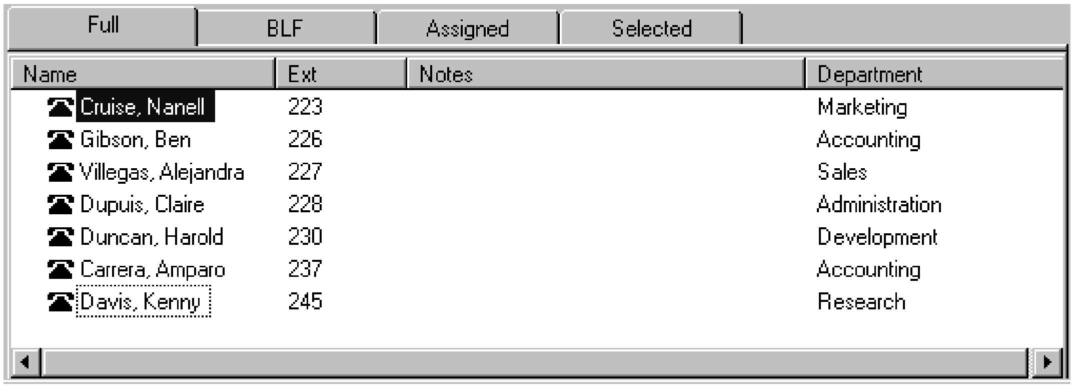
To the left of each Contact box is the current person status icon for that contact, and to the right of each Contact box is that person’s telephone status icon.

To transfer a caller to one of the three most frequently called parties:

1 Double-click the telephone status icon.
The call is forwarded to that extension.

Using the Directory tab views

The tab views in the Directory dialog box show information about extensions.



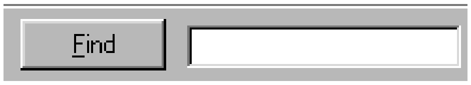
Name	Ext	Notes	Department
Cruise, Nanell	223		Marketing
Gibson, Ben	226		Accounting
Villegas, Alejandra	227		Sales
Dupuis, Claire	228		Administration
Duncan, Harold	230		Development
Carrera, Amparo	237		Accounting
Davis, Kenny	245		Research

To search by extension or name:

1. Click the **Full**, **BLF**, **Assigned** or **Selected** tab.
2. Click the extension, the name or the department of the employee being called in the list. The name or extension number appears in the Target list box.
3. Click the **Transfer** button.

Using the Directory Find box

Use the Directory Find box to search by name.



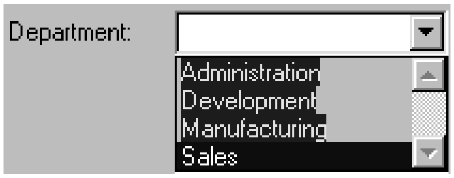
To search by Name and move the target extension to theTarget list box:

1. In the **Find** box, type the first letter or letters of the person’s last name or first name, depending on how the employee names are entered. For example, if they are entered “Jane Doe”, type “j”. If they are entered “Doe, Jane”, type “d”.
2. Click the **Find** button.
   Any matching names are displayed in a list under the Full tab.
3. In the **Directory** list, click the name of the employee being called.
   The name appears in the Target list box.
4. To restore all names in the Full tab view, click the **Show All** button.

After the search result is shown in the Full tab view, the BLF, Selected and Assigned tab views remain unchanged.

Using the Department list box

You can search for a name by department from the Full tab using the Department list box.



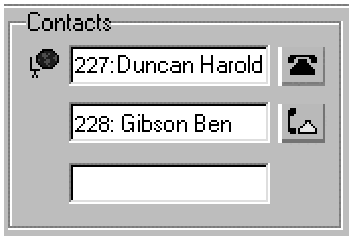
To search by department:

1. Click the arrow of the **Department** list box.
   The list appears displaying the departments associated with extensions.
2. Click a department name from the list and the department name appears in the Department list box.
3. Click the **Find** button.
   The extensions that match the department appear in a list under the Full Directory tab view.
4. In the **Directory** list box, click the name of the employee being called.
   The name appears in the Target list box. The search result is shown in the Full tab view. The BLF, Selected and Assigned tab views remain unchanged.
5. To restore all names in the Full tab view, click the **Show All** button.

Note: Department names for each extension are created in the Edit Employee Information dialog box.

Transferring a call

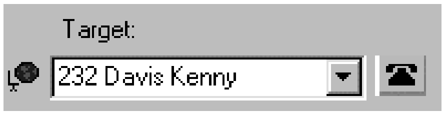
You can transfer an active call to an extension using the Contacts box, theTarget list box or the Directory dialog box. You can also transfer a call to a voice message mailbox.



To transfer using the Contacts box:

Double-click the telephone status icon to the right of the **Contacts** box.
The call transfers to the displayed extension.

To transfer using the Target list box:



Make sure the extension in the Target list box is correct. Double-click the telephone status icon beside the Target list box or click the **Transfer** button. You can also click the **Target** list box and press the **Enter** key on the keyboard.
The call transfers to the displayed extension.

To transfer using the Directory list:

Double-click the telephone status icon or the name of the person to whom you are transferring the call. The call transfers.

To transfer a call to the voice message mailbox of the extension in the Target list box:

1. Type the extension number of the employee in the **Target** list box.
2. Click the **VMTransfer** button.
   The call transfers and the Loop button becomes idle.

Note: You can make the VMTransfer button inactive when a non-Business Communications Manager Voice Messaging system is attached to the Business Communications Manager base unit.

To transfer a call to an outside number:

1. With an active incoming call on Attendant Console, in the **Target** list box type an outside telephone number.
2. Click the **Link Transfer** button.
   The Loop button label shows Active, and the number in the Target list box is tone dialed.
3. Click the **Release** button and the incoming call transfers to the outside telephone number.
   The Attendant disconnects from the call and the Loop button becomes idle.

Parking, holding and screening calls

With BCM Attendant Console you can screen calls for a called person, place the calls on hold and park calls so that you can page the called person. You can also talk to the employee in intercom mode using Voice Call.

