

Switchboard Manual

Voclarion® 2.3



Copyrights

Copyright © November 2014 Voclarion
All rights reserved.

Asterisk® is released as under the GNU General Public License (GPL), and it is available for download free of charge. Asterisk® was created by Mark Spencer of Digium, Inc in 1999.
All trademarks used herein are property of their respective owners.

Information in this document is subject to change without notice and does not represent a commitment on the part of Voclarion. The software described in this document is furnished under a license and/or copyright and may only be used in accordance with the terms of the corresponding license. No part of this manual may be reproduced or transmitted in any form or by any means, electronic or mechanical, including photocopying and recording, for any purpose except for the sole intent to operate the product or without the express written permission of Voclarion.

Disclaimer

Voclarion has prepared this manual for use by Voclarion personnel and clients. The drawings and specifications contained herein are the property of Voclarion or her affiliates and shall be neither reproduced in whole or in part without the prior written approval of Voclarion, nor be implied to grant any license to make, use or sell equipment manufactured in accordance herewith.

Voclarion reserves the right to make changes in specifications and other information contained in this document without prior notice, and the reader should in all cases consult Voclarion to determine whether any such changes have been made.

The terms and conditions governing the sale of Voclarion hardware products and the licensing of Voclarion software consist solely of those set forth in the written contracts between Voclarion and its customers. No representation or other affirmation of fact contained in this document including but not limited to statements regarding capacity, response time performance, suitability for use, or performance of products described herein shall be deemed to be a warranty by Voclarion for any purpose, or give rise to any liability of Voclarion whatsoever.

In no event shall Voclarion be liable for any incidental, indirect, special or consequential damages whatsoever (including but not limited to lost profits) arising out of or related to this document, or the information contained in it, even if Voclarion has been advised, knew, or should have known of the possibility of such damages.

Images are used for illustrative purposes only, actual products and/or packaging may differ.

Publication Date and Software Version

Published on 6. November 2014. Based on Voclarion® 2.3 (revision 31588). Manuals are updated continually. For the latest version check the Download Center on the Voclarion® PBX Manager on a regular basis. For information about manual orders and manual invoices please contact LuLu support.

Errata

We make every effort to ensure that there are no errors in the text or in the code of this book. However, no one is perfect, and mistakes do occur. If you find an error like a spelling mistake or a faulty piece of code, we would be very grateful for your feedback. By sending errata you may save another reader hours of frustration and at the same time you are helping us.

Open Source

The source code for the GPL'd parts of the Voclarion® software is available on request for a nominal fee. Please contact us for more information.

Contact Information

Voclarion 6515 Shiloh Road, Alpharetta, GA
www.voclarion.com, sales@voclarion.com
phone: +1 770 752 2929 / fax: +1 770 888 5375

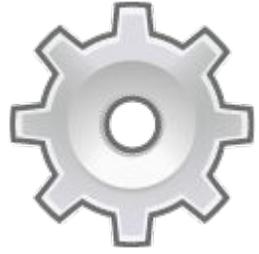
Authors

Ron Arts, Jeroen Beelen

Table of Contents

Chapter 1. Introduction.....	7
1.1. How To Read This Manual.....	8
Topics of this manual.....	8
Other manuals.....	8
1.2. What is Voclarion®?.....	10
Asterisk.....	10
Voclarion.....	10
1.3. What's New In This Release?.....	12
Added Parking lot support.....	12
Agent queue screen.....	12
Conference boxes.....	12
Font size.....	12
Improvements and fixes.....	12
1.4. Conventions.....	13
Conventions.....	13
User Input.....	13
Mouse.....	13
Keyboard.....	14
Special signs.....	14
Time and dates.....	14
Caller ID.....	14
Caller Name.....	16
Wildcards.....	16
References.....	18
Referring to the PBX Manager.....	18
Notes.....	18
Bibliography.....	18
Illustrations.....	19
Chapter 2. Voclarion® Switchboard.....	21
2.1. Introduction.....	22
2.2. Installation.....	23
Requirements.....	23
Software Installation.....	23
First Time Setup.....	24
Interface and default behavior.....	29
2.3. Setting Up the Application.....	32
Tabs.....	32
Information Windows.....	32

Docking a window to a tab.....	33
Context menu.....	34
Information windows overview.....	34
Information Window: Employee List.....	34
Information Window: Queue List.....	39
Information Window: Queue.....	39
Information Window: Agent queue.....	41
Information Window: Conference list.....	42
Information Window: Conference.....	42
Information Window: Parking lot list.....	43
Information Window: Parking lot.....	43
Information Window: Trunk List.....	43
Information Window: Trunk.....	44
The BLF Panel.....	45
Information Window: Analog Clock.....	48
2.4. Everyday Use of the Voclarion® Switchboard.....	49
Dial a Phone Number.....	49
Transfer a call.....	49
Call Forwarding settings.....	50
Queues.....	52
Outlook Exchange Agenda.....	52
Setup.....	52
Access the Calendar.....	54
Operator Panel.....	54
Noticing an Incoming Call.....	56
Answering a Call.....	57
Ending a Call.....	57
Parking a Call.....	57
Retrieve a parked call.....	57
Transferring a Call.....	58
Phone book.....	59
Transferring a call, using the Phone Book.....	60
2.5. Other features.....	62
Dial a phone number from the Clipboard.....	62
2.6. Closing the Voclarion® Switchboard.....	63



Chapter 1. Introduction

This manual is designed to help you to install and operate the Voclarion® Switchboard.

1.1. How To Read This Manual

This manual guides you – the system administrator - through the process of installing the Voclarion® Switchboard. You will find that there is often more than one way to reach a certain goal. Multiple methods have been described only in cases where each clearly offers different advantages under different circumstances.

If you are using the Switchboard for the very first time, it is highly recommended you read the manual start to finish. If you are a more experienced user, you probably will use this manual only for reference. At the start of the manual you'll find a table of contents and at the end of the manual you'll find an easy to use index to help you find what you are looking for.

1.1.1. Topics of this manual

Following this introduction, you will find a chapter about how to install the Switchboard software. Read it very carefully and make sure you install it according to these instructions. Furthermore we describe all function of the Switchboard.

This manual is based on Voclarion® Switchboard version 2.3.31588. You can check your current version number in the About windows of the software.

1.1.2. Other manuals

Voclarion has a wide variety of (phone) manuals available. Go to the Download Center to download manuals.

1.2. What is Voclarion®?

The Voclarion® you are about to use is a so called Private Branch eXchange (PBX), an advanced telephone exchange that serves a particular business or office. PBXs are also referred to as PABX (Private Automatic Branch eXchange) or EPABX (Electronic Private Automatic Branch eXchange). In this manual we prefer to use the term PBX.

PBXs make connections among the internal telephones of a private organization — usually a business — and also connect them to the public switched telephone network (PSTN) via trunk lines like analogue lines and ISDN, or to the Internet using a protocol like SIP. Because they incorporate telephones, fax machines and other hardware and software applications, the general term "extension" is used to refer to any point on the branch.

PBXs are differentiated from "key systems" in that users of key systems manually select their own outgoing lines, while PBXs select the outgoing line automatically. This is called least cost routing.

1.2.1. Asterisk

Voclarion® is based on Asterisk™¹, the world's leading open source telephony engine and tool kit. Offering flexibility unheard of in the world of proprietary communications, Asterisk empowers developers and integrators to create advanced communication solutions.



1.2.2. Voclarion

Voclarion is specialized in open source projects, especially Asterisk. However we really think Asterisk is great software, it is missing (in our point of view) some important business features. So, we created a telephony system named Voclarion®, based on Asterisk and we added a lot of new features. Nowadays we add new improvements almost weekly, most of the time based on user suggestions, making Voclarion® one of the most advanced systems available!

Some great Voclarion® Features:

¹ More about Asterisk at <http://www.asterisk.org>

What is Voclarion®?

- ✓ Graphical role based user interface
- ✓ Out-of-the-box provision system
- ✓ Very advanced and flexible call distribution system
- ✓ Real time reports
- ✓ Desktop call software
- ✓ 24/7 support

1.3. What's New In This Release?

The development team added a lot of new features and improvements to the Voclarion® Switchboard.

