

Lucent Technologies
Bell Labs Innovations



Windows Operator Console User's Guide V3.1



By Lucent Technologies
38HSC00001SAT - Issue 7 (7/99)

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The Windows Operator Console

Introduction

The Windows Operator Console is a PC system for efficient and effective handling of multiple incoming calls. It provides you with a wide range of call handling functions, whilst displaying information about callers and their desired transfer extension.

The console works on SDX and INDeX telephone systems that provide a CTI link. Currently this covers systems running Level 5.1+ software. The CTI link allows computer systems and the telephone system to exchange information and instructions.

The Console Terminal

Another phone, working in parallel with the console, provides the operator's speech path. You can use any DT or FT phone, with a handset or headset as preferred.

Lucent Technologies designed the FT-6 phone specifically for use with the console. It uses a headset connection, has a small footprint and supports all the features of an FT-4. Otherwise use FT-3/4 or DT-3/4/5 phones as these have full displays and pluggable handset/headset lead sockets.

Using Windows

The Operator's Console is a Windows program and so knowledge of Windows is useful to get the best out of the console. The booklet "Getting Started With Windows" (supplied with Windows) provides a detailed introduction for new users.

For details of Windows, DOS and PC training courses contact Lucent Technologies Training on 01707 392200.

Running Other Programs

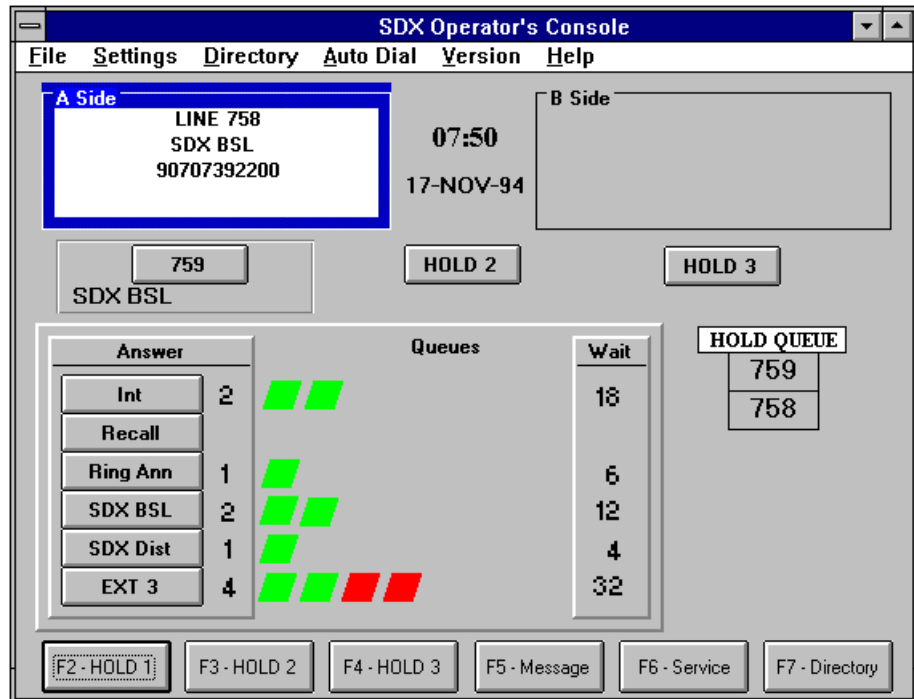


WARNING:

Lucent Technologies designed the console as a dedicated system, continuously monitoring the telephone system for calls. Running the console in parallel with Windows programs other than those specified by Lucent Technologies invalidates the warranty and support of the console.

The Operator's Console Screen

The picture below shows the important features of the console screen. You can customise the console screen and operation in many ways (see *page 23*).

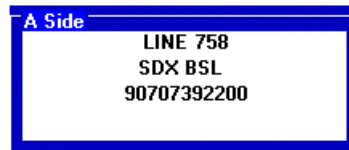


All the key symbols on the screen have keyboard equivalents. This guide concentrates on using the keyboard, though you can click on the screen if preferred.

- "A-Side & B-Side Displays" on page 5.
- "Call Queues" on page 6.
- "Hold Queue & Hold Bays" on page 7.

A-Side & B-Side Displays

When you answer a call, the console displays information about it in the **A-Side** box. This includes information about the line on which the call arrived. For external calls arriving over a network this will include both the original exchange line and the network line details.



After answering a call, dialling the number to which you want to transfer the call displays details about that number in the **B-side** box.

The **A-Side** and **B-Side** box surround colour indicates the call status:

- **Blue** = Connected and talking to you.
- **White** = Connected but not talking to you or extension unobtainable.
- **Green** = Extension free.
- **Red** = Extension busy.