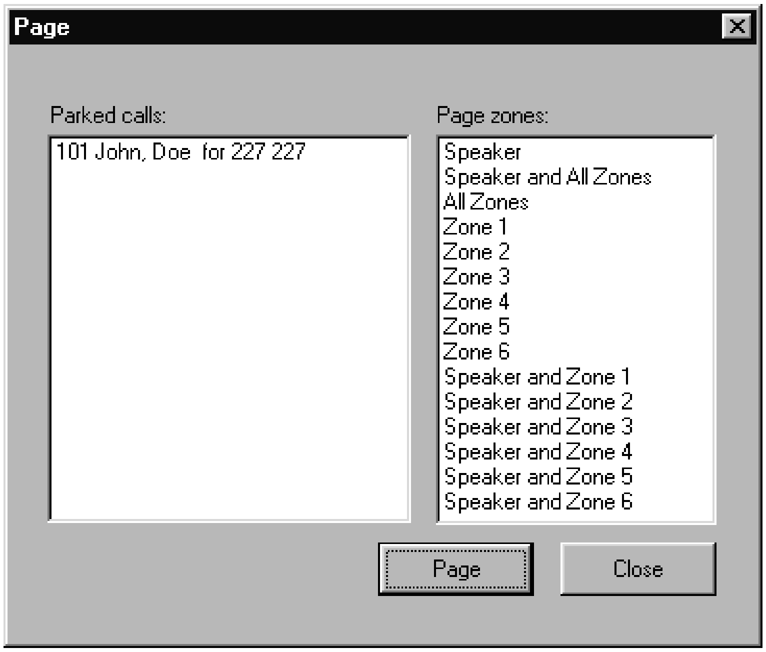
Parking calls and paging employees

The Park/Page feature lets you place a call on hold and page the employee.You can also use this method to page an employee when there is no active call.

To park a call and page an employee:

1 In the **Target** list box type the extension of the called person.
If there is no active call and you want to page an employee, type or select the extension of the person being paged in the Target list box.

2 Click the **Park/Page** button.
The Page dialog box appears. The Page dialog box shows all parked calls and all page zones so that you can page the called person.



Parked calls:
101 John, Doe for 227 227

Page zones:
Speaker
Speaker and All Zones
All Zones
Zone 1
Zone 2
Zone 3
Zone 4
Zone 5
Zone 6
Speaker and Zone 1
Speaker and Zone 2
Speaker and Zone 3
Speaker and Zone 4
Speaker and Zone 5
Speaker and Zone 6

3 Click a call in the **Parked calls** list and then click the appropriate zone in the **Page zones** list.

4 Click the **Page** button.
The Console Message box appears and the speakers on the telephones in the selected zone emit a low-level tone.

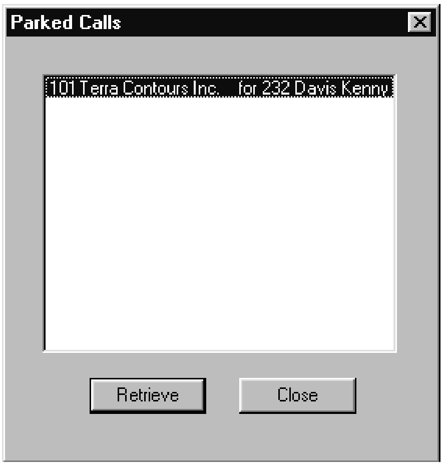
5 Speak into the headset or handset, depending on your setup. When you are finished, click the **OK** button.

To retrieve a parked call:

1 On the **Caller** menu, click **View Parked Calls.**
The Parked Calls dialog box appears.

2 Select the parked call.

3 Click the **Retrieve** button.



101 Terra Contours Inc. for 232 Davis Kenny

or

1 On the toolbar, click .
The Parked Calls dialog box appears.

2 Select the parked call.

3 Click the **Retrieve** button.

To view parked calls:

1 On the **Caller** menu, click **View Parked Calls**.
The Parked Calls dialog box appears, displaying:
   - the park number of the call
   - the caller's name (from the Name box of the Caller Information list box)
   - the name or extension of the called employee

2 Click the **Close** button.
The Parked Calls dialog box closes.

Placing and retrieving calls on hold

Calls can be placed on Hold and retrieved quickly.

To put an incoming call on hold:

1 Click the Ringing Loop button.

2 Click the **Hold** button or click another Ringing Loop button.
The previous call is put on hold.
When the active call is placed on hold, the Loop button displays the words On Hold and the Loop button color changes to blue.

To place a call on Hold at an active extension:

1 With an active call on the Loop button and the employee's extension in the **Target** list box, click the **Camp On** button.
When the active call is camped on the Target list box extension (placed on hold at the Target extension), the Loop button becomes idle.

2 The camped call sends a message with tones to the employee either on or off the telephone, indicating a call is camped on their extension.

To retrieve a call on Hold:

1 Click the blue Loop button labeled **On Hold**.
The Caller Information boxes show all of the information related to this call.

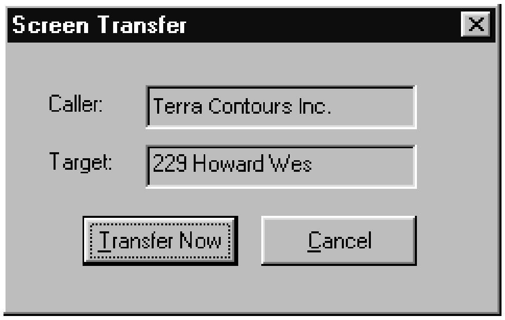
2 Respond to the call accordingly.

Screening calls

You can screen calls by asking an employee whether they want to talk to the caller.

To screen and transfer a call:

1 Click the **Screen** button.
The active call goes on hold. The Loop button changes color to blue. The extension rings and the Screen Transfer dialog box appears.



Screen Transfer

Caller: Terra Contours Inc.

Target: 229 Howard Wes

2 Ask the person being called if they can take the call. If the answer is yes click the **Transfer Now** button and the call transfers. If the answer is no follow steps 3 to 5.

3 Click the **Cancel** button.

4 Click the Loop button on which the call is being held to reconnect with the caller.

5 Process the call accordingly.

Contacting employees using Voice Call

You can use this feature as an intercom to talk directly through the speaker of the employee's telephone.

To use the Voice Call button:

1. In the **Target** list box type or enter the extension of the employee.
2. On the toolbar, click .
3. Speak to the employee through the speaker in their telephone.

