Allworx Call Assistant 2.4 Quick Reference Guide

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communications without compromise

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1 Introduction

The Allworx Call Assistant is a graphical application intended to be used by an individual functioning in the role of an operator or receptionist. Call Assistant allows operators and receptionists to monitor the state of every line in the system and dispatch calls by answering, transferring, parking or sending them to voicemail.

Call Assistant is a fully-integrated PC software tool. When licensed on the Allworx server, the intuitive design works in combination with any Allworx IP phone.

Call Assistant is easy to operate so you will be confident using most of its features after just a few minutes without reading a reference manual! This quick start guide will get you started and give you instructions on a few areas on which you might need help.

2 Logging In

When starting Call Assistant, log in with the username that was assigned to you on the Allworx server and with your voicemail password. Most users can set up the server address by using the automatic Search button to find the server.

When you are logged in, the Presence display on your phone will be surrounded by dashes (e.g. -In Office-).

3 Views

The Call Assistant application has three distinct work areas or views: My Calls, Switchboard, and Outside Lines (if applicable). Each view, explained in a separate section, displays call information and expedites call handling.
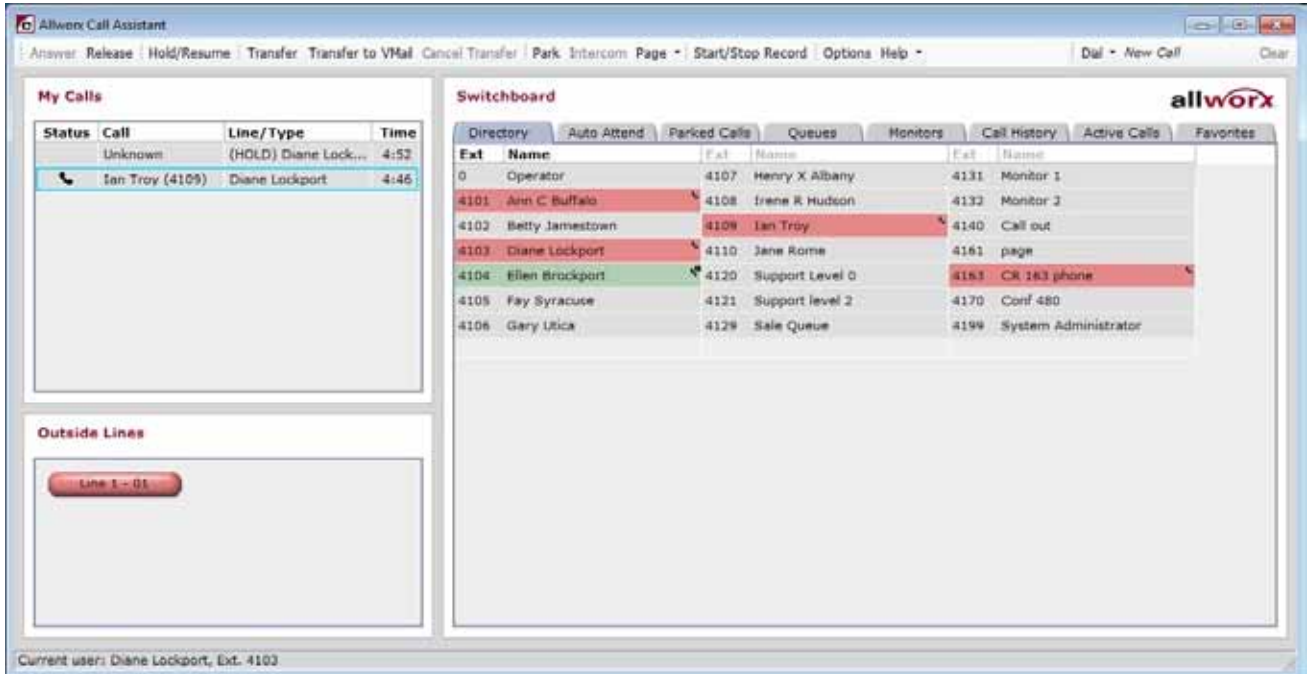
Note: The application window and each of the views can be resized. To resize the view, place the mouse on the boundary and click-and-drag the boundary to the desired size.

When you receive an incoming call, the phone will ring and the call will be displayed in the My Calls area. To answer, do one of the following:
- · Double-click on the call
- · Click on the call and then click the Answer button in the toolbar
- · Right click on the call and then select the Answer option

Most of the other buttons on the toolbar operate the same way: Select an object to be acted upon (for example, a call) and then click the action button (for example, Release).