Call Queues

The console presents each call in one of several call queues. Which queue depends on the type of call and the line on which the call arrived. New calls appear as a green block. If the call waits longer than a set time the block changes colour from green to red (the time delay is set on the telephone system).

- **Int:** Internal calls to the operator.
- **Recall:** Calls held or unanswered for a long time eventually recall to this queue.
- **Ring Ann:** Calls waiting for an announced transfer to a busy extension, appear here when the extension they require becomes free.
- **EXT 1, EXT 2, EXT 3:** External call queues. You can change the external queue labels (see page 25).

Answer		Queues	Wait
Int	2	■ ■ ■	18
Recall			
Ring Ann	1	■	6
EXT 1	2	■ ■ ■	12
EXT 2	1	■	4
EXT 3	4	■ ■ ■ ■	32

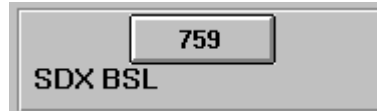
The total number of calls in each queue appears next to the on-screen **Answer** buttons. The column labelled **Wait** shows the time of the longest waiting call in each queue.

Hold Queue & Hold Bays

The console can hold calls in two ways. Both display the line number and allow other extensions to pick-up those calls by dialling that number.

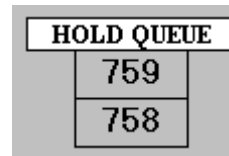
– **Hold Bays:**

The console has 3 Hold Bays. Each holds just one call, but displays the full call information including any call annotation added.



– **Hold Queue:**

The Hold Queue can contain several calls, but only displays the line numbers of the 6 longest held calls.

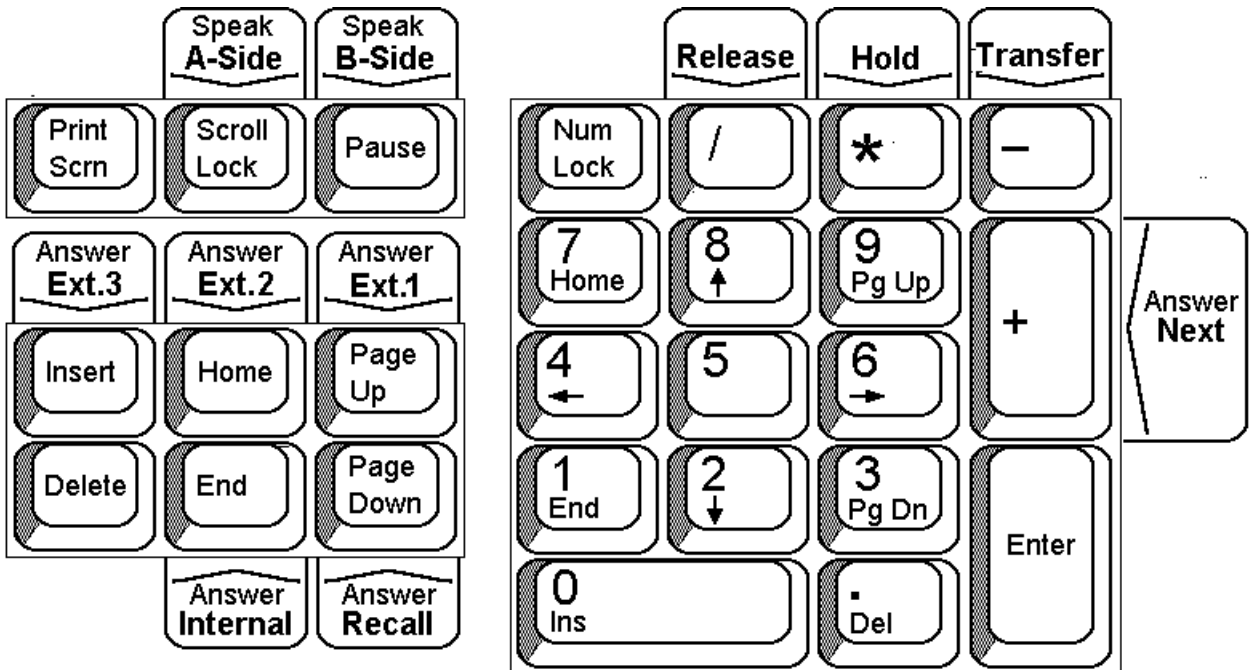


Calls put on hold and left there too long reappear at the console in the **Recall** queue. The time calls stay on hold before recalling is set on the telephone system.