Linking and Joining calls

Using Attendant Console, you can create conference calls linking or joining calls. Use the DTMF button to transfer or link calls on Centrex lines.

To use the DTMF button with an active incoming call on a Loop button:

1. On the toolbar click .
   The active incoming call is placed on hold.
2. In the **Target** list box type an outside telephone number.
3. On the toolbar click .
   The number in the Target list box is dialed out with DTMF tones on the same CO line on which the active incoming call arrived.
4. Click the **Release** button and the incoming call transfers to the outside telephone number (using the telephone company's Centrex capability). The Attendant disconnects from the call and the Loop button becomes idle.

Joining a call on hold

To Join a call on hold on a Loop button with an active call on another Loop button:

1. On the toolbar click .
2. Drag the "Join" cursor to the Loop button on which the call is held.
3. Click the Loop button holding the call.
   The two callers connect, the Attendant releases from the active call and both Loop buttons become idle.

Creating a conference call

To create a conference call to an outside number:

1. With an active incoming call on Attendant Console, in the **Target** list box type an outside telephone number.
2. Click the **Link Transfer** button.
   The Loop button label shows Active, and the number in the **Target** list box is tone dialed.
3. Click the **Link** button to set up a conference call between the incoming call, the outgoing call and the Attendant.

4 When the conference call is finished, click the **Release** button to disconnect from the call.

Note: To disable the Link Transfer button, on the **Tools** menu click Options. The **Options** dialog box appears. Select **Disable Link Transfer Option**.

Handling a callback call

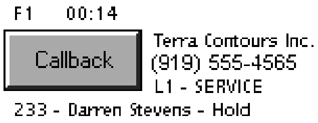
There are two types of calls that return to Attendant Console:

- an unanswered transfer call
- a call that the called person returns to you for attendant handling

Responding to a callback that an extension did not answer

A callback can be a call that is sent to an extension, or a call that is not answered and returns to you.

The callback is indicated by:



F1 00:14

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L1 - SERVICE
233 - Darren Stevens - Hold

The Callback button displays the name and extension from which the call is returned and other call related information. This lets you personalize how you handle the call.

To respond to a Callback call:

1 Click the **Callback** button.

The Caller Information list box shows the information originally displayed so that you can process the call accordingly, such as transfer to Business Communications Manager Voice Messaging, park the call, page the called person, and so on.

Responding to a callback that a called party returned

A call that the called person decides not take can be handled by you according to instructions that you or your company establish. This type of call is similar to a Callback to the attendant. The called person can press a telephone display button to give one of the following pre-set prompts:

- Hold. You ask the caller to hold for a moment.
- Assist. You send the call to the called party's assistant.

- IntAct. You tell the caller that the person they called is on the line and ask if they wish to interrupt the call.

Either Hold, Assistant or IntAct is displayed below the Callback button.

To respond to a Callback call that a called person returns:

1. Click the **Callback** button.
   The Caller Information list box shows the information originally displayed.
2. Advise the caller according to the message that appears.

To process a Hold call:

1. Advise the caller that the employee requests that they hold.
2. In the **Target** list box enter the employee’s extension.
3. Click the **Camp On** button.
   The call is camped to the called employee’s extension.

To process an Assist call:

1. Tell the caller that the employee is temporarily unable to take calls and requests that calls are routed to the Assistant extension.
2. Click the **Edit** menu and then click **Employee Information**.
   The Employee Information dialog box appears and the assistant’s number appears in the Assistant Extension box.
3. Click the **Close** button to return to the Attendant window.
4. In the **Target** list box enter the assistant’s extension number.
5. Transfer the call to the assistant’s extension number.

To process an IntAct call:

1. Tell the caller that the employee is on another call but can be interrupted.
2. If the caller agrees, enter the employee’s extension in the **Target** list box.
3. Transfer the call back to the extension.

Making a call from the attendant’s extension

As the attendant, you can call any extension in the company and any outside number. The telephone number you type in the Target list box ignores special characters such as hyphens, parentheses, blank spaces and commas. However, to reach special services such as Interactive Voice Response systems (IVR) you can type special characters (*, #, P, and W) in the Target list box and these characters can be dialed using ▦ he toolbar.

To place a call to an extension or outside number:

1. When there is no active call, type or select an extension or outside number in the **Target** list box.
2. Press `Enter` on the keyboard.
   A call is made to the extension or outside number.

To transfer a call to an extension:

1. Place or type an extension in the **Target** list box when there is an active call.
2. Press **Enter** on the keyboard.
   The call transfers to the extension.

If you select an entry in the Directory or in the Contacts box, the extension number also appears in the Target list box. If the Target is an extension, the person status icon for the person appears to the left of the Target list box. To the right of the Target the person's telephone status icon appears.

To make a call to an inside extension:

1. Make sure that the number you want to call appears in the **Target** list box. You can type the extension in directly or select it from the Directory list.
   For further information, refer to "Using the Directory Find box" on pag e46.
2. Click the **Call** button or press the **Enter** key to make the call.

To make a call to an outside number:

1. In the **Target** list box type the same digits you would dial if you were using your telephone.
2. Click the **Call** button or press the **Enter** key.

Handling calls at an employee's telephone

Attendant Console has features that let employees handle calls at their telephones.

After a call routes to an extension, a low-level tone alerts the called person they have an incoming call, even if they are on their telephone. The name of the caller appears in the display of the called party's telephone for a few seconds.

If the called person is using a Business Communications Manager two line display telephone they can use the display buttons to:

- talk to a caller
- send a call to the attendant who then asks the caller to hold
- send a call to Business Communications Manager Voice Messaging
- join a call with the current call

- send a call back to the attendant to ask the caller if they wish to interrupt the current call
- send a call back to the attendant who then routes it to an assistant attendant

Note: Press the `Next` display button to see more than the first two options that appear.

To talk to a caller:

1 Press the `Talk` display button to automatically connect with the call, or pick up the handset. If the telephone is in use, press the `Talk` display button to put the first call on hold and connect the new caller.

To send a call to the attendant who then asks the caller to hold:

1 Press the `Hold` display button.
This delivers a pre-set message to the attendant. The attendant asks the caller to hold for the called person and camps the call to the called person's extension.

