



# **Avaya Softconsole™**

Release 1.5

Quick Reference

555-233-773  
Issue 2  
February 2003

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# Quick Reference

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## Logging In and Exiting

This booklet contains basic instructions for using Avaya Softconsole™ Release 1.5. For detailed instructions, or for information on using the Softconsole application in Centralized Attendant Service (CAS) and Distributed Communications Systems (DCS) environments or alternative configurations, refer to the *Avaya Softconsole™ Release 1.5 Attendant's Guide*.

The following procedures explain how to access Softconsole. To determine which of these login procedures (if any) you must use, see your system administrator.

### Start a Softconsole session

1. Perform one of the following steps:
  - At your Desktop window, double-click on the Softconsole icon.
  - From the Start menu, select **Programs>Avaya>Avaya Softconsole>Avaya Softconsole**.

If you are not required to enter a login name or password, the Softconsole window opens. Otherwise, go to Step 2.

2. Enter your login name and password (if applicable).
3. Press **ENTER**, or click the **OK** button.

#### NOTE:

If you are working in Internet Protocol (IP) mode, you must also log into the server before you can use Softconsole. See "[Log into IP mode](#)" on page 2.

## Identify yourself to Softconsole

If another attendant has been working in a Softconsole session at your computer, you must identify yourself to Softconsole before you can begin your session.

1. From the File menu, click **Attendant Login** to display the Softconsole Attendant Login dialog box.
2. Enter your login name and password.
3. Press **ENTER**, or click the **OK** button.

## Exit a Softconsole session

1. Be sure that no calls appear on the console.
2. From the File menu, click **Exit**.

If you are working in IP mode, you are automatically logged off the server.



### **NOTE:**

If the console detects any calls in progress, a warning dialog box is displayed. Click the **Cancel** button in the dialog box to return to your Softconsole session without disconnecting the calls.

## Log into IP mode

If you are working in IP mode, you must log into the server. If you are not logged into the server, you will be unable to handle calls via Softconsole.

1. Start Softconsole according to the procedure in "[Start a Softconsole session](#)" on page 1. If the Login dialog box is not displayed, select **Log In>Log In** from the File menu.
2. At the Login dialog box, enter the following information in the appropriate boxes:
  - your assigned extension
  - your password
  - whether you want to use the Road Warrior configuration (voice over IP) or the Telecommuter configuration
  - the address of the server
  - the bandwidth setting (Road Warrior configuration only)
  - the telephone number of the telephone you will use to hear and speak to the other party on a call (Telecommuter configuration only)
3. If you want the application to save your password for the next time you log into the server, check the **Remember password for next login session** check box.

4. If you want the application to try to log into the server automatically the next time you start Softconsole, check the **Automatically log in if possible when application restarts** check box.
5. Click the **Log in** button.

 **NOTE:**

Depending on your configuration, an additional dialog box may appear prompting you to verify the connection by making a test call. Click the **OK** button, and then make a test call.

### Log off IP mode

To log off the server in IP mode without closing Softconsole:

1. Be sure that no calls appear on the console.
2. From the File menu, click **Log In**.  
A submenu appears.
3. Click **Log Off**.

 **NOTE:**

If the console detects any calls in progress, a warning dialog box is displayed. Click the **Cancel** button to return to your Softconsole session without disconnecting the calls.

### Get help

To get immediate on-line help, press **F1**.

## Basic Call Handling

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### Hot Key Summary

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“Hot keys” are specific key combinations that can be programmed by your Softconsole administrator for particular toolbar and menu options. For example, pressing ALT-M allows you to send email to a selected directory entry. If hot keys have been programmed for your Softconsole, you can substitute the appropriate hot key in any of the procedures provided in this booklet. You may find it useful to record additional hot keys programmed for your system in the table below.

Hot Key	Assigned Function
<b>F3</b>	Starts a new call
<b>F4</b>	Picks up a call
<b>F5</b>	Transfers a call
<b>F6</b>	Conferences a call
<b>F7</b>	Adds a call to a conference
<b>F8</b>	Holds a call
<b>F9</b>	Drops a call
<b>F10</b>	Cancels
<b>F11</b>	Ends a conference call
<b>ALT-M</b>	Opens your email application
<b>ALT-S</b>	Shows the line status of a selected directory entry
<b>ALT-1 through ALT-6</b>	Allows direct keyboard selection of specific call appearances



## Answer a call

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1. Do one of the following:
  - If the red Pickup Indicator outlines the call appearance, press **F4 (Pickup)**.
  - Press **ALT** and the key (1 to 6) corresponding to the appropriate call appearance.
  - Click on any part of the call appearance, *except* the information button or comment area.
2. Assist the caller as necessary.