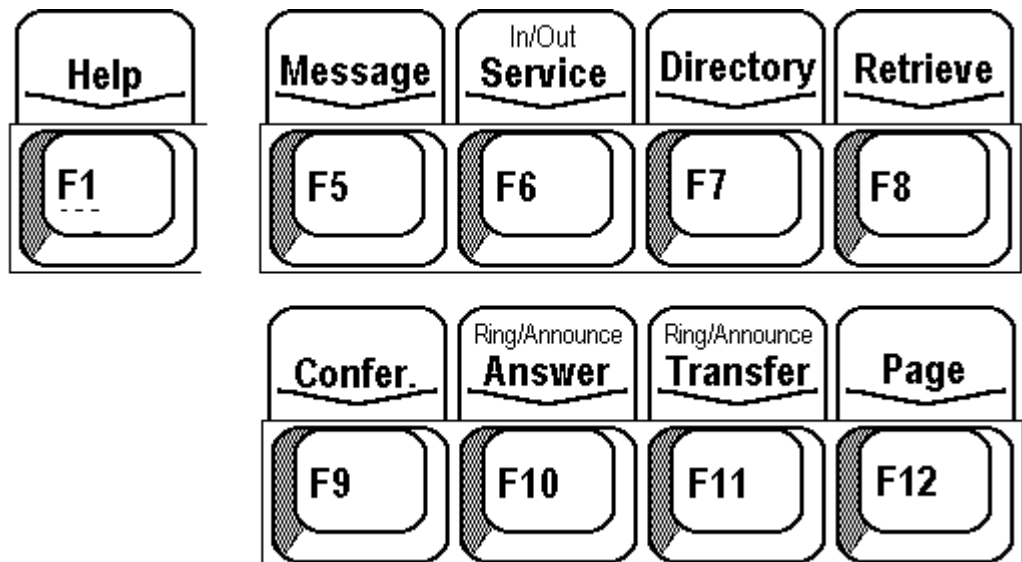
Keyboard Overlays

Selected keys on the PC keyboard match those shown on the console screen. Lucent Technologies provide two keyboard overlays with the console to show these key functions. If you have no console overlays, you should contact your Lucent Technologies supplier.

Numberpad Keys Overlay



Function Keys Overlay



Using the Console

Starting the Console

Properly installed, the console runs directly from switching on the PC power. If this does not happen, do one of the following. While loading the screen displays a startup progress bar.

To start the console with the PC switched off:

1. Switch the console PC and display on.
2. If the power light next to the PC switch does not come on, check the power lead and mains socket.
3. If the power light on the monitor switch does not come on, check the monitor power lead.
4. The PC should automatically start-up Windows and then the Operator's Console.

To start the console from the DOS prompt (C:>):

If the PC is already on, but displaying a DOS prompt (eg. C:>), you must start Windows (which should automatically start the console).

1. Type **win** and press ↵.

To start the console from Windows:

1. Locate the **Operator's Console** group.
2. Click the cursor on the group to display the icons it contains.



3. Double-click on the **Console** icon.



Stopping/Pausing the Console

The console operates in two modes; **In-Service** or **Out-of-Service**.

- **In-Service**: The console displays and can answer calls.
- **Out-of-Service**: The console does not display calls. It can still be used to make calls. The call queue area displays "***Out of Service***".

To go in/out-of-service:

1. Press **Service** to go in or out of service. **Note:** Do not do this while on a call.
-

Exiting the Console Program

Both methods of exiting the console program described below, automatically take the console out-of-service. Before switching the console off, ensure that the telephone system is either in night service or that another extension is available to take the operator's calls.

To close the console:

1. Double-click on the close-symbol at the top-left of the console window or click on **F**ile and then **E**xit Console.



To switch the PC off:

1. Switch the console PC off **only after** having exited the console program.
2. Double-click on the close-symbol at the top-left of the Program Manager window.



3. A dialogue box appears, press ↵.
4. When the DOS prompt appears (ie. C:>), switch the console PC and screen off.

Answering Calls

After answering a call, you can do any of the following actions for the caller.

- **Make an Announced Transfer:** *See page 13.*
 - **Make an Unannounced Transfer:** *See page 12.*
 - **Create a Conference:** *See page 16.*
 - **Hold the Call:** *See page 17.*
 - **Hold and Answer Next:** *See page 17*
-

Answering Internal Calls

Internal calls appear in the queue labeled **Int**. They come from other extensions on the telephone system.

To answer an internal call:

1. Press **Answer Internal**.
 2. The caller details appear in the **A-Side** box. The box highlight is blue, showing that you are now talking to that caller.
-

Answering External Calls

External calls appear in any one of the 3 bottom queues. Which queue depends on which trunk the call arrived.

To answer an external call:

1. To answer the longest waiting call press **Answer Next**.
2. Otherwise press the key that corresponds to the queue the call is in; **Answer Ext.1**, **Answer Ext.2** or **Answer Ext.3**.
3. The caller details appear in the **A-side** box. The box highlight is blue, showing that you are now talking to that caller.

Unannounced Transfers

This is a quick way of handling callers. Use it when the call recipients do not need or want to be warned about the identity of their caller before taking calls.