1.3.1. Added Parking lot support

Parking lot is used for advanced call parking in Voclarion® 2.2.

1.3.2. Agent queue screen

The new agent queue screen shows information about agents. Colors show the agent's current status.

1.3.3. Conference boxes

Switchboard now supports Voclarion® conference boxes.

1.3.4. Font size

The font size can now be changed.

1.3.5. Improvements and fixes

We made several small improvements and fixes.

1.4. Conventions

1.4.1. Conventions

Conventions that are used in this document are listed below.

Icon	Description
	Info, hint or or example. It contains information you can use to your advantage.
	This is a note with additional information.
	This is a caution sign. Read this very carefully.
	This is a warning sign. Read this very carefully.

Table 1: Icons used in this document

1.4.2. User Input

1.4.2.1. Mouse

Mouse actions assume a right-handed mouse configuration. The terms “click” and “double-click” refer to using the left mouse button. The term “right-click” refers to using the right mouse button. The term “middle-click” refers to using the middle mouse button, pressing down on the scroll wheel, or pressing both the left and right buttons simultaneously, based on the design of your mouse.

1.4.2.2. Keyboard

Keyboard shortcut combinations will be displayed as follows: **Ctrl-N**. Where the conventions for “Control”, “Shift,” and “Alternate” keys will be Ctrl, Shift and Alt, respectively. The first key is to be held down while pressing the second key.

1.4.2.3. Special signs

Text between braces “<>” has to be replaced with actual information. For example, if you see <Your IP Address> you have to replace this by your IP address, like 192.168.1.100.

1.4.2.4. Time and dates

When we refer to a time or duration we use the following notation to specify the time format:

- y: year(s)
- m: month(s)
- d: day(s)
- h: hour(s)
- m: minute(s)
- s: second(s)

The number of characters indicates the number of digits, so *m:ss* indicates a time notation like 0:43 or 0:04.

1.4.2.5. Caller ID

The Caller ID (or more properly calling number identification) is a telephone service, available on POTS lines, that transmits a caller's number to the called party's telephone equipment during the ringing signal. Where available, the Caller ID can also provide a name associated with it (Caller Name). The information available to the called party may be made visible on a telephone's display or on a separate attached device.

Conventions



A Caller ID consist of a number of digits without any other characters. The format of a Caller ID is determined by your provider and can differ. It's very important to use the correct format, otherwise the Caller ID will not or incorrect be send with your calls and SIP registration and trunk forwarding will fail. Contact your provider for more information. You can use trunks to reformat Caller ID's.

Caller ID priority

On different places within the Voclarion® GUI you can set a Caller ID. You can add a Caller ID to a company, but also to a user. When a user makes a phone call, which Caller ID will be sent with the call?

This is a case of priorities. Each Caller ID has its own priority. The trunk Caller ID has the highest priority, the company Caller ID the lowest. To determine which Caller ID must be sent, the system uses the first Caller ID it finds (top to bottom).

1. Trunk: Caller ID
 2. Extension: Caller ID
 3. User: Caller ID
 4. Department: Caller ID
 5. Company: Caller ID
- If you don't want the callee to see your phone number when making a phone call, enter a "0" for *one of the Caller IDs*. The Caller ID is now hidden, according to RFCi-3325.
 - Leave the field blank to not change the Caller ID.

Take a look at the following examples:

Examples

Trunk Caller ID	<i>none</i>
Extension Caller ID	0201234510
User Caller ID	0201234599
Department Caller ID	0201234510
Company Caller ID	0201234500
<i>Outgoing Caller ID</i>	<i>0201234510</i>

Trunk Caller ID	<i>none</i>
Extension Caller ID	0201234510
User Caller ID	0201234599
Department Caller ID	<i>0</i>
Company Caller ID	0201234500
<i>Outgoing Caller ID</i>	<i>no Caller ID</i>

Trunk Caller ID	<i>none</i>
Extension Caller ID	<i>none</i>
User Caller ID	<i>none</i>
Department Caller ID	0201234510
Company Caller ID	0201234500
<i>Outgoing Caller ID</i>	<i>0201234510</i>

1.4.2.6. Caller Name

A Caller Name is a name which is send with the outgoing call, like a Caller ID. The Caller Name is not supported by all telecom providers. The Caller name priority behaves in the same way as the Caller ID (see chapter 1.4.2.5).

1.4.2.7. Wildcards

Wildcards are used to select a group of items. For example 1234X selects all 5 digit numbers starting with 1234. If needed more wildcards can be used within one number. The manual indicates on which information wildcards can be used. The following wildcards are available:

Conventions

- . (dot) selects one or more digits
- [xyz] selects one of the digits x,y,z.
- X selects one digit 0-9
- N selects one digit 2-9
- Z selects one digit 1-9

Priority of wildcard numbers (first is the most important):

1. Numbers without wildcards
2. Numbers with the least wildcards
3. Other numbers

Example Wildcards on Inbound Numbers

A company has phone numbers in the range 2125554500
– 2125554599.

- Number 2125554500 has to connect to an IVR menu (extension 100).
- Numbers 2125554501 – 2125554509 have to connect to the Sales queue (extension 200).
- All other numbers have to connect to the operator (extension 400).

Configuration of Inbound Numbers:

Inbound number	1 st extension
2125554500	100
212555450Z	200
21255545XX	400

1.4.3. References

1.4.3.1. Referring to the PBX Manager

This manual refers to the PBX Manager on many locations. The PBX Manager is the graphical user interface of your phone system.

The next frame shows how we refer to a specific page within the PBX Manager. The “>” indicates a mouse click to a next page. An italic word indicates you have to replace this with the option you would like to see, for example: “*user*” means you have to select the user you would like to see.

In this example there are two different ways to go to a “Locations”-settings:

Web interface menu	Company > Locations > <i>Location</i> Quick Setup > Locations > <i>Location</i>
---------------------------	--

- I. Login to the PBX Manager, choose COMPANY from the menu, choose LOCATIONS from the sub menu and select the location you would like to see.
- II. Login to the PBX Manager, choose QUICK SETUP from the menu, choose LOCATIONS from the sub menu and select the location you would like to see.

1.4.3.2. Notes

On some occasions we use numbered footnotes (¹) to clarify the text. Notes are in depth additions to the main text and can in most cases be ignored without further consequences. Footnotes refer to a text on the bottom of the same page.

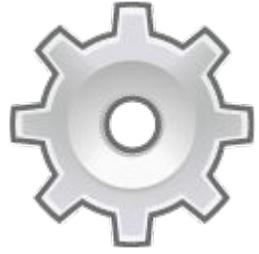
1.4.3.3. Bibliography

The main text contains references to the bibliography at the end of the manual. All references are numbered and placed between braces, like [1]. You may lookup these sources for more information about the given subject.

Conventions

1.4.3.4. Illustrations

On some places we refer to illustrations. All illustrations are numbered and we will refer to it with “see Illustration 4”. Sometimes you'll see something like “see Illustration 5/3”. The second number (3) refers to a number within the image.



Chapter 2. Voclarion® Switchboard

2.1. Introduction

As from Voclarion® 1.6 we added client software called the Voclarion® Switchboard. This software can be used as an operator panel and is designed to manage large amounts of phone calls and can be used on a Windows or Ubuntu PC and a phone with a headset. The whole application can be controlled from the keyboard, so you don't have to use the phone anymore.

The Voclarion® Switchboard application can be downloaded from the Voclarion® PBX Manager.

With the Switchboard software you can:

- Process large quantities of phone calls using your PC keyboard
- See presence information of colleagues
- See information about current calls
- See live queue information
- Transfer calls using drag and drop
- and more.

Although the software is designed for operators, it can be used by anybody who has a Voclarion® account. After login the Voclarion® Switchboard will adjust to the permissions assigned to you in the Voclarion® PBX Manager.

2.2. Installation

2.2.1. Requirements

The Voclarion® Switchboard is designed for use with different kind of phones. To fully benefit from all functions the Switchboard has to offer, we strongly suggest using a phone with hands free or intercom support and a headset connected. You can now use all features without having to touch your phone. Make sure the phone is correct configured.

- Working phone with hands free and headset support
- Connected headset
- Access to the Voclarion® interface to create queues as described on page 25.