2 The called person sees the call camped on their telephone and handles the call.

To send a call to Business Communications Manager Voice Messaging:

1 Press the **VM (Voice Messaging)** display button on the telephone.
The call transfers to the called person's voice message mailbox.

To join a call with the current call:

1 Press the `Join` display button to conference the caller in with your current call.
The called person can see the caller's name or Caller ID name in the display of the telephone and decide whether to include the caller in the current call.

To send a call to the attendant who then asks the caller if they want to interrupt:

1 Press the `IntAct` display button.
This delivers a pre-set message to the attendant who asks the caller if they want to interrupt the employee.

2 If yes, the attendant transfers the call back to the employee.

3 The calling party's name appears in the display of the called person's telephone for approximately 20 seconds. To answer the call that the attendant transfers back, press the **Talk** display button.

To send a call back to the attendant who then routes it to an assistant attendant:

1 Press the `Assist` display button.
This delivers a pre-set message to the attendant. The attendant tells the caller that the called person is temporarily unable to take calls and requests that they are transferred to an Assistant extension.

2. The attendant refers to the **Assistant extension** box in the **Edit Employee Information** dialog box and enters the Assistant extension number in the **Target** list box.
3. The attendant transfers the call to the Assistant extension.

Chapter 5
Maintaining caller and employee information

Attendant Console manages both caller and employee information.

Maintaining caller information

When a caller contacts your company, information about the caller from the Attendant Console database appears in the Caller Information list box of the Attendant window. Either the caller is already in the database, or other employees of the callers company may be in the database. Alternatively, the caller and the company may be new.

Creating a new caller record

New caller records are created in the following ways:

- automatically, during an active call, the first time Caller ID information is received by the Client component. You can customize the new caller record during the active call or later.
- when you create a new caller record from an existing one
- when you create a new blank caller record

Note: The caller record is not saved if you click the Release button without processing the call.

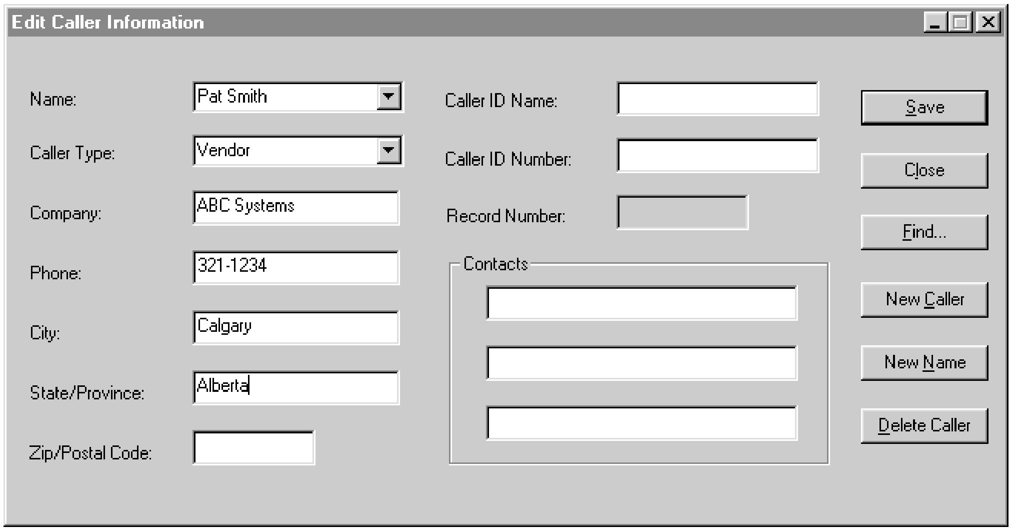
When a call comes in, Attendant Console checks the Caller ID from the telephone company to see if the number has previously called. If there is a record that the number has called before, information from the caller database appears in the Caller Information list box on the Attendant Console window. The Name list box displays the names of callers on record that are associated with the incoming Caller ID. There can be several callers from the same telephone number calling if they are employees at the same company. For more information, refer to "The Edit Caller Information dialog box" on pag e34.

If you select the name of the caller from the list, the Caller Information list box displays information about the caller.

To create a new caller record from an active call:

1. Click the Ringing Loop button to answer the incoming call.
   Information in the database about the caller appears in the Caller Information list box on the Attendant Console window.

2 In the **Caller Information** list box click **Edit**.
The Edit Caller Information dialog box appears.



Name: Pat Smith
Caller Type: Vendor
Company: ABC Systems
Phone: 321-1234
City: Calgary
State/Province: Alberta

3 Click the **New Caller** button.
This clears all the boxes in the Edit Caller Information dialog box and lets you create a new caller record.

4 In the **Name** list box, type the caller's name in the format of last name first, space, then first name.

5 From the **Caller Type** list box, select a Caller Type, either Unclassified, Personal, Employee, Vendor or Customer.

6 In the **Company** box, type the caller's company's name.

7 Click the **Save** button to save the information.
If you click the Close button without saving, the message, "Do you want to save the current record?" appears. Click the **Yes** button to save the record.

8 After you enter caller information, process the call by:

- transferring the call to the called party. Refer to "Transferring a call" on pag e47.
- placing the call on hold. Refer to "Parking, holding and screening calls" on page 48.
- transferring the call to Business Communications Manager Voice Messaging. Refer to "Transferring a call" on pag e47.
- parking the call and paging the called party. Refer to "Parking calls and paging employees" on page 48.

To create a new name caller record from an existing caller record:

1 On the Attendant Console window, in the **Caller Information** options, click the **Edit** button.
The Edit Caller Information dialog box appears.

2 Click the **New Caller** button.
This clears only the Name box in the Edit Caller Information dialog box. The other boxes do not change.

3 In the **Name** list box type the new caller's name.

4 Click the **Save** button when you are done to save the record.

To create a new caller record when there are no active calls:

1 On the Attendant Console window, in the **Caller Information** options, click the **Edit** button.
The Edit Caller Information dialog box appears.

2 Click the **New Caller** button.
A new blank caller record is created with a new Record Number assigned.

3 Type the desired information in the boxes.

4 Press the **Save** button to save the new caller record.

To create a new caller record associated with an existing Caller ID when there are no active calls:

1 On the Attendant Console window, in the **Caller Information** options, click the **Edit** button.
The Edit Caller Information dialog box appears.