Making an unannounced transfer puts the caller on hold and rings the transfer number if it is free or sends it a call waiting message if it is busy. If the call rings unanswered or waits at a busy extension for too long, it reappears in the console recall queue. When you answer it, the console displays all the information of the original extension to which you tried to transfer the call.

Making an Unannounced Transfer

1. Dial the number the caller wants.
2. Information about the transfer extension appears in the **B-Side** box. Note that you are still connected to the caller.
 - The box highlight may also show the extension status (unless on another site on the telephone network): *green = free, red = busy, white = unobtainable*
3. If the transfer number is free, press **Transfer** to transfer the caller.
4. If the transfer number is busy and the caller asks for another destination, dial the new transfer number. The **B-Side** box changes to show the status of the new transfer number.
5. If the transfer number is busy and the caller wants to hold, press **Transfer**. The call transfers to the busy number (which receives a *Call Waiting* warning).
6. If the transfer number is busy and the caller will try again later, press **Release** twice to end the call.

Announced Transfers

Use announced transfer when the call recipients want to be warned about the identity of their caller before taking (or rejecting) calls. It allows you to talk to the intended recipient without the caller hearing. If they accept the call, you can press **Transfer** to transfer it.

If the recipient is busy, using a **Ring/Announce Transfer** puts the call on hold. It reappears in the **Ring Ann** queue when the recipient extension becomes free (or it has been on hold for too long).

Making an Announced Transfer:

1. Dial the number the caller wants.
2. Information about the transfer extension appears in the **B-Side** box.
 - The box highlight may also show the extension status (unless on another site on the phone network): *green = free, red = busy, white = unobtainable*.
3. If the transfer number is free, press **Speak B-Side** to announce the call to that extension. The box highlight changes to blue to confirm which side you are connected to. The caller in the A-Side cannot hear you or the extension.
 - Use the **Speak A-Side** and **Speak B-Side** keys to toggle between the two calls.
 - If the call is accepted, press **Transfer** to transfer the caller.
 - If the call is not accepted, press **Release** and **Speak A-Side**. Inform the caller and ask if they want to talk to someone else, leave a message or try again later.
 - Dial the new number or press **Release**.
4. If the transfer number is busy and the caller asks for another destination, dial the new transfer number. The **B-Side** changes to show the information about the new transfer number.
5. If the caller wants to hold, press **Ring/Announce Transfer**. The console holds the caller until the transfer number becomes free. Then the call returns to you in the **Ring Ann** queue (*see page 14*).
6. If the transfer number is busy and the caller will try again later, press **Release** twice to drop the call.

Answering a Recall Queue Call

Calls transferred previously or held at the Operator's Console, reappear in the Recall queue for several reasons. The reason is displayed in the **A-Side** of the call handling window.

- **Ringing Recall:**
Call transferred to a free extension but unanswered.
- **Busy Recall:**
Call transferred to a busy extension to wait, but not answered.
- **Recall From Hold:**
Call left on hold for too long.

For previously transferred calls, the **B-Side** box displays the original transfer number information. How you handle the recalled call depends upon what the caller requires.

- **Unannounced Transfer:** *See page 12.*
 - **Announced Transfer:** *See page 13.*
 - **End Call:** Press **Release** as appropriate.
-

Answering a Ring Announce Recall Call

Calls waiting for an announced transfer to a busy extension, appear in this queue when the extension becomes free or if it stays busy for too long. At this stage you can announce the call.

To answer a ring announce recall:

1. Press **Ring/Announce Answer**. The original call details reappear, showing the caller in the **A-Side** and the transfer number in the **B-Side**. The console automatically dials and rings the transfer number.
2. When answered, announce the caller to the transfer extension, the caller in the **A-Side** cannot hear you or the extension.
3. Use the **A-Side** and **B-Side** keys to toggle between the caller and the transfer extension.
4. If the call is accepted, press the **Transfer** key to transfer the caller.
5. If the call is not accepted, press **Release** while still in the **B-Side**. Inform the caller and ask if they want to talk to someone else or try again later.
6. Dial a new number or press **Release** to end the call.

Adding Call Annotations

If you have Call Annotation selected (*see page 23*), you can type a short annotation (note) into the call box while talking to an external caller. If you transfer the call to a suitable display terminal, the first 16 characters of the annotation appear on the terminal.

The console retains a call's annotation until the caller is released, ie. if a call you transferred returns as a recall, the call information shows your original annotation (unless transferred over a network link). Entering a new annotation overwrites any existing annotation.

To add a call annotation:

1. Simply start typing, a **Call Annotation** box containing the text appears automatically.
 2. To cancel the new annotation, press **Esc**.
 3. To enter the annotation, press **↵**.
-

Making Page Calls

You can page any extension on the system that is free or phones in a group that are free. Anybody near those phones will hear the page. The recipients do not have to answer their phones to hear the page.