2.2.2. Software Installation

The Voclarion® Switchboard is available for different operating systems like Linux, Microsoft Windows Vista/7 and Apple OS X² and runs on any computer with at least 30 MB of free memory and about 25 MB free disk space. Make sure the application has access to port 5655 (default setting) to connect to the Voclarion® PBX.

In this manual we will discuss the installation and use of the Voclarion® Switchboard application (build 31588 and higher³) based on the Microsoft Windows 7 operating system. The installation and use on other systems is similar.

1. Download the latest version of the Voclarion® Switchboard software from the Download Center and save the file on an easy to find location, for example your desktop. After a successful installation you can delete this file.

2 Some versions may not be available yet and will become available later from the Download Center..

3 Current build version can be found within the Switchboard, menu [HELP > ABOUT](#). Check the Download Center for the latest software.

2. Start the setup wizard by double clicking on the downloaded file. The installation wizard will now start. Read every screen careful. In most cases you can choose NEXT to proceed to the next step.
3. At the end of the wizard, you can choose to start the application automatically. You can also start the application from the Start menu at any time⁴. By default the application is also started when Windows starts.

2.2.3. First Time Setup

If you start the Voclarion® Switchboard for the first time, the Preference window will automatically appear asking for some required information. You can change the

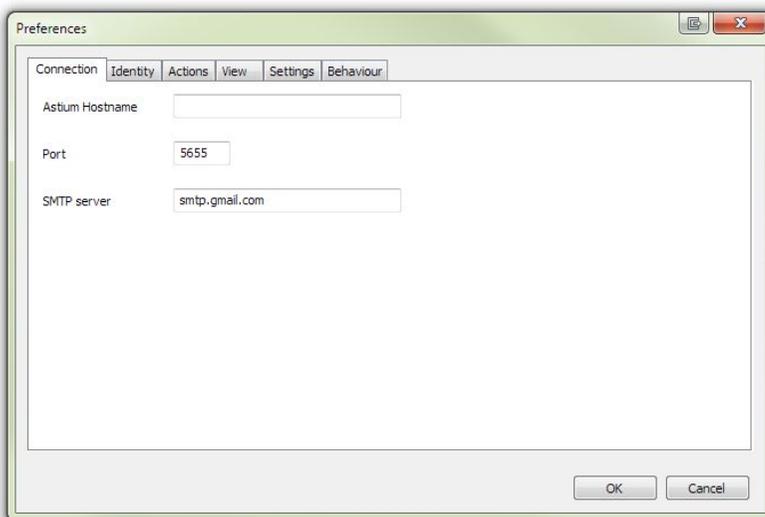


Illustration 1: Switchboard preferences

settings at any time from the menu FILE > PREFERENCES (CTRL-P). It is recommended to exit and restart the application after you made changes to the settings. Note that the settings are saved only if you exit the program correctly by pressing CTRL-Q or by choosing FILE > QUIT.

⁴ In Windows a short cut will be placed in the Start Up folder from the Start menu. The Switchboard application will now start automatically when Windows starts. If you don't want the application to start automatically, you can delete the short cut from the Start Menu.

Installation

The tabbed7 window (illustrations 1 and 2) contains the following fields:

Field	Description
Tab Connection	
<u>VOCLARION® HOSTNAME:</u>	The hostname or IP address.
<u>PORT:</u>	Connection port, the default port is 5655. It is recommended not to change this. This port is used to connect to the Voclarion®.
<u>SMTP SERVER:</u>	The SMTP server's hostname or IP address. Required to send e-mail messages.
Tab Identity	
<u>AGENT USERNAME:</u>	The user name used to login to the Voclarion® PBX Manager.
<u>AGENT PASSWORD:</u>	The password used to login to the Voclarion® PBX Manager.
<u>COMPANY SHORTNAME:</u>	The exact <i>short name</i> of your company, as supplied to the PBX Manager. Only use lowercase characters.
<u>RECEPTION QUEUE</u>	This is the queue for all incoming calls. It is configured in the Voclarion®'s dial plan and can be used by more than one Switchboard agent.

Required Voclarion® queue settings:

- Add agents (operators) to this queue
- CALLER ALLOWED TO BE IN EMPTY QUEUE: "No"

FieldPARKING QUEUE:**Description**

This is the queue for the operator to park calls temporarily. It is configured in the Voclarion®'s dial plan.

Required Voclarion® queue settings:

- Each operator needs its own parking queue. It cannot be shared with other operators.
- Do NOT assign any agents (operators) to this queue.
- CALLER ALLOWED TO BE IN EMPTY QUEUE: "Yes"

HOLD QUEUE:

The queue used for a caller, while the operator is switching between two parties.

Required Voclarion® queue settings:

- Do NOT assign any agents to this queue
- CALLER ALLOWED TO BE IN EMPTY QUEUE: "Yes"

BUSY WAIT QUEUE:

This queue is used for blind transferrers which cannot be transferred yet because the person is busy. In the meantime the call is placed in this Busy Wait Queue. When the person becomes available, the call will be connected to the person automatically.

Required Voclarion® queue settings:

- Do NOT assign any agents to this queue
- CALLER ALLOWED TO BE IN EMPTY QUEUE: "Yes"

See the queue settings from the Voclarion® PBX Manager for more information.

Tab actionsON INCOMING CALLS:START:

The path and application/script which is started when you receive an incoming call (optional).⁵

Installation

Field

ON ACCEPTING A CALL:

START:

CALENDAR URL:

Description

The path and application/script which is started when you accept an incoming call (optional)⁵.

URL of your Outlook Exchange Calendar, see chapter 2.4.1. The URL looks like
`https://mail.domain.com/owa/EMAIL/?cmd=contents&module=calendar&view=weekly` The Switchboard will replace EMAIL with the email address of the selected user.

Tab View

NAME FORMAT:

Select the way person names are shown. Select one of the given options.

DEPARTMENT FORMAT:

Select the way the department names are shown. Select one of the given options.

LANGUAGE:

The interface language. Select one of the given languages.

Tab Settings

ENABLE DRAG/DROP

Enable / disable connecting calls by drag & drop.

CONFIRMATION DRAG/DROP

Confirm all drag & drop actions.

FONT SIZE

Size of the font.

LOG OUT WHEN

When the screen saver starts, logout the phone. When the screen saver ends, login again. It takes a few seconds to login and logout.

SCREENSAVER STARTS

LOCK DESIGN

If lock design is *disabled*, the Switchboard saves current settings of tabs and windows every time the program is closed. To prevent (accidentally) changes to the layout enable this setting. Close/resize buttons are disabled. Also new tabs and windows cannot be created. Other changes will not be saved when closing the Switchboard.

NOTIFICATIONS

Show notifications of incoming calls and other events from the system tray. Mac OS X⁶ and Windows⁷ users need to install the notification tool Growl first.

⁵ See the Programmer's Guide for the parameters you can parse.

⁶ <http://growl.info/>

FieldDIAL HOT KEY**Description**

Press the selected function key to dial the phone number stored on the clipboard from any application (see chapter 2.5.1). After changing this setting, the Switchboard needs to be restarted. Options:

- None (disable)
- CTRL-D
- ALT-D

Tab BehaviorCONNECT A CALL ON HOLD

Mark the setting to activate it.

BY CLICKING THE LINE KEY.PRESSING SPACE PARKS THE

Mark the setting to activate it.

CURRENT CALL, IN STEAD OFPUTTING THE CALL ON HOLD.

Installation



Illustration 2: Switchboard preferences

Click OK after you finished making changes to the settings. The main window appears (illustration 3). The application is set up correctly when the action bar (illustration 3/1) states “Idle”⁸ and the status bar (illustration 3/5) shows no messages. Otherwise an error has occurred. Go to the menu [ACTIONS > CONFIGURATION CHECK](#) to check the settings.

2.2.4. Interface and default behavior

The interface (illustration 3) contains the following items:

1. *Action bar*. Shows information about the current action. You are logged in correct if it states “Idle”.

⁸ Your phone is ready to accept phone calls.