2 Click the **Find** button.
The Find dialog box appears.

3 In the **Name** box type the name of another caller from the same company and click the **OK** button.

4 Click the **New Name** button.
The **Name** box clears. The other boxes do not change.

5 Type the new caller's name.

6 Click the **Save** button.
The record is saved in the database.

7 Click the **Close** button.
If you click the Close button without clicking the Save button, the Edit Caller Information dialog box closes without saving the changes.

Finding and editing caller information

You can edit caller information at any time and save the changes.

To find caller information:

1 In the Attendant Console window, in the **Caller Information** options, click the **Edit** button.
The Edit Caller Information dialog box appears.

2 Click the **Find** button.
The Find dialog box appears. Use the Find dialog box to find a caller's name in the database.

3 In the **Name** box, type the first letter or letters of the caller's last name.
If the caller's first name is used instead of their last name, type the first letter or letters of the caller's first name.

4 Click the **OK** button or press the **Enter** key.
The Find dialog box closes.

5 Any matching names appear in the **Name** list box of the **Edit Caller Information** dialog box.
If there is more than one name, a list appears below the Name box.

6 Click the caller name you want to edit.
The information about the caller appears in the Edit Caller Information dialog box.

To edit a caller's record:

1 Make sure the caller name you want to edit appears in the **Edit Caller Information** dialog box. Click the box you want to edit and make the change. Repeat if needed.

2 Click the **Save** button to save the changes to the database.

3 Click the **Close** button to close the Edit Caller Information dialog box.

Note: If you answer a call and then open the Edit Caller Information dialog box without first selecting a name from the Name box list, you must click the **Edit** button twice.

To delete a caller record:

1 In the Attendant Console window, in the **Caller Information** options, click the **Edit** button.
The Edit Caller Information dialog box appears.

2 Make sure the caller name you want to delete appears.

3 Click the **Delete Caller** button.
The record that appears in the Edit Caller Information dialog box is deleted from the database.

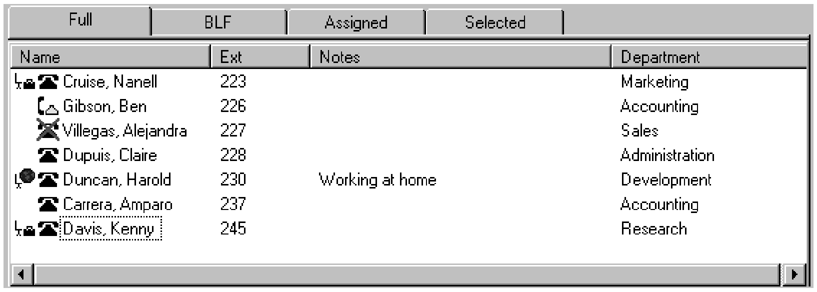
Maintaining employee information

When Attendant Console is installed, employee information is provided by the Business Communications Manager base unit. This information appears in the Directory list box in the bottom center of the Attendant Console window.

The Directory list box has four tabs that display lists of employees. They are the Full, BLF (Busy Lamp Field), Assigned and Selected tabs. For further information, refer to "Search and edit functions in the Directory options" on page 37.

Using the Directory list

Information in the Directory list appears in ascending order (1 to 9 or A to Z). Sorting is based on the contents of one column at a time. If there are different forms of information in the same columns, priority is given in the following order: no information entered (blank), numeric, then alphabetic. For example, if you sort a Name column that contains both names and extension numbers, the extension numbers appear before the names.



Name	Ext	Notes	Department
Cruise, Nanell	223		Marketing
Gibson, Ben	226		Accounting
Villegas, Alejandra	227		Sales
Dupuis, Claire	228		Administration
Duncan, Harold	230	Working at home	Development
Carrera, Amparo	237		Accounting
Davis, Kenny	245		Research

You can sort Directory information by column by clicking any column heading. For example, to sort the directory by extension, click the Ext column heading. The listing appears with the extensions in numerical order.

To sort a column of information in the Directory:

1. Click the tab you want to sort, either **Full**, **Selected** or **Assigned**.
   Information in the BLF tab view appears in the same order you select for Full view.
2. Click the column heading you want to sort, either **Name**, **Ext**, **Notes** or **Department**.

Finding an employee record

You can search for an employee by name, by department or by an individual within a department.

You can search by an employee's name two different ways:

- on the Edit Employee Information dialog box click the Edit button and then click the Find button
- on the Attendant Console window, in the Directory list box, click the Find button

To search by name:

1. In the Attendant Console window, in the **Directory** options, click the **Edit** button.
   The Edit Employee Information dialog box appears. For more information, refer to "The Edit Employee Information dialog box" on page 38.
2. Click the **Find** button.
   The Find dialog box appears.

3 In the **Name** box, type the first letter or letters of the employee's last name.
If the employee's first name is used instead of their last name, type the first letter or letters of the employee's first name.

4 Click the **OK** button or press the **Enter** key.
The Find dialog box closes. Any matching names appear in the Name box of the Edit Employee Information dialog box.

To search by name on any Directory list box on the Attendant window:

1 In the **Find** box on the Attendant Console window type the first letter(s) of the person's last or first name, according to how names are listed in the Directory list's Name column.

2 Click the **Find** button.
Any names that match the letter(s) you enter appear in a list in the Full tab Directory view.

To search by department:

1 In the **Directory** options, click **Department** list box arrow.
A list of the departments associated with extensions appear in the list. The name of the department for each extension appears in the Edit Employee Information dialog box.

2 Select the department name from the list and the department name appears in the Department box.

3 Click the **Find** button.
Any extensions that match the department appear in a list in the Full tab Directory view.

Note: A department search takes priority over a name search.

To search for an individual in a department:

1 In the **Department** box select a department.

2 In the **Find** box type the person's name.

3 Click the **Find** button.
Any extensions that match the name in the department appear in a list in the Full tab Directory view.

Resetting the Full tab view

You can reset the Full tab view to the default display.

To reset the Full tab view:

1 In the **Directory** options, click the Show All button.
The Full tab view shows the extensions, names, notes and department information.

2 Click the **Show All** button to return to the Directory view after you perform a search.

Editing employee information

You can edit employee information by adding or changing an extension, changing the person status of an extension or by creating a new name for an extension.