### NOTE:

To answer a second call, press **F8 (Hold)** to place the current call on hold. Then, follow steps 1 and 2.

## Call an extension

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1. Do one of the following:
  - Press **F3 (New)**. Enter the extension number.
  - Press **ALT** and the key (1 to 6) corresponding to an available call appearance. Enter the extension number.
  - Click anywhere on the call appearance *except* the information button or comment area. Enter the extension number.
  - Left-click on the Direct Extension Select/Busy Lamp Field (DXS/BLF) cell corresponding to the extension.
  - Locate the extension in the appropriate Softconsole directory. Press **ENTER** to dial the extension for the selected entry.
2. If the extension is busy or does not answer, press **F9 (Release)** and try again later.

## Call an outside telephone number

1. Do one of the following:
  - Press **F3 (New)**. Enter the appropriate trunk access code.
  - Press **ALT** and the key (1 to 6) corresponding to an available call appearance. Enter the appropriate trunk access code.
  - Click the appropriate **Trunk Group Select** button (or select the trunk group from the Trunk menu).
2. When you hear dial tone, enter the telephone number.
3. If the telephone number is busy or does not answer, press **F9 (Release)** and try again later.

## Place a second call (Auto Hold)

To place a second call while already active on a call (when Auto Hold is administered for your Avaya server):

1. Do one of the following:
  - Press **F4 (Pickup)** to select the next available call appearance.
  - Press **ALT** and the key (1 to 6) corresponding to an available call appearance.
  - Click on any part of an available call appearance, *except* the information button or comment area.
2. Dial the extension or telephone number (including the trunk access code).
3. If the called party is busy or does not answer, press **F9 (Release)** and try again later.

## Place a second call

To place a second call while active on a call (when Auto Hold is not administered for your Avaya server):

1. Press **F8 (Hold)** to place the current call on hold.
2. Select an available call appearance.
3. Enter the telephone number (including the trunk access code).
4. If the called party is busy or does not answer, press **F9 (Release)** and try again later.

## Place the current call on hold

To hold the current call, press **F8 (Hold)**.

## **Release a call**

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To release an active call, press **F9 (Release)**.

## **Retrieve a held call**

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To retrieve (pick up) a held call, do one of the following:

- Press **F4 (Pickup)** on the call appearance.
- Press **ALT** and the key (1 to 6) corresponding to the appropriate call appearance.
- Click anywhere on the associated call appearance, *except* the information button or comment area.

## **Type comments about a call**

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To type temporary notes while active on a call:

1. Click in the comments area of the call appearance.
2. Using the keyboard, enter a comment about the current call. The comment remains until you delete it or release the call.
3. To exit the comments area, do one of the following:
  - Click outside the comments area on the call appearance.
  - Click on a feature, trunk, or Hundreds Group button.
  - Select a new directory.

## Conferencing Calls

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### Set up a conference call

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**NOTE:**

The Attendant Conference feature is not available in the CAS environment.

1. Answer or place the call that will be conferenced with up to five other parties.
2. Press **F6 (Conference)**.
3. Enter the extension or telephone number (including the trunk access code).
4. Do one of the following:
  - If the called party has answered and wants to join the conference call, press **F7 (Add)**.
  - If the called party does not answer or declines to join the conference call, press **F10 (Cancel)**.

### Remove yourself from a conference call

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To remove yourself from a conference call without affecting the connected parties, press **F9 (Release)**.

### End a conference call

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To end a conference call for all connected parties:

1. Press **F11 (End Conf)** on the call appearance associated with the conference call.
2. When prompted by the dialog box, press **ENTER** or click the **OK** button.

## Transferring Calls

### Transfer an incoming call (Auto Transfer)

You can use this method only when the Auto Transfer feature is administered for your Softconsole:

1. Answer the incoming call, and press **F5 (Transfer)**.
2. Dial the extension (using the keypad, DXS/BLF, or Softconsole directory).

### Disable Auto Transfer for the current call

To disable the Auto Transfer feature for the current call so that you can announce the call:

- Press **SHIFT** while dialing the number on the keypad.
- Press **SHIFT-ENTER** while dialing the number from the Softconsole directory.
- Press **SHIFT** and click while dialing from the Busy Lamp Field.

