

Splicecom maximiser

Free your Network

The PCS Operators Console User Manual

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www.splicecom.com

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Introduction

SpliceCom’s range of Proactive Communication Stations (PCS) delivers the ultimate in service to the desktop for those seeking the real business benefits that can be gained from the convergence of voice, video and web enabled IT applications. When used in conjunction with the **maximiser**, PCS allows the relevant information from your core business applications to be “pushed” to the desktops of those who need it in a timely and controlled manner, totally independent of the type of telephone you may wish to deploy.

The PCS 410 is an IP hard phone, providing all the facilities associated with a top of the range digital phone for making and receiving calls. It then extends the control and information associated with these calls through an integrated, full-size VGA (Video Graphics Array), LCD touch screen. Where business phones have traditionally provided context sensitive keys around a small display to aid use, the PCS 410 provides a far larger, context sensitive screen. Graphical icons are used to control telephony functions in the same intuitive manner you associate with mobile phones.



The PCS 50 application delivers ALL of the benefits associated with the PCS 410 desktop station to those who wish to use traditional telephones or IP soft phones. Supplied as standard with every **maximiser** system, PCS 50 can be run on any PC or laptop computer running Microsoft Windows, Apple Mac OS X or Linux operating systems.



The PCS 50 application can run as an IP soft phone, where the PC becomes the telephone. The PC must have multi-media capabilities with a headset and microphone connected.

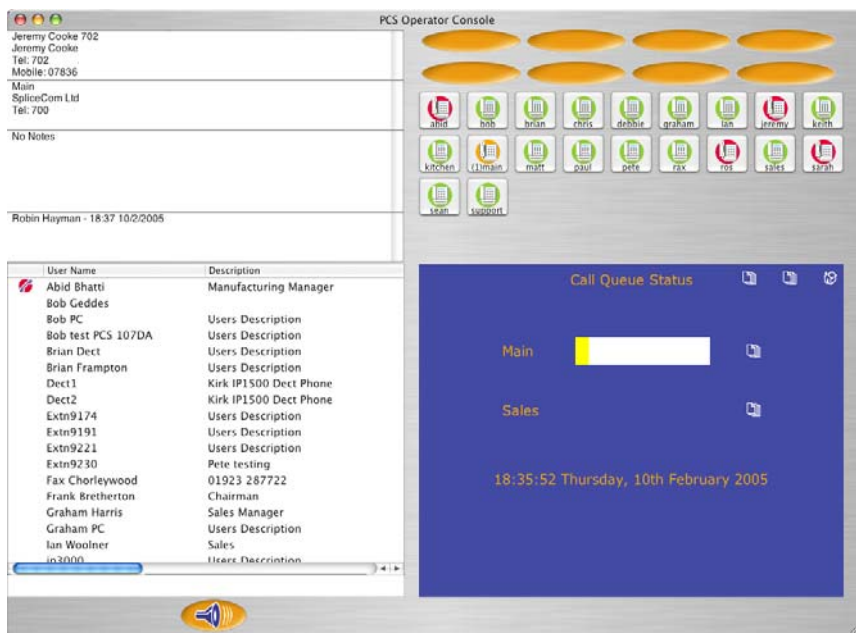
Alternatively, the PCS 50 application can be configured to partner SpliceCom’s PCS 100, PCS 10, PCS 5 or an existing analogue handset where the voice path is connected via the handset but the application assists the user to handle calls quickly and efficiently.



PCS 50 is also the key component in SpliceCom’s unique Extension Anywhere feature set for remote, mobile and home based employees. IP Extension Anywhere sees it used as an IP Softphone (as an alternative to PCS 410 or PCS 100), Analogue Extension Anywhere utilises PCS 50 as a “partner” to an existing home phone, whilst GSM/Mobile Extension Anywhere uses the same arrangement to allow a standard mobile phone to become an fully integrated “**maximiser**” extension - wherever a wireless (or standard) VPN service is available.