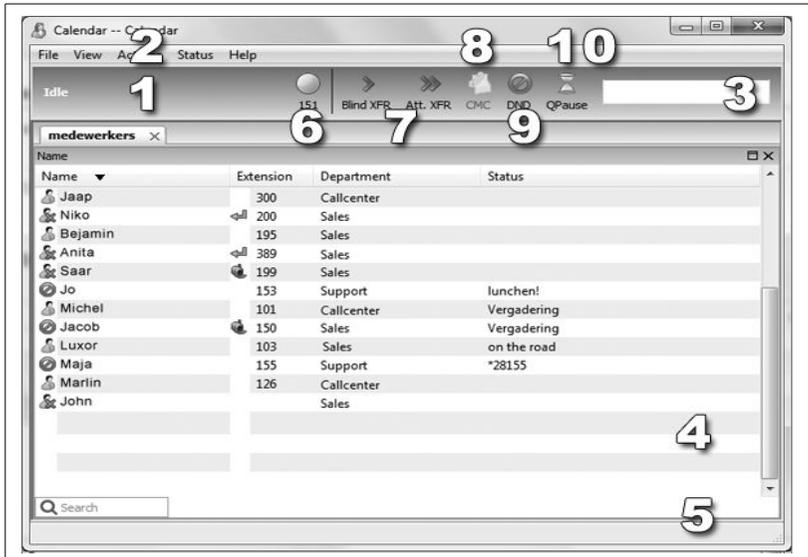


Illustration 3: Switchboard main window

2. *Menu.* The main menu, may change according to the selected Information Windows (see also page 32).
3. *Dial field.* Used to dial a phone number. Type a phone number and press ENTER to call it. By default your phone will switch to hands free or headset, the number will be dialed and you will be connected to this phone number.
4. *Main workspace.* Here you can add tabs and windows as explained later on.
5. *Status bar.* Shows status information.
6. *Line indicator.*
 - A gray icon indicates no current calls.
 - Click on the icon to log off.
 - A fast blinking icon indicates an incoming call.
 - Click on the icon to answer the call.
 - A red icon indicates a call in progress.
 - Click on the red the icon to disconnect the call.
 - A slow blinking icon indicates a call on hold.
 - Click on the slow blinking icon to take back the call on hold.
7. *Transfer (>>) and Blind transfer (>>)*

Installation

- Use these keys while on a conversation to transfer the call with consultation (>>) or without consultation (>).
 - A window pops up to select a colleague, a queue or a phone book entry.
- 8. *Client matter Code (CMC)*
 - During a call you can enter a CMC and a Company ID for the current call. The information is sent to your CRM software.
- 9. *Do Not Disturb (DND)*
 - Pressing this button enables/disables Do Not Disturb (DND). When DND is activated, Queue Pause will be activated too. When DND is active, the top colors red.
- 10. *Qpause.*
 - Pressing this button enables/disables the Queue Pause. When Queue Pause is active, the button changes color and the status bar (illustration 3/5) states “pause”.

2.3. Setting Up the Application

When you start the application for the first time, your workspace is empty like illustration 4. Now you have to add tabs and information windows to display the information you wish to see. Once set, the application will remember the setting for next time use.

2.3.1. Tabs

First you have to add one or more tabs. Think of a tab as a workspace. On a tab you can place one or more so called Information Windows. For example, you can create a tab called “Employees” and place on it all windows corresponding to employees. Next, you create a tab “Queues” with information about queues. Now you have your information nicely ordered and you can easily switch between screens.

To create a new tab go to the menu and click VIEW > NEW TAB (CTRL-T). A window appears asking for a name for this tab. Choose a name and press OK to continue. A new tab will be created and is placed below the Action bar.

To close a tab, press X (cross) on the right of the tab name. The tab and all its content will now be closed and deleted.

2.3.2. Information Windows

Once created, you can add Information Windows to a tab. Information Windows contain information about your phone system, for example live queue information or an employee list. You can add as many windows as you like. In the following paragraphs we discuss all Information Windows.

The Operator Panel is a special window designed for telephone operators which handle a very large volume of calls. We discuss the Operator Panel in chapter 2.4.2.

Setting Up the Application



Illustration 4: Moving a window to the left to dock

2.3.2.1. Docking a window to a tab

To open a new Information Window, go to the View menu and choose one (more info from page 34). A new window is created. The new window floats by default and is not docked to the tab. Floating windows will always be on top and remain visible when changing tabs. To dock a window on a tab, left-click the title bar of the window and drag the window to the top, bottom, left or right of the tab. The background changes color to show where the window will be docked (see illustration 4). You can dock multiple windows on one tab.

Release the left mouse button to dock the window on the selected location. To undock, left-click on the window title bar and drag the window. The window will now float again.

All information is displayed in columns:

- ✓ Click on the header to sort columns.
- ✓ Adjust the column width by clicking between two columns. Drag the mouse to the desired width.
- ✓ Click on the border of a window and drag to change the size of a window.

- ✓ Press **X** to close and remove a window.

2.3.2.2. Context menu

Right-click on an item within an Information Window a person to see the context menu. The menu contains options related to the selected item. The default options are listed below.

- Access to the Outlook calendar
- number of voicemails
- send an email
- call this person
- call mobile phone
- do not disturb
- status
- call forwarding settings
- queues

A operator can change a colleague's call forward settings.

2.3.3. Information windows overview

This chapter contains an overview of all Information Windows you can add to the Switchboard. By selecting a number of windows you control the information you which to see. The windows can be grouped on a tab as described on chapter 2.3.1.

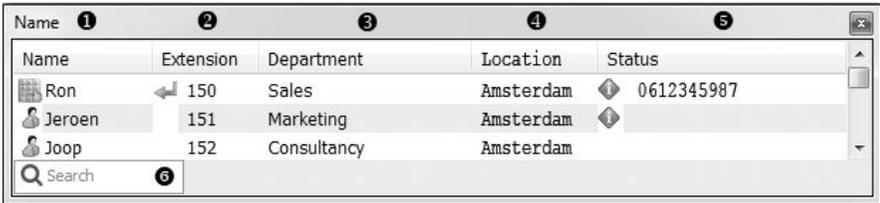
2.3.3.1. Information Window: Employee List

This is a list of employees from the selected companies. To add the list, go to the menu VIEW and select "Employee List". You have to supply a name for the new window and you have to select one or more companies from which you want to see

Setting Up the Application

the employees. A new Information Window will open. If you would like to dock this window, follow the instructions from chapter 2.3.2.1. The overview contains:

- The employee's availability (see table 2) and name (illustration 5/1).
- The employee's call forwarding setting (table 3) and extension (illustration 5/2)
- Department (illustration 5/3).
- (up to 5) Additional user fields as configured on the Voclarion® (illustration 5/4).
- The status field indicates the presence status. It helps you to decide how to contact a colleague. For example: "Away: will be back at 3pm". By right-clicking on the field, you can change your own status⁹. A switchboard operator can change the status of other employees. The  icon indicates there is additional information available. This is the information as supplied in the notes field on the PBX Manager.
The status field can also contain information about a call, for example the person this employee is on the phone with (illustration 5/5).



Name	Extension	Department	Location	Status
Ron	150	Sales	Amsterdam	0612345987
Jeroen	151	Marketing	Amsterdam	
Joop	152	Consultancy	Amsterdam	

Illustration 5: Employee List

Icon	Availability
	Person available

⁹ You can define a new status within the PBX Manager, see the Operator Manual for more details. You can also change the status from the top menu [STATUS](#).

Icon	Availability
	Person logged out
	Person is dialing
	Person's phone is ringing
	Person is on the phone
	Person is put on hold

Table 2: User availability icons

Icon	Call Forwarding
	Bounce all calls back to the PBX.
	Calls are forwarded to manually set phone number.
	Calls are forwarded to employee's voice mail.
	Calls are forwarded to employee's mobile phone.

Setting Up the Application

Icon	Call Forwarding
	Calls are forwarded to the operator.
	Caller has set call forwarding options. Calls are forwarded based on these settings. Forwarding depends on status and caller.
	Calls are forwarded to another number by using the Voclarion® search colleague setting.
	Current call is being recorded.

Table 3: Call Forwarding settings

Additional settings and actions

Right-click on an employee's name to set additional settings or perform actions. Availability of settings depends on the available employee settings, current status and switchboard user's permissions.