Using the Call Assistant does not prevent you from using the phone's keys, when that is more convenient.

3.1 My Calls View

My Calls shows all calls currently being handled at the user's extension. The calls are ordered with the oldest calls at the top. The calls that are directed to the My Calls view are all calls that ring the user's phone's programmable function keys (PFK) and Call Assistant Appearances. This includes Call Appearances, Line Appearances, Queue Appearances, ACD Appearances and Call Monitors.

The My Calls View shows the following fields:

- Status – The phone icon will show if the call is:
    - Ringing –
    - Active –
    - Being Recorded –
    - On Hold– *(blinking)*
    - Ended –

- Call – Displays Caller-ID information such as name and number, if available.

- Line / Type – Displays the Line or Call Appearance that the call came in on or when out on and information such as that the call is on hold.

- Time – Shows the elapsed time of the call.

Note: The column width for each field can be changed by clicking on the boundary line between field names and dragging it to a new position.

The following actions can be initiated on the calls:

- Answer
- Release
- Hold / Resume
- Transfer
- Transfer to Voicemail
- Park
- Start / Stop Record (when available)

3.2 Switchboard View
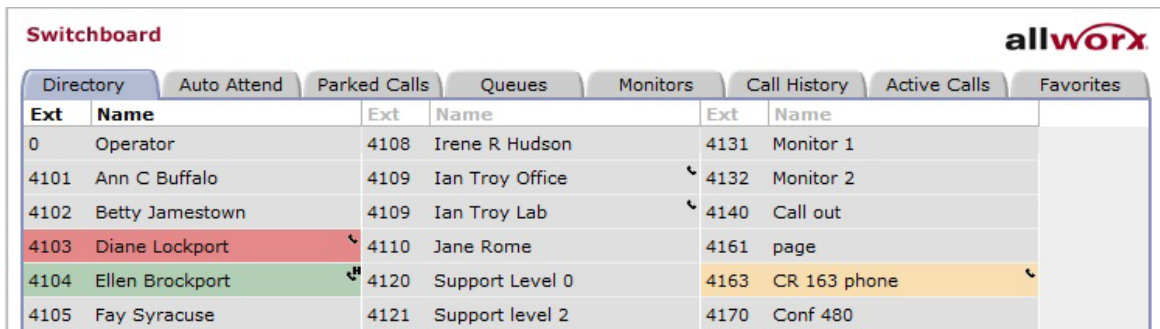
The Switchboard view is a tabbed area showing the Company Directory, Auto Attendants, Parked Calls, Call Queues, Call Monitors, Call History, Active Calls and Favorites.

- Directory – displays all extensions configured in the Allworx system. Each box shows the extension number and user's name (or description).

Switchboard   **allworx**

| Directory | Auto Attend | Parked Calls | Queues | Monitors | Call History | Active Calls | Favorites |

Ext	Name	Ext	Name	Ext	Name
0	Operator	4108	Irene R Hudson	4131	Monitor 1
4101	Ann C Buffalo	4109	Ian Troy Office	4132	Monitor 2
4102	Betty Jamestown	4109	Ian Troy Lab	4140	Call out
4103	Diane Lockport	4110	Jane Rome	4161	page
4104	Ellen Brockport	4120	Support Level 0	4163	CR 163 phone
4105	Fay Syracuse	4121	Support level 2	4170	Conf 480

Extensions display phone icons ☎ when assigned as the internal caller ID of an Allworx IP or analog handset. Hot desk phone icons ⤵ are displayed for users logged into Allworx IP handsets. The phone icon will be removed from the user's original extension entry. For extensions that are assigned to more than one handset, entries are displayed for each of the handsets. In the above example, there is an entry for both Ian Troy's office phone and his lab phone.

The current status of each Allworx IP or analog handset is shown through the use of color:

Color	State
Green	Ringing
Red	Active
Gray	Idle
Amber	Do Not Disturb

Note: Extensions for non-Allworx handsets will always be gray.

Each entry will display the following mouse fly-over hints:
- Handset state (extensions assigned to Allworx IP and analog handsets only)
- Extension
- Name (or description)
- Presence (user extensions only)

The System Administrator can limit or remove the visibility of handsets within the Directory tab. The following settings are available, on the server Admin page:
- Normal – handset extension and status are visible.
- Hide Status - handset extension is visible but its status is suppressed.
- Hide Completely – handset extension and status are not visible.

The Directory tab can be used to dial, answer a ringing call or transfer calls to the listed extensions.