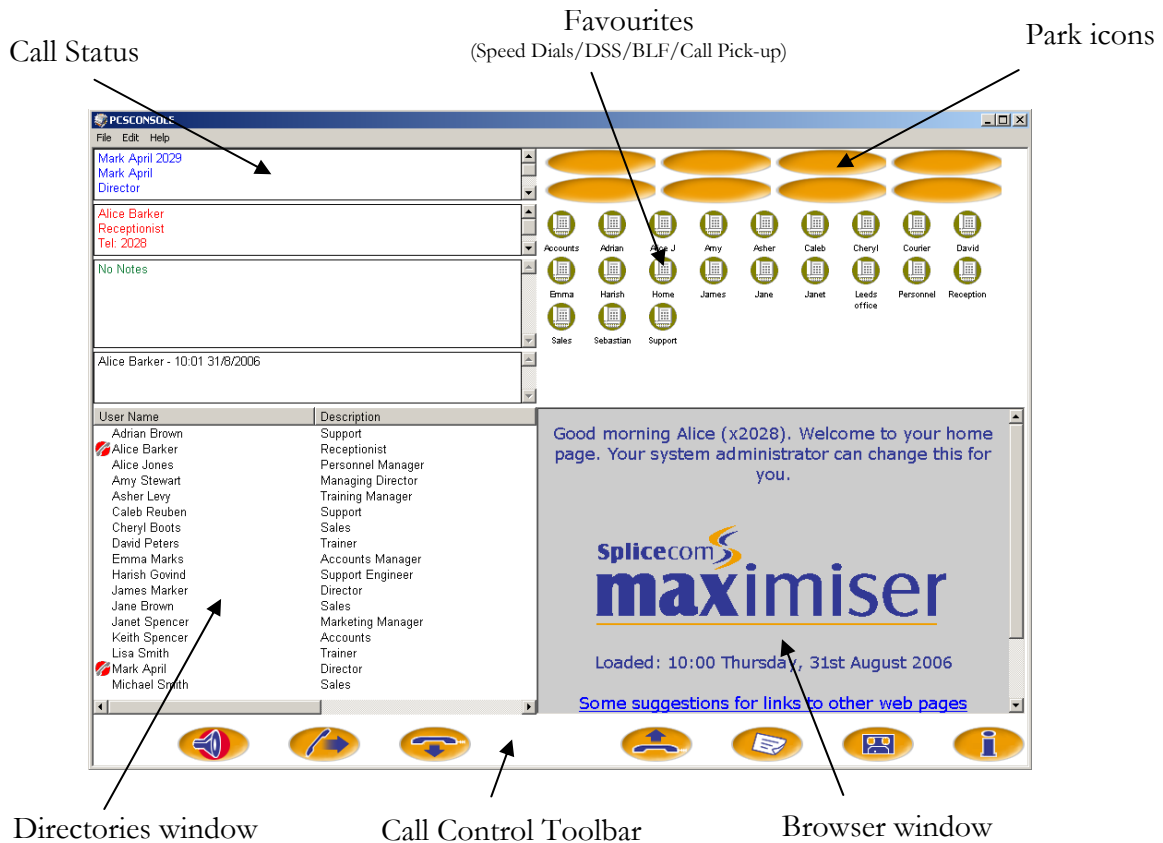
The PCS Operators Console takes the PCS 410/PCS 50 features and presentation style and delivers all of the main call handling components within a unified, single page application. Its design makes it instantly intuitive to use for those familiar with PCS 410 and PCS 50. The PCS Operators Console can be utilised as an IP Softphone, or a Phone Partner application for use in conjunction with PCS 410, PCS 100, PCS 10, PCS 5 or any existing analogue phone. The application runs on Microsoft Windows or Apple Mac OS X operating systems.



The PCS Operators Console – Overview

By bringing different aspects of the PCS application together within a single window and expanding its capability, SpliceCom have specifically developed the PCS Operators Console to partner PCS 410/400, PCS 100, PCS 10, PCS 5 or existing analogue phones. The PCS Operators Console runs under the Microsoft Windows or Apple Mac OS X operating system and can be alternatively used with a USB/Bluetooth (where supported), handset/headset as an IP Softphone.

As can be seen from the image below, the PCS Operators Console can be divided into six sections.