- To narrow down the list to employees engaged in a call, right-click and select ACTIVE CALLS ONLY.
- To narrow down the list to employees that are currently logged in, select LOGGED IN ONLY.
- To narrow down the list to employees of a certain department, select SELECT DEPARTMENTS...
- To access an employee's calendar, select CALENDAR. For more information see chapter 2.4.1.
- VOICEMAIL. Shows the number of voice mails for this employee.
- Select E-MAIL to send an email to the employee.

- To call an employee's mobile phone select CALL ON MOBILE
- Select BLIND TRANSFER TO to transfer the current call to this employee.
- CONNECT TO transfers the employee to the given number. When the employee answers the phone, he will be connected to the given number.
- Set the employee to Do NOT DISTURB.
- Set the STATUS OPTIONS of the employee.
- UNCONDITIONAL CALL FORWARD. Transfer all calls¹⁰ to the given option.
- CALL FORWARDING WHEN BUSY. Transfer calls to the given option this person is on the phone.
- CALL FORWARDING WHEN NO ANSWER. Transfer calls to the given option when this phone is not answered.
- CALL FORWARDING WHEN LOGGED OFF. Transfer all calls to the given option when the employee is not logged in.
- QUEUES shows the queues this person is agent for.

Other actions

Other actions which can be preformed from this window.

- To search for a colleague, start typing in the search field on the bottom left of the window (illustration 5/6). Or press F5¹¹ to go to the Search Field. The list will narrow down to the names containing the given characters.
- Double-click on a person's name to set up a call.
- To answer a colleague's ringing phone, double-click on the colleague's name. The call will now be redirected to your phone.

¹⁰ If not set to "ring phone" it will forward all calls and other call forwarding options like 'when logged off' are ignored.

¹¹ Window has to be docked.

Setting Up the Application

- To make employee1 call employee2, drag employee1 and drop it on employee2.

2.3.3.2. Information Window: Queue List

This is a list of queues from the selected companies. To add the list, go to the menu VIEW and select “Queue List”. You have to supply a name for the new window and you have to select one or more companies from which you want to see the queues. A new Information Window will open. If you would like to dock this window, follow the instructions from chapter 2.3.2.1. The overview contains:

- The queue name.
- The queue extension.
- The number of agents assigned to this queue (logged in/total).
- The number of completed calls.
- The number of abandoned calls.
- The number of callers currently waiting.
- The waiting time of the person waiting the longest time.

Actions

- Double click on a queue name to open a new window for this queue (see chapter 2.3.3.3).
- Right-click *outside* the list and choose ACTIVE QUEUES ONLY to only see queues with calls or SELECT QUEUE to select the queues to be displayed.
- Right-click *on a queue* to see two options: see the AGENTS IN QUEUE, and to see the CALLERS IN QUEUE (chapter 2.3.3.3).

2.3.3.3. Information Window: Queue

This window shows the people waiting in a specified queue. To add the window, go to the menu VIEW and select “Queue”. You have to select a company and a queue

within this company. A new Information Window will open. If you would like to dock this window, follow the instructions from chapter 2.3.2.1. The overview contains:

- From: the name of the caller
- Dialed: the number the caller dialed (queue's extension)
- Status of the call.
- The call's destination (in this case the name of the queue)
- Waiting time

Additional settings and actions

Right-click on a caller to see additional information or preform additional actions.

- Select HANGUP... to remove a caller from the queue and end the call.
- TRANSFER... remove the caller from the queue and transfer it to the given number.
- Select CALL HISTORY OF THIS CALL to see how the the call ended up in this queue.
- Select CALLER INFORMATION to see information about this caller.
- Set the STATUS INFORMATION of the employee.
- UNCONDITIONAL CALL FORWARD. Transfer all calls¹² to the given option.
- CALL FORWARDING WHEN BUSY. Transfer calls to the given option this person is on the phone.
- CALL FORWARDING WHEN NO ANSWER. Transfer calls to the given option when this phone is not answered.

¹² If not set to "ring phone" it will forward all calls and other call forwarding options like 'when logged off' are ignored.

Setting Up the Application

- CALL FORWARDING WHEN LOGGED OFF. Transfer all calls to the given option when the employee is not logged in.

Actions

- Click on the button CLOSE QUEUE to close the queue. No calls will be accepted by the queue. To open the queue, click the button again.
- The EMPTY QUEUE button removes all calls from the queue. The calls will follow the queue's forwarding settings.
- Left-click and drag the caller to a person in the employee list or to another queue to transfer the call.
- To redirect a waiting caller from the queue to your phone, double click on the name. Your phone will switch to hands free and you will be connected to the caller.

2.3.3.4. Information Window: Agent queue

This window shows the agents for the selected queue. To add the window, go to the menu VIEW and select AGENT QUEUE. You have to select a company and a queue within this company. A new Information Window will open. If you would like to dock this window, follow the instructions from chapter 2.3.2.1. The overview contains:

- Extension: the agent's availability icon (see table 2) and extension.
- Agent: the agent's name.
- State: agent's current state, like "available", "connected" or "logged off". The agent's state is also be represented by a background color:
 - logged off: gray background
 - connected: blue background
 - ringing: green/orange blinking background
 - dialing: red background

- queue pause: yellow background

Actions

- Click on the button CLOSE QUEUE to close the queue. No calls will be accepted by the queue. To open the queue, click the button again

2.3.3.5. Information Window: Conference list

This window shows the conference boxes for the selected company. To add the window, go to the menu VIEW and select CONFERENCE LIST. You have to select a company. A new Information Window will open. If you would like to dock this window, follow the instructions from chapter 2.3.2.1. The overview contains:

- Name: the conference box's name.
- Extension: the conference box's extension.
- Parties: the number of callers in this conference.

Actions

- Double-click on the name to see the callers within the conference box (see chapter 2.3.3.6)

2.3.3.6. Information Window: Conference

This window shows the callers within a specified conference box. To add the window, go to the menu VIEW and select CONFERENCE. You have to select a company and a conference box. A new Information Window will open. If you would like to dock this window, follow the instructions from chapter 2.3.2.1. The overview contains:

- Name: the caller's name.
- Extension: the caller's box's extension.
- Company: the caller's company
- Department: the caller's department

Setting Up the Application

2.3.3.7. Information Window: Parking lot list

This window shows the parking lots for the selected company. To add the window, go to the menu VIEW and select PARKING LOT LIST. You have to select a company for which you would like to see the parking lots. A new Information Window will open. If you would like to dock this window, follow the instructions from chapter 2.3.2.1. The overview contains:

- Name: the parking lot's name.
- Extension: the parking lot's extension
- Parties: number of callers on hold

Actions

- Double-click on the name to see the callers waiting on this parking lot (see chapter 2.3.3.8)

2.3.3.8. Information Window: Parking lot

This window shows the callers within the selected parking lot. To add the window, go to the menu VIEW and select PARKING LOT. You have to select a company and a parking lot. Now a new Information Window will open. If you would like to dock this window, follow the instructions from chapter 2.3.2.1. The overview contains:

- FROM: the employee who parked the call.
- LINE: the caller's name and/or phone number
- PARKING LINE: call this number to answer the call.
- WAITING TIME: the time the caller is parked.

2.3.3.9. Information Window: Trunk List

This window shows a list of trunks for the selected company. To add the window, go to the menu VIEW and select TRUNK LIST. You have to select a company first. Now

a new Information Window will open. If you would like to dock this window, follow the instructions from chapter 2.3.2.1. The overview contains:

- The trunk's NAME
- INCOMING, total simultaneous calls at this moment.
- OUTGOING, total simultaneous calls at this moment.

Actions

- Double-click on a trunk name to open a new window for this specific trunk (see 2.3.3.10).
- Right-click in the list and choose “Active trunks only” to see only queues with active calls.

2.3.3.10. Information Window: Trunk

This window shows calls within a selected Trunk. To add the window, go to the menu VIEW and select TRUNK. You have to select a company and a trunk. Now a new Information Window will open. If you would like to dock this window, follow the instructions from chapter 2.3.2.1. The overview contains:

- The CALLER ID SENDER: the caller's caller id as send by Voclarion® to the telecom provider.
- The CALLED NUMBER as send by Voclarion® to the telecom provider.
- LINE: the call's status, like 'dialing' or 'connected'.
- The DESTINATION of this call: the name/phone number of the person who answered the call.