To make a page call:

1. Press **Page** key.
 2. Dial the number of the group or extension which you want to page.
 3. Speak and after the page, press **Release**.
-

Retrieving a Transferred Call

After transferring an external call, you can snatch the call back while it is still ringing or waiting at the transfer extension. Retrieve only applies to the last external call you transferred from the console.

To retrieve a transferred call:

1. Press **Retrieve**. If successful, the original call details reappear.

Creating Conference Calls

You can take part in and form conferences. Other parties may ask you to create a conference for them and then exit the conference yourself.

To create a conference call:

1. Make a first call (or answer a call). Tell the party that you are setting up a conference.
 2. To add a party, dial their number and press **Confer**, the console automatically puts the party in the **A-Side** on hold.
 3. If the other party agrees to the conference, press **Confer** again.
 4. If they do not answer, press **Release** to drop the call and return to the **A-Side** party.
 5. Repeat the above steps to add further parties to the conference.
 6. Press **Release** to exit from a conference. This will not affect the other members of the conference.
-

Leaving Call Messages

If the extension called is a DT phone, TT phone, FT-1M or FT-2/3/4 phone, you can leave a message. The system lights that phone's lamp and stores your extension number for a return call.

To leave a call message:

1. Dial the extension number.
2. Press **Message** to end the call and light the phone's message indicator.

Holding and Retrieving Calls

The console allows calls to be held (for later retrieval) in two ways.

- **The Hold Queue**: Controlled by the **Hold** key. This can contain several held calls. At any time it displays the 6 longest held calls, showing each by its line number.
- **Personal Hold Bays**: These are controlled by the **Hold 1**, **Hold 2** and **Hold 3** keys on screen. Each holds just one call but displays the call details including call annotations.

You or any other extension can retrieve calls the console puts on hold by dialling the held call's line number. This allows you to put a caller on hold, and then make a page call for somebody to pickup that line.

To hold a call:

1. While speaking to the caller, press the required hold key.

To retrieve a held call:

1. Press the appropriate hold key to retrieve a call from the Hold Queue or Personal Hold Bays.
2. Alternatively, dial the appropriate line number.

Hold and Answer Next

This option allows you to rapidly answer and hold a series of calls. It puts the current call on hold and answers the longest waiting external call.

To hold & answer next:

1. While speaking to the caller, press **Answer Next**.

Auto-Dial

Using Auto-Dial

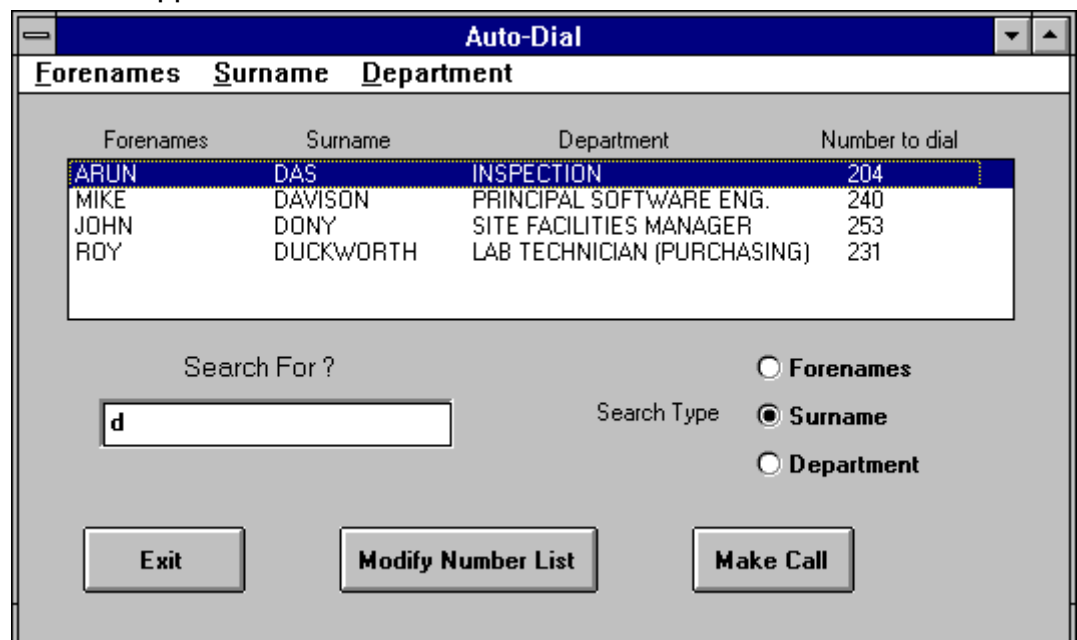
Auto-Dial allows you to quickly search and dial from a database of numbers stored on the console. These numbers can include internal extensions and external numbers. The Auto-Dial database is separate from the telephone system's directory (*see page 20*).