To add or change an extension:

1. In any Directory tab view (Full, BLF, Selected or Assigned), click the extension in the **Directory** list for which you wish to change or add information.
2. In the **Directory** options, click the **Edit** button.
   The Edit Employee Information dialog box appears. Use this dialog box to create or edit information in the employee database.
3. Enter the new information in any of the boxes that can be edited.
4. Click the **Save** button.
   The changes are made to the database and to the employee’s extension in the Directory.
5. Click the **Close** button to close the Edit Employee Information dialog box.

To change the person status of an extension:

1. In any of the Directory views (Full, BLF, Assigned or Selected), click the extension.
2. From the **Status** list box select **None**, **Not at desk** or **Out of office**.
   The status you choose appears beside the name.

There is no icon for None. Instead, a blank space appears next to the person’s telephone status if you select it. If you select Out of office the Out of office icon appears . If you select Not at desk the Not at desk icon appears .

Do not type in the Status box.

Creating a new name for an extension

You can change the name of an employee assigned to an extension.

To create a new name for an extension:

1. In the **Directory** options, click the **Edit** button.
   The Edit Employee Information dialog box appears.
2. Click the **New Name** button.
3. Type the new employee’s name.
4. Click the **Save** button when you are done.

Using the Make Caller button

Use this function if an employee calls from a customer’s office.

To assign the name of an employee to a caller record:

1 In the **Directory** list, select the employee's extension or type the employee’s extension number in the **Target** list box.

2 Click the **Make Caller** button.
The name of the employee is assigned to the caller record and is not saved as a customer record.

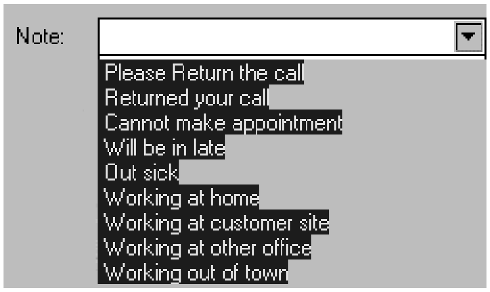
Adding notes to employee records

You can add a note to an employee record by selecting a note from a list or typing a personal note. The note appears in the Notes column under Directory in the Attendant window.

To select from the list of notes:

1 Click an extension number in the **Full**, **Assigned** or **Selected Directory** views.

2 From the **Note** list box, click the applicable note.
The note appears in the Directory list’s Notes column.


Note:
Please Return the call
Returned your call
Cannot make appointment
Will be in late
Out sick
Working at home
Working at customer site
Working at other office
Working out of town

To type a note:

1 Click an extension number in the **Full**, **Assigned** or **Selected Directory** views.

2 In the **Note** list box type a note.

3 Press the **Enter** key.
The note appears in the Directory list’s Notes column.

Note: To delete a Note, delete the information in the **Note** list box and then press the **Enter key**.

To save employee edit changes:

1 On the **Edit Employee Information** dialog box click the **Save** button.
The changes made to the boxes in the Edit Employee Information dialog box for the employee highlighted in the Directory list are saved to the database. After you click the Save button, the Edit Employee Information dialog box remains open.

To close the Edit Employee Information dialog box without saving changes:

1 Click the **Close** button.
The Edit Employee Information dialog box closes.

➡ **Note:** If you click the Close button without clicking the Save button, the Edit Employee Information dialog box closes without saving the changes.

Chapter 6
Generating reports

Attendant Console collects information about incoming calls and tracks how calls are processed. Use the information from the Reports component to help spot trends and prevent problems.

You can use the caller-related information in Reports to:

- increase sales opportunities
- improve productivity
- reduce expenses
- streamline operations

For example, the Calls by Customer report shows how callers from your company's top customers are handled. It shows if calls are handled by employees or are routed to Business Communications Manager Voice Messaging.

Report types

There are three report types:

- Calls by Customers
- Calls to Employees
- Extension Directory

Calls by Customers report

The Calls by Customers report shows how your employees handle calls from your customers. Each employee report can identify as many customers as necessary. The Calls by Customers report shows:

- the number of calls taken by the employee
- the number of calls routed to Business Communications Manager Voice Messaging
- the number of calls handled by others
- the total calls from each customer

Calls to Employees report

The Calls to Employees report shows the type of calls employees receive over a defined time period. This report can spot caller abuse such as too many personal calls, and misdirected calls such as calls from customers routed to the wrong person or department. This report lists the type of call across the top and names of employees down the left side. Each Caller Type has a column for the number of calls and percent. The total of all calls and percent are shown separately.

Extension Directory report

The Extension Directory report lists the employees in the Attendant Console database and the information in their call record.

Using the Reports window

To open the Reports window:

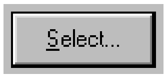
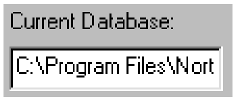
1. On the **Attendant** window click **Tools** and then click **Reports**.
   The Reports window opens.

The Reports window contains the Database, Information, Period, Employees and Customers list boxes and a report viewing area. The Reports window menus are File, Edit, View and Help.

Use the Create Report, Page <, Page > and Print buttons to define the type of report you create. You can manipulate the preview image after you create a report.

Database box

The Database box contains information on selecting a database.

	Click the Select button to open the Open dialog box. Select a Microsoft Access database. For more information about databases and how to locate the database (.mdb) file, refer to "Loading the database" on page 73.
 Current Database: C:\Program Files\Nort	Type the path name of an Attendant Console database in the Current Database box.

Information list box

The Information list box contains the report type information.

Report Type:	The Report Type is available if you type a valid Microsoft Access database in the Current Database box.
Description	If you select a report type, a description of the report type appears in the Description area.

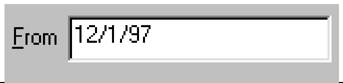
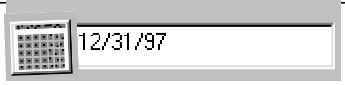
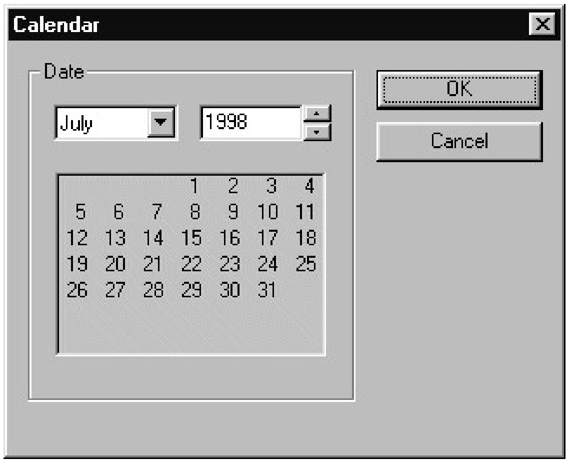
Period list box

The Period list box is available if:

- you select a valid database

and

- you select a report type that requires you to define a report period.