Actions

- Double click on a call to connect the call to your phone. Your phone will ring and the phone call is connected to you.
- Right-click and choose HANGUP to hangup the call.

Setting Up the Application

- Right-click and choose CONNECT TO to transfer the call to another extension.
- Right-click choose CALL HISTORY to how the call was forwarded.
- Or left-click and drag the name to another person or queue to transfer the call.

2.3.3.11. The BLF Panel

The BLF panel¹³ is a graphical representation of employees from a company. All employees are represented by a collection of buttons, which change color depending on the current status. So you can easily see who is available. By clicking on the buttons you can perform different tasks.

To add the window, go to the menu VIEW and select BLF WINDOW. You have to select a company from which you would like to see employees. Now a new Information Window will open. If you would like to dock this window, follow the instructions from chapter 2.3.2.1. The button size will change according to the size of the window. The icon and background color indicate the status of the person, see the table on page 36).

13 The BLF panel refers to the Busy Lamp Field, a busy lamp field is an array of line status lamps. A busy lamp field allows the operator to see the status, e.g., busy or available, of the stations.

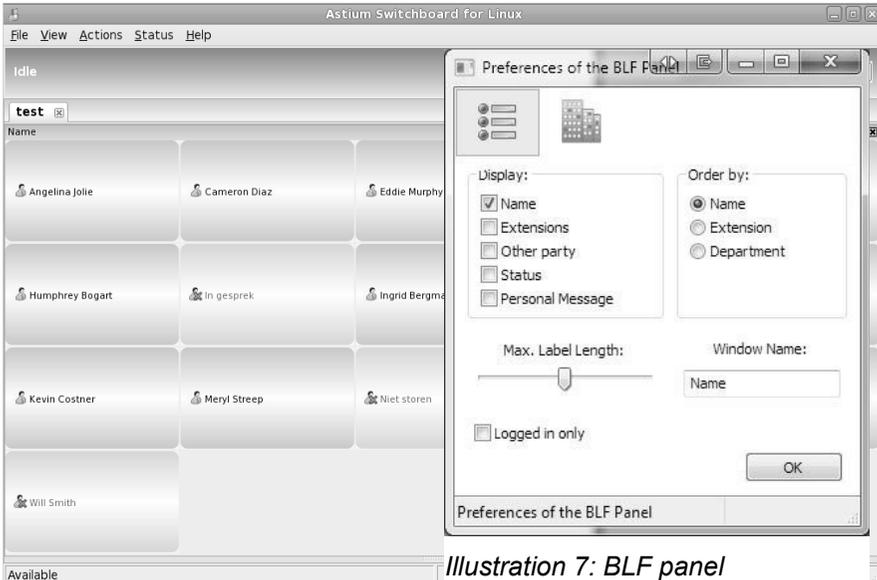


Illustration 7: BLF panel preferences

Illustration 6: BLF Panel **Setting up BLF**

The information on the buttons can be changed. Right-click one of the buttons and select SETTINGS FOR THIS BLF PANEL. An dialog box will pop up containing two tabs: "BLF PANEL" and "DEPARTMENTS". Here you can:

- Change the information you would like to see on a button like name, extension, caller and presence status. Select one or more options and the button will adjust according to your selection.
- Change the button sort order to Name, Extension or Department by clicking on one of the options.
- Set the maximum label length of a button.
- Change the name of the window.
- Hide persons who are logged out.
- Select the departments you wish to see from the DEPARTMENTS TAB.

Setting Up the Application

View information

There is a lot of information stored in the BLF panel. Let's start with a look at the panel itself. On the panel you see a collection of buttons, representing your colleagues (illustration 6). The icon and background color indicate the status of a person, as shown in the table on page 36).

Details

To see more detailed information about a colleague, you can right-click on a button. The context-menu appears.

- To access an employee's calendar, select CALENDAR. For more information see chapter 2.4.1.
- VOICEMAIL. Shows the number of voice mails for this employee.
- Select E-MAIL to send an email to the employee.
- To call an employee's mobile phone select CALL ON MOBILE
- Select BLIND TRANSFER TO to transfer the current call to this employee.
- Set the employee to Do Not Disturb.
- Set the STATUS OPTIONS of the employee.
- UNCONDITIONAL CALL FORWARD. Transfer all calls¹⁴ to the given option.
- CALL FORWARDING WHEN BUSY. Transfer calls to the given option this person is on the phone.
- CALL FORWARDING WHEN NO ANSWER. Transfer calls to the given option when this phone is not answered.
- CALL FORWARDING WHEN LOGGED OFF. Transfer all calls to the given option when the employee is not logged in.

14 If not set to "ring phone" it will forward all calls and other call forwarding options like 'when logged off' are ignored.

- QUEUES shows the queues this person is agent for.

BLF panel actions

There are a few actions you can perform, while using the BLF panel.

- **Set up a phone call.** Left-click on a button. Your phone will ring and when you pick up the phone¹⁵, your colleague will be called and a phone conversation is set up.
- **Transfer a call with consultation.** When in a phone call, click a button. The call is put on hold and a new call is setup with the selected colleague. When you disconnect, your first call is connected to your colleague.

2.3.3.12. Information Window: Analog Clock

This window shows an analog clock for the selected company. To add the window, go to the menu VIEW and select ANALOG CLOCK. You have to select a company first. Now a new Information Window will open. If you would like to dock this window, follow the instructions from chapter 2.3.2.1.

¹⁵ If you have connected a headset to your phone, the phone can go automatic to handsfree mode and will directly call the other party. This depends on how your phone is set up.

2.4. Everyday Use of the Voclarion® Switchboard

The switchboard starts automatically each time you start your computer. To disable this, remove the switchboard from the startup folder.

2.4.0.1. Dial a Phone Number

There are a few ways to dial a phone number or extension:

- I. Double-click on a name.
- II. To call a colleague right-click on a colleague in an employee list and choose CALL ON MOBILE
- III. Open the phone book (F7), select a person and press ENTER.
- IV. Type an extension or an external phone number in the DIAL FIELD. (illustration 3/3) and press ENTER.

Your phone will ring. When answered, the Voclarion® dials the selected number. If your phone has no free lines available, the action is discontinued.

2.4.0.2. Transfer a call

There are many ways to transfer a call.

- Right-click on an employee's name and select BLIND TRANSFER TO... to transfer the current call to this employee.
- Right-click on an employee's name and select CONNECT TO.. transfers the employee to a given number. When the employee answers the phone, he will be connected to the given number.
- You can connect the current call to a colleague by dragging the icon of the caller¹⁶ to an employee's icon. When you release the mouse button, the call is transferred.

¹⁶ From a queue or a trunk for example.

- To transfer the current call (with consultation):
 - double-click on the colleague's name
 - consultation
 - press SPACE to transfer the call to the colleague.
- To transfer the current call (with consultation) using the phone book:
 - press F7 to go to the dial widget
 - press F7 to go to the phone book, and press F7 to change phone books.
 - Use the arrow keys to scroll, type to shorten the list and press space to call the selected person.
- To transfer your call with blind transfer using the phone book:
 - press F8 to go to the dial widget
 - press F8 to go to the phone book, and press F8 to change phone books.
 - Use the arrow keys to scroll, type to shorten the list and press space to call the selected person.

2.4.0.3. Call Forwarding settings



This option *only* changes the “Default Call Forwarding” settings. Use the Voclarion® PBX Manager to change Call Forwarding for other contact types, like “Internal”. Please note when testing:

- If internal call forwarding is set, Voclarion® will follow these settings for all internal calls, no matter what you set on the Switchboard.
- A user's mobile phone is also an internal call.

For more information, consult the configuration manual.

Everyday Use of the Voclarion® Switchboard

To set or change the call forwarding settings for default calls, right-click on the Voclarion® Switchboard program icon, located on the system tray¹⁷ (illustration 8). A small menu appears from which you can set call forwarding:

- When busy
- When not answered
- When logged out
- Unconditional (all calls)¹⁸

For each you can set the following call forwarding modes:

- Phone Rings (default):
your phone rings so you can pick up the phone and make a phone call.