To automatically start Auto-Dial searches:

You can select to have Auto-Dial appear whenever you start typing a name on the keyboard (*see page 23*).

To manually start Auto-Dial:

1. From the console screen, press **Alt+A**. The Auto-Dial window appears.



2. Start typing the name you want. The Auto-Dial windows will show matching surnames.
3. Once inside the Auto-Dial screen:
 - To view matching forenames, press **Alt+F**.
 - To view matching departments, press **Alt+D**.
 - To view matching surnames, press **Alt+S**.
4. Highlight the name required using the up and down arrow cursor keys.
5. Press **↵** to dial the highlighted number. The Auto-Dial windows closes automatically.

To exit the Auto Dial database:

1. Press **Esc** or click on the **Exit** button.

Modifying the Auto-Dial Database

Using the console you can add, delete and update entries in the Auto-Dial database.

To enter the database:

1. Press **Alt+A**.
2. Click the cursor on **Modify Number List**. The **Table 'entries'** window appears, showing the first entry or the currently selected entry in the Auto Dial screen.

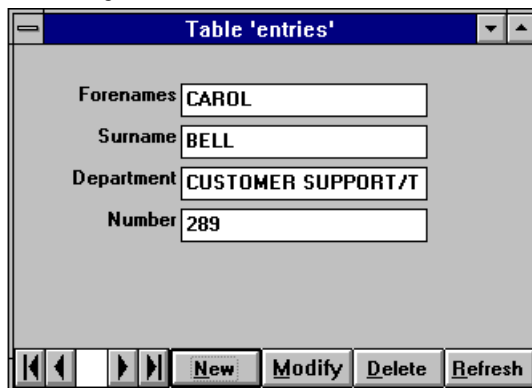



Table 'entries'	
Forenames	CAROL
Surname	BELL
Department	CUSTOMER SUPPORT/T
Number	289


Navigation: First, Previous, Next, Last
 Action: New, Modify, Delete, Refresh

3. Use the  controls to go to the first, previous, next or last entries.


To delete an entry:

1. Display the entry to delete and click on **Delete**.

To add a new entry:

1. Click on **New**.
2. Type the details required, using  to move between entry boxes.
3. When completed, press **Modify**.

To change an entry:

1. Display the entry to change.
2. Make the required changes, using  to move between entry boxes.
3. To undo the changes, press **Refresh**.
4. When completed, press **Modify**.

To exit to the Table 'entries' window:

1. Press **Esc**.

Using the Directory

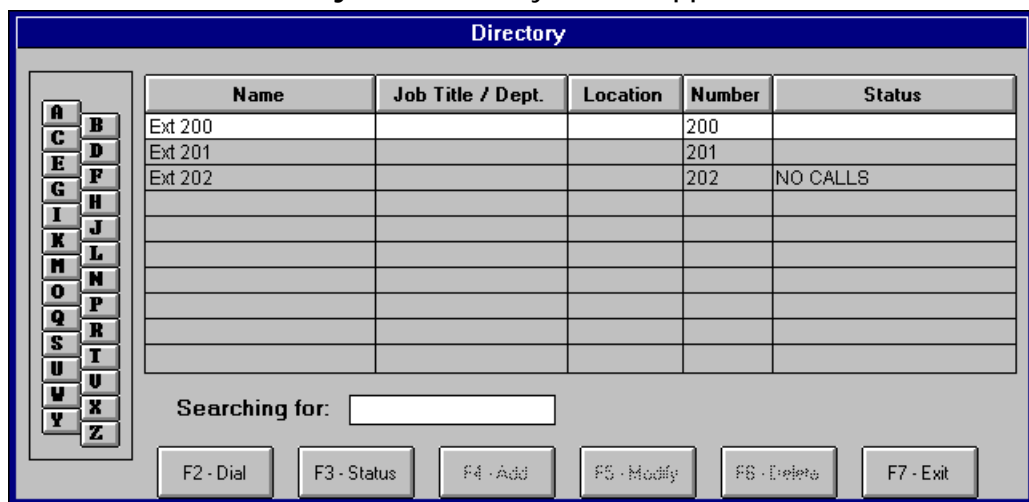
Introduction

The console can display the directory of extension numbers stored on the telephone system. This differs from the Auto-Dial directory which is stored on the console PC.

You can use the system directory to dial numbers. However, its main use is to remotely check and change the status of extensions. For example, to put an extension in group, cancel no calls, alter an extension's divert numbers, etc.

To display the directory:

1. Press **Directory**. The directory screen appears.



2. The directory entries are **Name** and **Number** (the system does not currently use the **Job Title/Dept.** and **Location** entries). The current status of each extension is also shown.

