



Avaya SoftconsoleTM
Release 1.0
Quick Reference

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Quick Reference

Logging In and Exiting

This booklet contains basic instructions for using the Avaya Softconsole™ Release 1.0 for Avaya call processing systems versions R9 and later. 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 1.0 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. Double-click on the **Softconsole** icon.
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 **OK**.

NOTE:

If you are working in an Internet Protocol (IP) configuration, you must also log into the Avaya call processing system server before you can use Softconsole. See "Log into IP configurations," on the next page.

Identify yourself to Softconsole

If your Softconsole is configured for multiple attendants and 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 **Change Attendant** to display the login dialog box.
2. Enter your login name and password.
3. Press **ENTER**, or click **OK**.

Exit a Softconsole session

 **NOTE:**

If you are working in an IP configuration, follow the procedure in “Log off IP configurations,” on the next page, to end your Softconsole session.

1. Before you choose to exit your Softconsole session, be sure that no calls appear on the console.
2. From the File menu, click **Exit**.

 **NOTE:**

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

Log into IP configurations

If you are working in an IP configuration, you must complete this procedure to log into the call processing system server. After you successfully start the Softconsole application, you see the IP Login window.

1. Start Softconsole according to the procedure in “Start a Softconsole Session,” on the previous page.
2. At the IP Login window, enter the following information in the appropriate boxes:
 - your assigned extension
 - your password

 **NOTE:**

This login information is provided by your call processing system administrator.

3. Do one of the following (optional):
 - If you want the application to save your password for the next time you log into the server, mark the **Remember password for next login session** check box.
 - If you want the application to log into the server automatically the next time you start a Softconsole session, mark the **Automatically login if possible when application restarts** check box.
4. Click **Login**.



NOTE:

Depending on your configuration, an additional dialog box may appear prompting you to verify the connection by making a test call. To verify the connection, click **OK**.

Log off IP configurations

1. Before you choose to exit your Softconsole session, be sure that no calls appear on the console.
2. From the File menu, click **IP Login**.
3. From the IP Login menu, click **Logoff Switch**.



NOTE:

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

Get help

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

Basic Call Handling

Hot Key Summary

“Hot keys” are specific key combinations (for example, ALT-K or CTRL-D) 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
ALT-O	Opens the Action menu
ALT-F	Opens the File menu
ALT-V	Opens the View menu
ALT-A	Opens the Features menu
ALT-D	Opens the Directory menu
ALT-T	Opens the Trunks menu
ALT-H	Opens the Help menu
ALT-I	Displays information (call appearance, second party detail, etc.)
ALT-M	Initiates email to a selected directory entry
ALT-1 through ALT-6	Allows direct keyboard selection of specific call appearances
ALT-S	Shows the line status of a selected directory entry

Answer a call

1. Do one of the following:
 - If the Pickup Indicator border appears on the associated 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** to place the current call on hold. Then, follow steps 1 and 2.

Call an extension

1. Do one of the following:
 - Press **F3 (New)**. Then, use the keyboard to dial the extension number.
 - Press **ALT** and the key (1 to 6) corresponding to an available call appearance. Dial the extension.
 - 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)**. Then, dial the appropriate trunk access code.
 - Press **ALT** and the key (1 to 6) corresponding to an available call appearance. Then, dial 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, dial 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 call processing system):

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 call processing system):

1. Press **F8 (Hold)** to place the current call on hold.
2. Use the up and down arrow keys to select an available call appearance.
3. Dial the extension or 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)**. You can now use the up and down arrow keys to retrieve the next held call.

Release a call

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

Retrieve a held call

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

- If the Pickup Indicator border appears on the associated call appearance, press **F4 (Pickup)**.
- 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.

Make comments about a call

To make temporary notes while active on a call:

1. Click on 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.
 - Press **TAB** to access another call appearance.
 - Click on a feature, trunk, or hundreds group button.
 - Select a new directory.

Conferencing Calls

Set up a conference call

 **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. Dial 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

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

End a conference call

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 **OK**.

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

Select a directory

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.

Access the Directory menu

With the focus on the directory display, press **ALT-D** to access the Directory menu.

Find information in the directory

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



NOTE:

If you want to perform a “typedown” search, you can press any key in the main keyboard area of your computer and pause to initiate the search. To refine the typedown search, continue typing.

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
 - Access the Directory menu by pressing **ALT-D**, and press **A (Add)**.
 - On the Directory toolbar, click **Add**.
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 **OK**.

Change information in the directory

1. Locate the entry you want to edit.
2. Do one of the following:
 - Access the Directory menu by pressing **ALT-D**, and press **E (Edit)**.
 - On the Directory toolbar, click **Edit**.
3. In the Modify Directory Entry dialog box, change the necessary information.
4. To save the changes, press **ENTER** or click **OK**.

Delete an entry from the directory

1. Locate the entry you want to delete.
2. Do one of the following:
 - Access the Directory menu by pressing **ALT-D**, and press **D (Delete)**.
 - On the Directory toolbar, click **Delete**.
3. In the warning dialog box, press **ENTER** or click **Yes** 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:
 - Access the Directory menu by pressing **ALT-D**, and press **S (Show Details)**.
 - On the Directory toolbar, click **Show Details**.

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:
 - Access the Directory menu by pressing **ALT-D**, and press **E (Edit)**.
 - On the Directory toolbar, click **Edit**.
3. In the Modify Directory Entry dialog box, move to the Notes area using the mouse or **TAB** key, or press **ALT-N (Notes)**.
4. Enter the necessary information in the Notes area.
5. Click **OK** 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 one of the alternate number call buttons in the detailed information panel.
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**.
 - Access the Directory menu by pressing **ALT-D**, and press **M (Send e-mail)**.
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 **Send** 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.