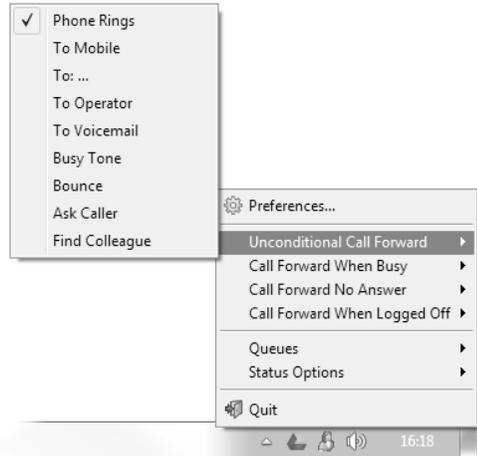


Illustration 8: Call Forwarding settings

- To Mobile: forward calls to your mobile phone. Only use this option if your mobile phone number is set. Otherwise the call will bounce.
- To Operator: forwards the call to the department or company¹⁹ receptionist.
- To Voice Mail: forwards calls to your voice mail. Only use this option if your voice mail is set. Otherwise the call will bounce.
- To ...: set an extension or an external phone number to forward calls to.
- Busy Tone: gives a busy tone.
- Bounce: bounces the call back to the Voclarion® and let the Voclarion® decide what to do according to the dial plan.

¹⁷ In most operating systems located next to the clock on the bottom of your screen.

¹⁸ If this setting is other than “Phone Rings” all other call forwarding settings are ignored.

¹⁹ If no department receptionist is defined calls will be forwarded to the company receptionist.

- **Ask Caller:** plays a menu so the caller can choose on how to contact you. Ask Caller is set from the Voclarion® PBX Manager.
- **Find Colleague:** uses the Colleague Search List to connect the call to a colleague. The Search List is set from the Voclarion® PBX Manager.

To change call forwarding settings, you can also right-click on your name or icon from the employee list. An Operator can change call forwarding settings of colleague's.

2.4.0.4. Queues

The Voclarion® Switchboard can be used to change your queue settings. Right-click on your name (for example from the employee list) or on the program icon in the system tray²⁰. Choose Queues to see an overview of all queues. Click on a queue to login or logout on a queue. A ✓ indicates you are currently logged in to this queue.

Queue pause

Press **F9** to activate queue pause. Or click on the taskbar on *Actions > Queue Pause*. You will no longer receive any phone calls from queues, only direct calls. The action bar colors red and on the status bar (illustration 3/5) the word "PAUSED" blinks to indicate queue pause is activated. Press **F9** again to leave queue pause.

2.4.1. Outlook Exchange Agenda

Within the Switchboard you can access a colleague's Outlook calendar²¹. You can lookup appointments and create new appointments, depending on your rights.

2.4.1.1. Setup

Before you can open a calendar of a colleague, you have to make a few simple settings.

²⁰ In most operating systems located next to the clock on the bottom of your screen.

²¹ Microsoft Exchange with web access is required. This software is not a part of Voclarion®

Everyday Use of the Voclarion® Switchboard

1. Add the calendar URL to the Switchboard settings, as described on chapter 2.2.3.
2. Create a new tab.
3. Add a Calendar Window and lock it to the tab. This window will be used to display the calendar.

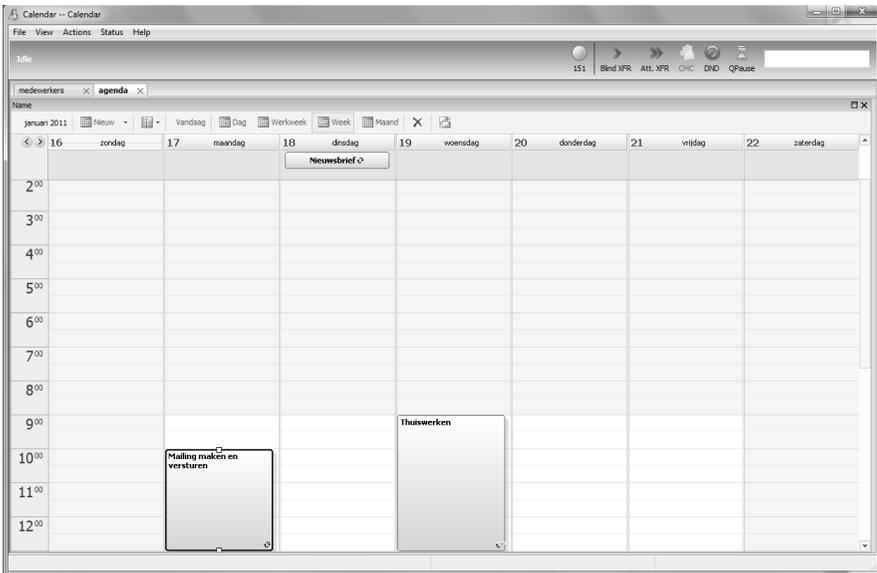


Illustration 9: Outlook calendar

2.4.1.2. Access the Calendar

To access a calendar, go (for example) to the employee overview. Right-click on an employee and select Calendar. It will appear in the window created in the previous paragraph²². Depending on the permissions, you can see appointments and make changes. See the Microsoft Outlook Exchange manual for more information on how to use the calendar.

2.4.2. Operator Panel

The Operator Panel is a special Information Window, designed for operators who have to process large quantities of phone calls. To add the panel, go to the menu VIEW and select “Operator Panel”. You have to supply a name for the new window and you have to select one or more companies from which you would like to manage the calls. A new Information Window will open. If you would like to dock this window, follow the instructions from chapter 2.3.2.1.

²² The first time you access a Calendar, Outlook Web Access will ask you to login. Use your regular Outlook login. The Calendar will appear.

Everyday Use of the Voclarion® Switchboard



To use the Operator Panel, you need to have “Switchboard Receptionist” permissions. If these are not set, the Operator Panel will not work.

Permissions can be set from the Voclarion® PBX Manager.

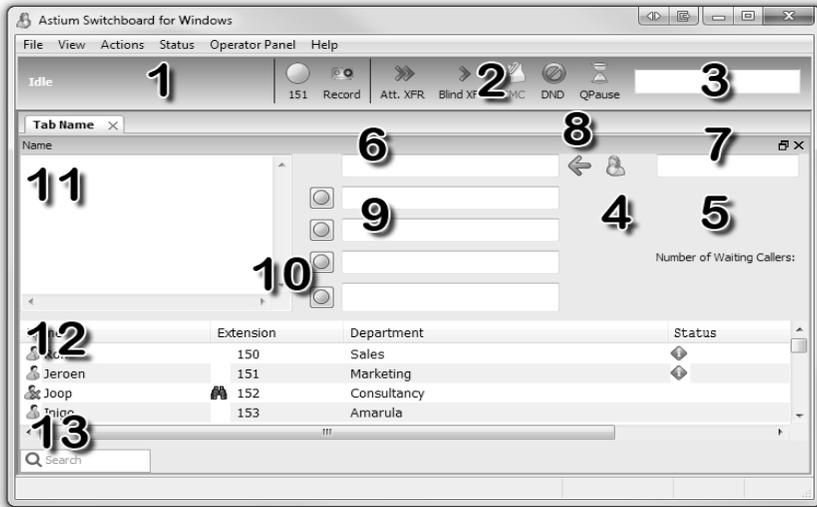


Illustration 10: Operator Panel

Note you can open only one Operator Panel for each Switchboard. Illustration 10 shows a maximized Operator Panel.

1. *Phone status*. Shows information about a current action. You are logged in correctly if it states “Idle”.
2. *Top menu*. Contains button for frequently used functions, depending of user permissions.
3. *Dial field*. Used to dial a phone number. Type a phone number and press **ENTER** to call this number. By default your phone will switch to hands free, the number will be dialed and you will be connected to this phone number.
4. *Operator icon*. This icon represents the operator. When the icon is looking left you are connected to a incoming call. If it is looking right you are placing a outgoing call.
5. *Waiting callers*. The number of waiting callers.