To exit the directory:

1. To exit the directory, press **Directory** again.

Sorting, Searching & Dialling

To display an alphabetic section:

1. Click on the required letter key (these appear at the left-hand edge of the directory listing).



2. The directory displays all entries beginning with that letter.

To display a name or number range:

1. Type the name or number required, the console displays your typing in the **Search** box.

Searching for:

2. Press **↵**.
3. The directory displays the entry/entries that match the text/number typed.

To dial an extension:

1. Use the up and down-arrow cursor keys to move the highlight over the extension required.
2. Press **Dial**.
3. The Directory closes automatically after dialling.

Altering a Terminal's Status

Through the **Directory** window you can display the details and settings of an extension. You can also change the settings if required. Note that the console cannot take ACD turrets in or out of group.

To change an extension's status:

1. Highlight the directory entry required.
2. Press **Status**.
3. The **Modify Terminal Status** box appears. This displays the extension details and the status options with the current settings already selected.
4. Click on the mode required:
 - **In Group:** Available to answer direct and group calls.
 - **Out of Group:** Available to answer direct calls only.
 - **No Calls:** Not available. Note that selecting this option automatically deletes the terminal's Divert All setting.
 - **No Calls Divert:** Not available, divert calls to the Divert All setting.
 - **Diverting Calls:** Divert all calls to the Divert All setting.
 - Note that if you select **No Calls Divert** or **Diverting Calls** and the terminal has no **Divert All** setting, the console requests a **Target?**. Enter the target directory number for diverted calls and press ↵.

5. The **Divert All** number setting can be altered when the status is set to **Diverting Calls** or **No Calls Divert**. (**Divert Busy** and **Divert N/A** cannot be changed).
6. When finished, press **F8** (Using **Esc** to exit does not save any changes).

Console Customisation

Overview

You can customise the console in several ways:

- "Keyboard Auto-Dial or Call Annotation" on page 23.
- "Changing the Date & Time" on page 24.
- "Changing External Queue Labels" on page 25.
- "Changing the Console Ringing" on page 26.
- "Changing the Console Language" on page 27.

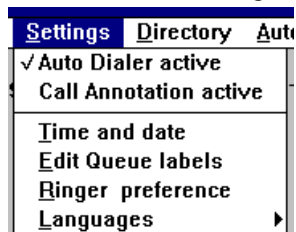
Keyboard Auto-Dial or Call Annotation

While talking to a caller, typing on the keyboard can have one of two effects:

- **Auto-Dial:** Search the Auto-Dial database using on the text that you type (*see page 18*).
- **Call Annotation:** Add the text that you type as a call annotation (*see page 15*).

To select Auto-Dial or Call Annotation:

1. Click on Settings in the console menu-bar.



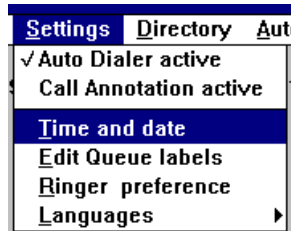
2. The tick mark against **Auto Dialer active** or **Call Annotation active** shows the currently selected mode.
3. Click on the mode required to change the setting.

Changing the Date & Time

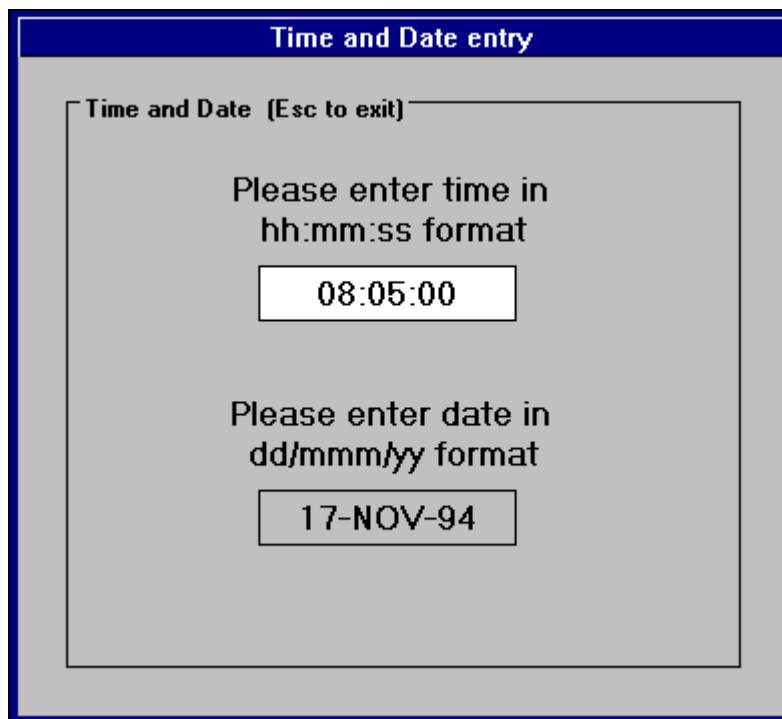
The console displays the date and time as set on the telephone system. Changing the console values also changes the telephone systems settings.