<table>
<tr><td> </td><td>opens the One Week dialog box. This dialog box lets you specify a report period with a duration of one week (Sunday through Saturday).</td></tr>
<tr><td> </td><td>opens the One Month dialog box. This dialog box lets you select a one-month report period.</td></tr>
<tr><td> </td><td>shows the date of the beginning of the report period. The boxes change to reflect the dates in the Month, Week, and Calendar buttons. The From date must be earlier than the To date.</td></tr>
<tr><td> </td><td>opens the Calendar dialog boxes that you use to set the From and To report period dates. The Calendar dialog box resembles the Calendar dialog boxes in other Windows-based programs. The Calendar buttons are available if you select a valid database and you select a report type that requires you to define a report period.


Calendar
Date
July
1998
OK
Cancel
1 2 3 4
5 6 7 8 9 10 11
12 13 14 15 16 17 18
19 20 21 22 23 24 25
26 27 28 29 30 31

</td></tr>
</table>

Employees and Customers options

Use these options to define the customers or employees who will be the subject of the report..

The Employees and Customers options contain:

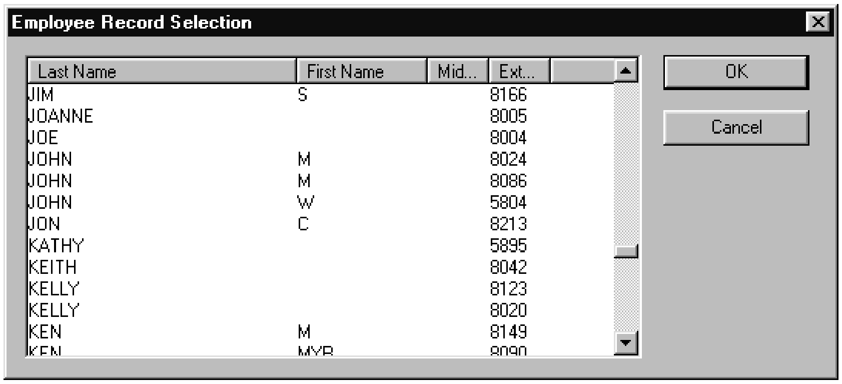
<table>
<tr><td> </td><td>generates a report that includes data for members of the selected category (Employees or Customers).</td></tr>
</table>

● Select	generates a report that includes data for the members in the list box. If you click the Select option, the button under the selection list box, either Customer or Employee, is available so you can make your selection.
list box	displays information if you select a subset of the customers and employees in your database. If you select All, the list box is blank. If the list is long enough, you can scroll to view its contents. You cannot edit the list box by typing in it. Use the buttons under the list box to change the contents of the list.
Customer and Employee options	accesses directories. The Employee and Customer options are active if you choose the Select option. Click these options to display either the Employee or Customer Record Selection dialog box, from which you can make your selection.

Note: These options are available only if you select a valid database, a report period, and a report type that uses the category Employees or Customers.

Customer and Employee Selection dialog box

From the Customer and Employee Selection dialog boxes, you can choose the Employees or Customers to include in a report.



Last Name	First Name	Mid...	Ext...
JIM	S		8166
JOANNE			8005
JOE			8004
JOHN	M		8024
JOHN	M		8086
JOHN	W		5804
JON	C		8213
KATHY			5895
KEITH			8042
KELLY			8123
KELLY			8020
KEN	M		8149

The program records the items you selected from this dialog box the last time you created a report. When the dialog box opens, the items you selected the last time are highlighted.

Creating and viewing reports

Use the Reports component to generate reports for analyzing telephone use in your company. This section describes the steps required to generate reports:

- select a database
- select a report type
- select a report period

- select employees and customers
- create and preview the report
- print the report

Loading the database

Attendant Console stores information in a database about your company’s telephone use. This database is used to generate the different types of reports. In most cases you use the database installed on the Business Communications Manager base unit system. However, if you make backups of the database for archiving purposes, Reports can also use these backups. If you are generating reports from a PC that does not have the database stored, locate the database on the Business Communications Manager base unit through Network Neighborhood. Check with the System Administrator to ensure that the database is a shared file.

To load the database:

1. On the **Reports** window, at the **Database** option, click the **Select** button.
   The Open dialog box appears.
2. In the **File name** box, type:
   \\"name of server"\consoleservicedb
   where "name of server" is the name of your Business Communications Manager base unit. If you do not know the name of the server, ask your System Administrator.
3. Click the **Open** button.
4. Click **ConsoleService.mdb**
5. Click the **Open** button.
   The database loads to your PC and the database path appears in the Current Database box.
6. Click the **Close** button to return to the Attendant window.

Selecting a report type

After you load a database, select the type of report.

To select a report type:

1. From the **Report Type** list box select your report.

Setting the report period

Some reports require a report period. The report period defines the time span for which data is considered. If you choose a report type that does not require a report period, the Period list box is unavailable. The report period begins on the From date and ends on and includes theTo date.

To enter the From and To dates:

1. In the **From** box type the date.
   The following are acceptable date formats:
   - June 5, 1997
   - 6/5/1997
2. Press the **Enter** key.
3. In the **To** box type the date.
4. Press the **Enter** key.

Note: An error message appears if you type a date in an unrecognized format or if you type a date that does not exist.

To select a report of one week:

1. Click the **One Week** button.
   The One Week dialog box appears.
2. In the **month** list box, choose the month that the desired week starts or ends.
3. In the **year** list box, select the year the week occurs in.
   You can type the year box or use the arrows.
4. In the list of weeks select a week and click the **OK** button, or double-click the desired week.
   After you select a week, the start and end dates of the week appear in the From and To boxes.