· Auto Attend – lists all of the Auto Attendants configured on the Allworx system. This allows for the transfer of calls by selecting Transfer on the toolbar then the desired Auto Attendant.

· Parked Calls – lists all calls currently parked. Parked calls can be picked up by double-clicking on them.

· Queues – displays all the Call Queues with corresponding descriptions and distribution mode. The user can observe how many calls are currently waiting in each queue, see the duration of the longest waiting call, and pick up queued calls by double-clicking on the queue.

Switchboard

Directory	Auto Attend	Parked Calls	Queues	Monitors	Call History	Active Calls	Favorites

Call Queue	Mode	Longest Wait	Queue Volume
Queue 2	Ring All		
Queue 3	Ring All		
Queue 4	Ring All		
Queue 5	Ring All		
Queue 6	Ring All		
Sale Queue	Ring All		
Service	Ring All		
Support Level A	Linear Priority		
Support Level B	Round Robin		
Support Level C	Longest Idle Fairness	0:39	

Support Level C Agent Details

Agent	Status	Duration	Active Queue
Ann C Buffalo	Wrap-up	0:04	
Diane Lockport	Active	1:13	Support Level C
Ellen Brockport	Busy	3:07	
Fay Syracuse	Logged Out		

Users designated as queue supervisors can view the agent details for queues assigned an ACD distribution mode (linear priority, round robin or longest idle/fairness) by selecting the queue. Assigned agents are displayed with current status, duration of status and their currently active queue.

· Monitors – shows how many calls are currently in each monitor and allows any call to be answered by double-clicking on the monitor.

· Call History – lists all of the user's previous calls. Included in the list are completed calls, missed inbound calls, and unanswered outbound calls. If the Caller-ID is available in the Call History record, then the number can be called by double-clicking the entry or by using the

other various dialing methods. Only calls that were completed when Call Assistant was open are displayed.

- Active Calls – lists active calls on the Allworx system. When the information is available, the active call information includes: start time, duration, originating caller ID and destination caller ID. The System Administrator can modify users' access to the Active Calls display. The following settings are available:
    - o Not Displayed – the Active Calls tab is disabled.
    - o Brief Display (No Caller ID) – start time and call duration are displayed, caller-ID fields display *Private*. This is the default setting.
    - o Full Display (with Caller ID) – displays all available fields.

- Favorites – behaves similarly to the Directory tab but with the ability to choose which extensions to display as well as the ability to add external numbers. The Favorites tab can include any of the following items:
    - o User Extensions
    - o System Extensions
    - o System Speed Dial Numbers
    - o Auto Attendants
    - o Call Queues
    - o Call Monitors
    - o Custom External Phone Numbers

3.3 Outside Lines View

If your handset configuration on the Allworx server is set up for Line Appearances, all incoming lines will show up in the Outside Lines area. Placing calls using the outside lines can be done by selecting the desired outside line button and entering the number in the Dial Pad. Each line button shows the status through the use of color:

Color	State
Green	Ringing
Red	Active
Gray	Inactive

4   Product Features / Toolbar Options

Toolbar options are enabled or disabled based on the status of the call currently selected in the My Calls view or Call History tab. To perform any of the call options on the Call Assistant toolbar, a call must be selected. The selected call is indicated with a blue border.

Inbound call unselected

Active call selected

4.1   Answer

An inbound call will be displayed in the My Call view as ringing. This call can be answered by two methods:

1.   Select the ringing call in My Calls view and then select Answer on the toolbar

    or

2.   Double click on the ringing call in My Calls view.

4.2   Release

End or drop the selected call in My Calls view.

4.3   Hold/Resume

When a call is placed on Hold, the Resume toolbar option can be used to return to this call. The call indicates Hold in My Calls view with a blinking call icon in the status column.

4.4   Transfer

Calls can be transferred to another extension by performing either a blind transfer or attended transfer using Call Assistant.

Blind transfer – transfers to a targeted extension without an announcement:

1. Click Transfer on the toolbar.

2. Click the targeted extension in the Directory, Auto Attend, Queues, Monitors or Favorites tab.

   Note: Alternatively, the Transfer operation can be performed by dragging the call to the destination on one of the five tabs.

3. The call status changes to 'Ended' in My Calls view and is eventually removed from the view.

Attended transfer – transfer to a targeted extension with an announcement to the target user:

1. Place the call on Hold by selecting Hold option on the toolbar.

2. Dial or intercom the targeted extension so they are aware of the transfer.

3. Place the targeted party on hold.

4. In the My Calls view select the original call (on hold) to be transferred.

5. Click Transfer on the toolbar.

6. Click the targeted extension call in My Calls view.

7. The call is immediately removed from My Calls view. The targeted extension call status changes to Ended, and then is removed from My Calls view.