### Transfer an incoming call (Supervised)

1. Answer the incoming call, and press **F5 (Transfer)**.
2. Dial the extension (using the keypad, DXS/BLF, or Softconsole directory) or telephone number (including the trunk access code).
3. When the called party answers, announce the call.
4. Do one of the following:
  - If the called party accepts the call, press **F9 (Release)**.
  - If the called party declines the call, press **F10 (Cancel)** to reconnect with the caller. Take a message (if necessary), and press **F9 (Release)**.
  - If the line is busy or no one answers, press **F10 (Cancel)** to reconnect with the caller. Take a message (if necessary), and press **F9 (Release)**.

## Using the Softconsole Directory

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### Select a directory

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The directories you can access and the activities you can perform in any directory depend on the privileges your Softconsole administrator has assigned to you. If more than one directory is available to you, the icon corresponding to the active directory is highlighted on the directory panel and a checkmark appears next to the appropriate directory name on the Directory menu.

To select another directory, press **ALT** and the key corresponding to the appropriate directory name. Otherwise, click on the icon associated with the directory.

### Find information in the directory

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1. In the **Search By** box, locate and click on the field name associated with the type of search you want to perform.
2. In the **Search For** box, type the string of text that you want Softconsole to locate.



**NOTE:**

If you are using an LDAP view, the **Search** button appears when you type information in the Search For box. The **Search** button indicates that Softconsole is in “quick search” mode. By default, Softconsole is in “quick search” mode when you open an LDAP view. You must click the **Search** button to start the search.

Softconsole locates the first record that matches the information you have entered thus far.

To cancel a search that you started (that is, the **Search** button is displayed), click on the scroll bar or select a record.

3. If more than one entry is displayed as a possible match, click on the appropriate entry.

### Add an entry to the directory

1. Do one of the following
  - Select **Add** from the Directory menu.
  - On the Directory toolbar, click the **Add** button.
2. In the Add Directory Entry dialog box, enter the information for the first field.
3. Press **TAB** to move to the next field.
4. When you finish entering information in all the fields for this new record, press **ENTER** or click the **OK** button.

### Change information in the directory

1. Locate the entry you want to edit.
2. Do one of the following:
  - Select **Modify** from the Directory menu.
  - On the Directory toolbar, click the **Modify** button.
3. In the Modify Directory Entry dialog box, change the necessary information.
4. To save the changes, press **ENTER** or click the **OK** button.

### Delete an entry from the directory

1. Locate the entry you want to delete.
2. Do one of the following:
  - Select **Delete** from the Directory menu.
  - On the Directory toolbar, click the **Delete** button.
3. In the warning dialog box, press **ENTER** or click the **Yes** button to confirm that you want to delete this entry.

## Display detailed view of directory entries

To open a detailed view of directory entries as they are highlighted:

1. Do one of the following:
  - Select **Show details** from the Directory menu.
  - On the Directory toolbar, click the **Show Details** button.

The detailed view (showing all the information associated with an entry) appears in the lower part of the directory panel. If you can dial the numbers associated with any of the fields displayed, a speed dial button appears on the right side of the field.

2. To hide the detailed view, click **Show Details** again.

## Make notes in a directory entry

1. Locate the entry for which you want to make notes.
2. Do one of the following:
  - Select **Modify** from the Directory menu.
  - On the Directory toolbar, click the **Modify** button.
3. In the Modify Directory Entry dialog box, move to the Notes area using the mouse or **TAB** key.
4. Enter the necessary information in the Notes area.
5. Click the **OK** button to save the note.

## Place a call using the directory

You can place a call directly from the Softconsole directory to any entry only when no other call is active on the Softconsole.

1. Locate the person listed in the Softconsole directory.
2. With the directory entry highlighted, do one of the following to place the call:
  - Press **ENTER**.
  - Double-click on the selected record.
  - Click the **Dial** button in the Detailed View area.
3. If the called party is busy or does not answer, press **F9 (Release)** and try again later.



## Send email using the directory

1. Locate the entry for the person to whom you want to send email.
2. Do one of the following to open your desktop mail application:
  - Press **ALT-M**.
  - Select **Send e-mail** from the Directory menu.
3. In the composition window, enter the message.



### **NOTE:**

If the directory entry contains a valid email address, that address is automatically inserted in the "To" field of the email window. Otherwise, you must enter the email address.

4. Click the **Send** button to send this message.

## View line status for a selected entry

While you are viewing a directory entry for an extension, press **ALT-S** to view the line status for this entry.

The background color of the directory entry displayed changes to reflect the color in the BLF cell corresponding to this extension.