To specify a report of one month:

1. Click the **One Month** button.
   The One Month dialog box appears.
2. In the **month** list box, choose the desired month.
3. In the **year** select the desired year either by typing it or selecting it with the arrows.
4. Click the **OK** button to accept the month, or click the **Cancel** button to cancel your Report Period selection.

If you select a month, the start and end dates of the month appear in the From and To boxes. Dates for February automatically account for leap-years, centuries, and millennia.

To cancel a selection, press the **Esc** key or click the **Cancel** button.
The Period list box information does not change.

Clearing a date

You can clear a date by deleting the contents of the box. A cleared box does not count as a date, and does not restrict the range of the other date.

➡ **Note:** The To and From boxes are active if you select a valid database and you select a report type that requires you to define a Report Period.

Selecting employees and customers for the report

Some types of reports, especially those that concern call data, let you select sets of employees, customers, or both. The information for the set you select is summarized in the report. Reports have categories that are appropriate to the type of report that you chose. If your report type does not need or allow these selections, the Employees and Customers options are unavailable.

To select employees or customers:

1. Click either the **Employees** or **Customers** option.
   The Employee or Customer Record Selection dialog box appears.

➡ **Note:** The first time you click one of these options after you connect to a database, there is a pause while Reports builds the directory. After Reports builds the directory, if you click an option, there is a pause while Reports opens the dialog box. If a directory is large, the pause can be several seconds long. After the pause, the Selection dialog box appears.

2. The Selection dialog box contains a list of Employees or Customers. The list of Customers has a single column that lists the Customer's Company Name. The list of Employees has several columns that list the employee's last, first and middle names, and telephone extension. You can resize the columns by dragging the column header edges in the bar at the top of the list.
3. You can choose either a single item or multiple items. Items that you select appear with a blue background behind their boxes. Choose a single item by clicking it. Choose multiple items by pressing the Control key while you click the items you want. You can select up to 100 items from the list. If you require more than 100 items, create several reports with different selection lists, or click the **All** button.
4. Click the **OK** button.
   The Customer or Employee Record Selection dialog box closes and the Selection list box displays the items you selected from the dialog box.

Create Report button

When you have entered all the data needed to create a report, the Create Report button is available.

To create a report:

1 Click the **Create Report** button.
This starts the report generation process. The Reporting animated icon appears to show that the report is running. The icon stops when the report is complete.

➡ **Note:** You cannot close the application while it is running. If you need to quit the application while a report is running, you can do it from the Close Programs dialog box in the Windows Task Manager. Refer to Windows Help for information on how to force programs to quit.

---

2 After the report is complete, it appears in the Report Viewing area. The Create Report button is unavailable again, to show that the report is created. The Report controls are unavailable and the keyboard functions only in the Report Viewing area. You can re-access the Report controls by pressing the Tab key.

Viewing the report

After you create a report, the Page > and Page < buttons are available. The Page > button shows the next available page of the report, if there is one, in the report view. The Page < button shows the previous page of the report, if there is one.

The page number of the current page appears in the bottom right corner of each page of the report.

You can also change the displayed page from the keyboard.

To change the displayed page from the keyboard:

1 Ensure the keyboard is active in the Report Display area, in the lower half of the Attendant Console Reports window. This is set automatically after creating a report, but can also be done by pressing the **Tab** key to move through the Report settings.

2 Press **Ctrl** + **Page Up** to view the previous page, or **Ctrl** + **Page Down** to view the next page.

Printing a report

When a report is in the Report Viewing area, the Print button is available.

To print a report:

1 Click the **Print** button.
The report prints to the default printer. You can change default printer the from the Printers folder. Access the Printers folder from the Windows Start menu or Control Panel. Refer to Attendant Console Help for further information.

2 Choose the pages and number of copies of the report to print.

3 Click the **OK** button and the report prints
or
click the **Cancel** button to cancel printing the report.

Note: If you change a report parameter in one of the report controls, the Create Report button is available and the Print button is unavailable. Do not change any report parameters before you print the report. If you change a report parameter, you must regenerate the report before you can print it.

Glossary

Assistant attendant

The assistant attendant is the telephone attendant who provides call coverage for specific employees.

Backup attendant

The backup attendant receives calls when the main attendant is not available. The main attendant uses the Out button on the Attendant main window to direct calls to the backup attendant.

BLF (Busy Lamp Field)

Busy Lamp Field is one of the Directory list tab views. It displays the phone status and extensions of employees.

CF

Call Forward.

Caller ID

Caller ID, known as CLID or Calling Line Identification, is provided by your telephone company. If your company subscribes to Caller ID, the caller name and number are displayed on incoming calls.

CO

Central Office.

Destination extension

The destination extension is the person's extension to which a caller (or attendant) attempts to connect.

DND

Do not disturb.

DTMF - Dual Tone Multi Frequency

DTMF is the sound emitted when telephone buttons are pressed.

Attendant Console

Attendant Console is a Windows-based software product that provides call management and call activity reporting capability to a business.

Business Communications Manager base unit

The telephone system that Attendant Console works with.

External call

An external call is a call that originates from outside your company's telephone system.

Hookflash

The signal that occurs when a telephone goes on-hook followed by off-hook.

Hunt Group

A Hunt Group is a group of telephones that can be called by a single number. Hunt Groups are configured in your Business Communications Manager base unit.

ID

Identification.

Internal call

An internal call is a call, such as a call from another employee's extension, that originates from your company's Business Communications Manager base unit.

LAN

Local area network.

Main attendant

A main attendant is the telephone attendant who is primarily responsible for managing a company's incoming calls. The main attendant can have other attendants.

Networked model

In a networked model the Attendant Console main attendant's PC is connected to one or more additional attendant PCs through a network.

Overflow attendant

The overflow attendant receives incoming calls when there are more than six active calls at the main attendant's PC.

PC

Personal computer.

Server component

The Attendant Console server program supports the Client component residing in the PC.

Shared system

In an Attendant Console shared system the Business Communications Manager base unit is shared by two or more companies.

Stand-alone model

A stand-alone model is a Attendant Console system in which one attendant manages a business's incoming calls. There are no assistant attendants, backup attendants or overflow attendants in a stand-alone model.

Target extension

A target extension is the extension number to which you are directing a call.

VM

Voice mail or voice message mailbox.

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