4.5 Transfer to Voicemail

The user can transfer a call directly to a user's voicemail with the Transfer to VMail option on the toolbar.

4.6 Cancel Transfer

After Transfer or Transfer to Voicemail has been selected, selecting this option will terminate the transfer operation and resume the call.

4.7 Park

The Park option places a call on hold to one of the designated parking extensions (701 through 709)[†]. Parked calls can be retrieved by any handset in the system or by the Call Assistant using the Park tab.

4.8 Intercom

Allworx phones on the same system can be used as intercoms by using the Intercom option.

[†] Extensions may vary per system.

1. Select the targeted extension in the Directory view.

2. Select the Intercom toolbar option.

3. The phone will announce the connection by ringing. After the ring, begin speaking.

4. The person you called will hear you over the speaker.

When the Intercom option is used with non-Allworx handsets, it places a call to the phone rather than acting as an intercom.

4.9 Page
The Call Assistant user can broadcast a message to multiple phones using the Page option.

Broadcast a message to any of the Allworx system paging zones by selecting one from the drop-down menu under the Page toolbar option. This broadcast will go to the extensions assigned to that paging zone. If you click the Page button rather than pulling down the zone list, the first paging zone in the list will be used.

4.10 Start/Stop Record
Calls can be recorded and saved as WAV files. Recordings can be played in Windows Media Player and other popular media player programs. Each recording is saved in a folder named Recorded Calls in the user's My Documents folder. File names are composed of the date and time of the recording.

Start Recording – To record the call that is selected in the My Calls view, select the Start/Stop Record option or right-click on the call and choose Start or Stop Recording from the pop-up menu.

Stop Recording – To stop recording, select the Start/Stop Record toolbar option or right-click on the call and choose Start or Stop Recording from the pop-up menu. Recording will stop automatically if the call is released, parked, or transferred. It is possible to pause recording by selecting Start/Stop Record. To restart recording, select Start/Stop Record, again. Recording will pause when a call that is being recorded is put on hold. To restart recording of a held call after it is resumed, select Start/Stop Record, again. A beep will be inserted into the audio file each time a recording is resumed.

Options – Under the Options menu on the toolbar, users can change the folder in which to save recordings, choose the audio compression format, and set the recording volume.

Limitations – When recording is in progress, 3-way Conference calling is disabled. Conversely, if a Conference call that is hosted by the Call Assistant user is already in progress, recording will be prevented. However, conference calls that are set up using the Conference Center or 3-way Conference calls that are hosted by one of the other participants can be recorded.

4.11 Options
Call Recording Options – the following options can be set for Call Recording:
· Select the audio file folder location

- · Set the audio file compression format (G.711 u-law or PCM)
- · Set the recording volume level

Switchboard Options – enable or disable the tabs displayed in the switchboard view. All tabs are displayed by default. At least one tab must be enabled. Enable or disabled the Dialpad display from this option.

Favorites Selections – add or remove items displayed in the Favorites tab. No items are displayed by default.

4.12 Dialing Calls

Call Assistant can perform various dialing functions:

- · <u>Place a New Call</u> – To place a new call, click the Dial button and enter digits into the Dial Pad. Dialing rules must be followed (e.g. entry of PIN Codes).

- · <u>Dial an Extension</u> – To dial an extension, double-click on it in the Directory or Favorites tab or select it and click the Dial button.

- · <u>Dial a Previous Caller</u> – To dial the number of someone that you previously called or who called you, double-click on the entry in the Call History tab or select the entry and click the Dial button.

- · <u>Place a New Call on a Specific Outside Line</u> – If your handset is configured on the server for one or more Line Appearances, a new call can be placed using a specific outside line by clicking on an outside line button in the Outside Lines view.

- · <u>Dial Digits in an Existing Call</u> – To dial digits in a call that is in progress, right-click on the call and then select Dial Additional from the menu. This option can be used for navigating within an Auto Attendant or within the Message Center

- · <u>Copy & Paste digits in Dial Pad</u> – The Dial Pad supports the copy & paste of valid phone digits (0-9, #, *) from the clipboard. Invalid characters are removed. The valid digits are sent to the phone, one after another as though they were being typed into the Dial Pad. A right mouse click on the Dial Pad offers the option to paste "as-is" or append the number to seize an outside line to the beginning of the dialing number (Nine (9)[†], in the default internal dial plan).

[†] Digit for accessing an outside line may vary per system.