To change the date & time:

1. Click on **Settings** in the console menu-bar.



2. Click on **Time and Date**. This displays the **Time and Date** entry box.



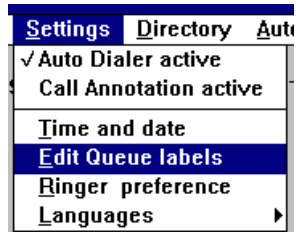
3. Enter the date or time and date required using the formats shown above each box (you cannot change just the time only).
4. Switch between entry boxes by pressing **Tab** or by clicking on the box required.
5. When finished, press **Esc** to exit without saving the changes or press ↵ to save the changes.

Changing External Queue Labels

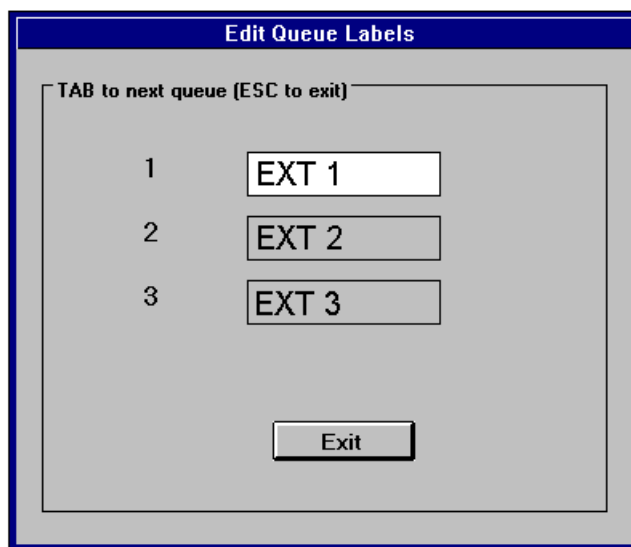
You can give each of the external queues a label (other than their defaults of **Ext.1**, **Ext.2** and **Ext.3**).

To change the external queue labels:

1. Click on **Settings** in the console menu bar.



2. Click on **Edit Queue labels**. This displays the **Edit Queue Labels** box.



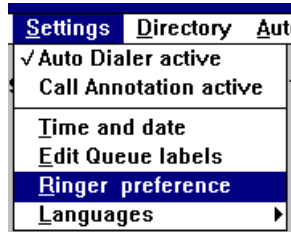
2. Enter the labels required.
3. Switch between entry boxes by pressing the **Tab** key. Note that the console only displays approximately 11 characters.
4. Ensure that you press **Tab** after changing a label.
5. When finished click on **Exit** to exit.

Changing the Console Ringing

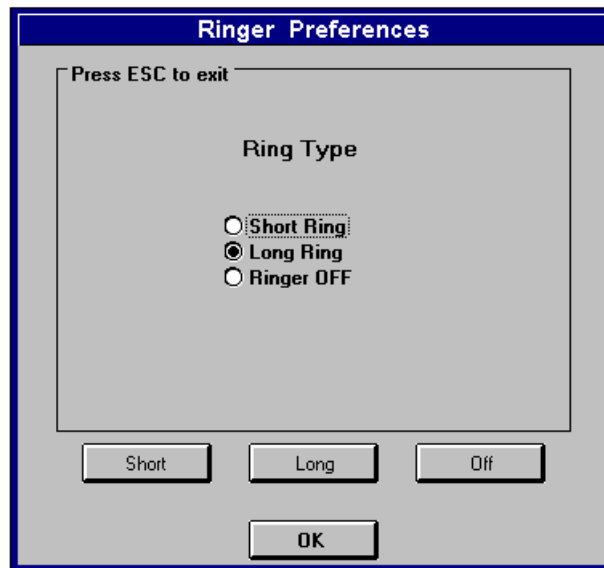
You can change the console ringer (used to indicate new calls).

To change the console ringing:

1. Click on **Settings** in the console menu bar.



2. Click on **Ringer preference**. This displays the Ringer Preferences box.



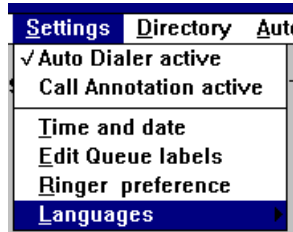
3. Select the type of ringing required.
4. To exit, click on **OK** when finished.

Changing the Console Language

You can switch the console to your preferred language.

To change the console language:

1. Click on **S**ettings in the console menu bar.



2. Select **L**anguages. A menu of the languages available appears.
3. Move the cursor over the language required and when it is highlighted release the mouse button.
 - The **O**ptions choice displays a menu of buttons from which to make the language selection.
4. **Note:** If the console does not have all the phrases it needs in the language you select, it will prompt you to enter the text to use for each missing phrase.

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