6. *Active call.* The name / number of the current call. If the information is gray, the call is on hold.
7. *Outgoing call.* This field for outgoing calls shows the extension/number of the call that is set up by the operator.
8. *Call selector.* You can use the green arrow on the screen to select calls from the parking fields (illustration 10/9) or the active call (illustration 10/6). Use the arrow keys on your keyboard to move the green arrow and press the SPACE BAR to be connected to the selected caller.
9. *Personal parking queue.* The four fields below the active call field represents the personal Parking Queue. Here callers are parked. Retrieve a caller by moving the arrow to the caller and pressing the SPACE BAR.
10. *Call indication lamp.* Indicating lamps turn red when a call is parked. Click with the mouse on the lamp to retrieve the call or use the green arrow key to select the parked call and press the space bar.
11. *Call Details.* This field shows detailed information about the selected call.
12. *Employee List.* Overview of employees. Click on a column title to sort the list along that column. Right-click to change the appearance of the list as described before (Employee List, see page 34) or to setup a call with a colleague. The Employee can contain additional columns according to the user fields settings.
13. *Search field.* While typing the list will narrow down.

Quickly you will notice there is more than one way to perform certain tasks. Just pick the one that works best for you.

2.4.2.1. Noticing an Incoming Call

When someone calls, you see the following happen in the Switchboard:

- The indication lamp on the top menu (illustration 10/2) blinks.
- On the left you see *Incoming Call From* (name/number of the caller) (illustration 10/1)
- The Switchboard icon in the task bar below the screen blinks.

2.4.2.2. Answering a Call

To answer an incoming call preform one of the following actions. It is not necessary to perform any action on the phone. The call first in line of the queue will be answered. Your phone will automatically switch to intercom/headset mode and you can speak to the caller. The caller information will appear in the call field (illustration 10/6).

- Press the SPACE BAR.
- Left-click on the flashing indication lamp to the left of the dial field (illustration 10/2).

2.4.2.3. Ending a Call

To end a selected call do one of the following:

- Press CTRL-SPACE BAR
- Left-click on the red indication lamp to the left of the dial field (illustration 10/2).

2.4.2.4. Parking a Call

To put the current call on hold, press F8. The call will be put in the personal Parking Queue.

2.4.2.5. Retrieve a parked call

To retrieve a parked caller from the personal parking field, preform one of the following actions: p

- Use the mouse to press on the red indication lamp in front of the call on hold (illustration 10/10).
- Or use move the green arrow to select the right call on hold and press the space bar (illustration 10/8).
- Or to retrieve:

parked caller #1: press **F1**

parked caller #2: press **F2**

parked caller #3: press **F3**

parked caller #4: press **F4**

If all parking queue fields are full the queue still accepts calls, however the calls are not visible yet.



Before putting your active call on hold, make sure you do not have another call on hold at the outgoing field (illustration 10/7). Pressing the enter key connects both calls instead of putting the active call on hold.

2.4.2.6. Transferring a Call

To transfer a call, without using the phone book, follow the steps below. The phone book will be discussed in paragraph 2.4.2.8.

To do a **blind transfer**, take one of the following actions:

- From your keyboard (1):
 1. Answer a call as described above.
 2. During the call, press F8
 3. A new window will appear. Enter the phone number or use the phone book to lookup a contact.
 4. Press ENTER to transfer the call. Or press CANCEL to cancel the transfer. The call will be resumed.
- From your keyboard 2:
 1. Enter a phone number into the Dial Field (illustration 10/3).
 2. Press F8.

Everyday Use of the Voclarion® Switchboard

- Mouse:
 1. Right-click on a employee's name and select BLIND TRANSFER TO...

To do a **attended transfer**, take one of the following actions:

From the keyboard (1):

1. Double-click on a employee's name, OR, enter the colleague's phone number in the Dial Field (illustration 10/3) and press ENTER. The phone number will appear in the field on the right for outgoing calls (illustration 10/7) and the number will be dialed.
2. Once connected, you can announce the transfer. You can use the LEFT AND RIGHT ARROW KEYS of your keyboard to switch between both callers as much as you may need to.
3. To connect the two calls press the SPACE BAR.

From your keyboard (2):

1. Enter a phone number into the dial field
2. Press F7.

2.4.2.7. Phone book

The Switchboard can access the Voclarion® phone books. You can use the phone books to make phone calls or to transfer calls.

Switch phone books

To open the phone books and cycle trough them, press several times

- F7 for consultation transfer
- F8 for blind transfer

Search for a contact

Once opened a phone book, press F5 (or click on the search field) to go to the search field. You can now start typing to narrow down the list of numbers.

2.4.2.8. Transferring a call, using the Phone Book

- To blind transfer a call:
 1. Answer a call as describes before.
 2. Press F8. The Blind transfer window will pop up.
 3. Press F8 to cycle between phone books.
 4. Type a name in the search field, to narrow down the list.
 5. Press enter (or left-click on a name) to dial the selected person.
 6. The call is transferred.

- To transfer with consultation:
 1. Answer a call as describes before.
 2. Press F7. The transfer window will pop up.
 3. Press F7 to cycle between phone books (see illustration 11).
 4. Type a name in the search field, to narrow down the list.
 5. Press enter (or left-click on a name) to dial the selected person.
 6. Announce the call.
 7. Press SPACE.
 8. The call is transferred.

Everyday Use of the Voclarion® Switchboard



Illustration 11: Transfer a call using the phone book

2.5. Other features

The Switchboard contains some features which are not part of the user interface. We will discuss those in this chapter.

2.5.1. Dial a phone number from the Clipboard

With one key press the Switchboard can dial a phone number from the clipboard. This feature is only available in Microsoft Windows.

First you have to select a hot key. The hot key starts the dialing of the stored phone number. How to select a hot key is explained in paragraph 2.2.3. From now on every time the Switchboard starts, the given hot key is registered.

1. Select a valid phone number with your mouse from any application. Press CTRL-C to copy it to the clipboard (memory).
2. Press the hot key from any application. A dialog appears asking you to confirm the dialing of the number. Press OK to precede.
3. Your phone will ring. If you pickup the phone, the PBX will call the selected phone number and sets up a conversation.

2.6. Closing the Voclarion® Switchboard

There are a few different ways of closing the application. If you run an OS other than Windows 7, buttons may be located elsewhere.

- Select QUIT from the file menu.
- Select QUIT from the system tray menu (right-click, illustration 8 on page 51).
- Press CTRL-Q.

The Voclarion® Switchboard will now close and stop running. You can restart the application from the start menu.

Click on the X on the top right of the application window. The Voclarion® Switchboard now minimizes to the system tray, but will continue running. Click on the icon located in the system tray to maximize the application.

Illustration Index

Switchboard preferences.....	24
Switchboard preferences.....	29
Switchboard main window.....	30
Moving a window to the left to dock.....	33
Employee List.....	35
BLF Panel.....	46
BLF panel preferences.....	46
Call Forwarding settings.....	51
Outlook calendar.....	54
Operator Panel.....	55
Transfer a call using the phone book.....	61

Index Of Tables

Icons used in this document.....	13
User availability icons.....	36
Call Forwarding settings.....	37

Alphabetical Index

A

Appointments.....	52
Asterisk.....	10

B

BLF.....	45
Busy.....	51

C

Calendar.....	52
Call forward.....	34
Call Forwarding.....	50
Call forwarding settings.....	34
Caller ID.....	15
Company.....	15
Department.....	15
Extension.....	15
Priority.....	15
Trunk.....	15
User.....	15
Calling number identification.....	14
Clipboard.....	28, 62
Clock.....	48
Colleague Search List.....	52
Configuration check.....	29
Context menu.....	34

D

Do not disturb.....	34
---------------------	----

E

Electronic Private Automatic Branch eXchange.....	10
Email.....	34
Employee List.....	34
EPABX.....	10
Extension.....	10

H

Hold.....	57
Hostname.....	25
Hot key.....	62

I

Information Window.....	32
-------------------------	----

Installation.....	23
O	
Operator.....	51, 55
Operator panel.....	22
Outlook.....	34, 52
P	
PABX.....	10
Parking.....	57
PBX.....	10
Port.....	25
POTS.....	14
Preference.....	24
Private Automatic Branch eXchange.....	10
Private Branch eXchange.....	10
Q	
Queue.....	39, 52
Paused.....	52
Queues.....	34
Quit.....	63
R	
Receptionist.....	55
Requirements.....	23
S	
Screen saver.....	27
Settings.....	24
T	
Tab.....	32
Transfer.....	58
Trunk.....	44
V	
Voicemail.....	34
W	
Wildcards.....	16
Switchboard.....	22