Call Status: This area acts in exactly the same manner as the comparative window on the PCS 410/400/PCS 50. The incoming (or outgoing) caller’s details are displayed - name, telephone number, alternative numbers, etc. - along with details of the Called Number (User/Department name, DDI, etc.). Any notes that have previously been entered against this call or number, if recognized by the system, can also be viewed, along with the time that call has spent “in the system” and the route it has taken around the company on this particular call. i.e. who has already spoken to the caller.

Favourites: These Speed Dial icons act as Busy Lamp Field, Direct Station Select, Call Pick-Up and Queue Status Indicators. Clicking on a Speed Dial icon in a green state – signifying that a User or Department is available to take a call - causes a call to be automatically generated to that number. The ringing status for Users and Departments is signified by the icon flashing red &

orange alternatively. A “steady” red state signifies that the associated User is engaged on a call. When an incoming call is presented to a Department, a number in brackets alongside the relevant Speed Dial signifies how many calls are currently queuing for that Department. By clicking on a ringing Speed Dial the call is automatically presented to the Operator’s phone. Should another call be presented - again signified by a flashing Speed Dial - clicking on the second call will cause the first caller to be automatically parked against the first available Park Slot. Subsequently clicking on the Parked call will then allow toggling between the active and Parked calls.

Park Icons: Eight visible Park slots are provided - twice the number that are available on a standard PCS 410/400/PCS 50. When calls are parked in these slots the caller’s name (if known) or number will be visible, allowing other PCS 410/400, PCS 100, PCS 50 or PCS Operators Console users with visibility of the same Park slots to clearly see who has been parked where.

Directories window: This window can be dynamically changed to view/select/dial details within one of the three centralised **maximiser** directories. This gives access to alternative phone numbers, whilst the User directory also shows Do Not Disturb and engaged status.

Browser window: This is another dynamically changing window which can be used to view any web, intranet or web-enabled application, page or resource. In addition PHP scripting can be utilised to provide bespoke pages which allow any aspect of **maximiser**’s operation to be viewed or changed, i.e. monitoring queue or overall system activity, placing users in or out of a Group or Department, keeping an eye on voicemail messages, etc. As well as the default page, which will be shown when no calls are presented/have been answered, different pages or applications can be linked to a specific CLI, or the number called allowing great flexibility.

Call Control Toolbar: The appearance of the icons on this toolbar is context sensitive and will change depending on the status of a call. Hold, dial ahead, transfer, conference, call recording, etc. is all controlled from these icons which can be actioned via the keyboard or a mouse-click - depending on operator preference.

In line with SpliceCom’s commitment to enable telephony and associated applications to be deployed totally independent of underlying infrastructure, computer operating systems, handset type and geography, the PCS Operators Console allows the operator choice of IP softphone/hardphone or analogue handsets - with or without headsets - and can be run on a Windows or Mac OS X platform. **maximiser**’s architecture allows the Operator function to be centralised, or, where the requirement is for multiple sites/Operators, a single operator can be dedicated to a site, or can handle calls on behalf of multiple sites.

Deployment

The PCS Operators Console can be deployed in two ways. As an IP Softphone the application is completely self-contained, with call control being achieved directly through the on-screen, context-sensitive icons and/or keyboard shortcuts, whilst a Bluetooth (where supported) or USB headset connected directly to the Windows or Apple Mac PC provides the operator’s microphone and ear piece. When used in Phone Partner mode the audio path is provided through the handset of the PCS 410/400, PCS 100, PCS 10, PCS 5 or existing analogue phone. Where headset operation is required, this must be connected to the associated phone. Call

control can be actioned either through the desktop phone or via the PCS Operators Console application/PC keyboard as suits the operator.

For more details on specific handset features and how to use them when using the PCS Operators Console as a Phone Partner please read the following SpliceCom documents;

PCS 410/400 & PCS 50 User Manual
PCS 100 User Manual
PCS 10 User Manual
PCS 5 User Manual

PCS 410/400 Quick Reference Guide
PCS 100 Quick Reference Guide
PCS 10 Quick Reference Guide
PCS 5 Quick Reference Guide

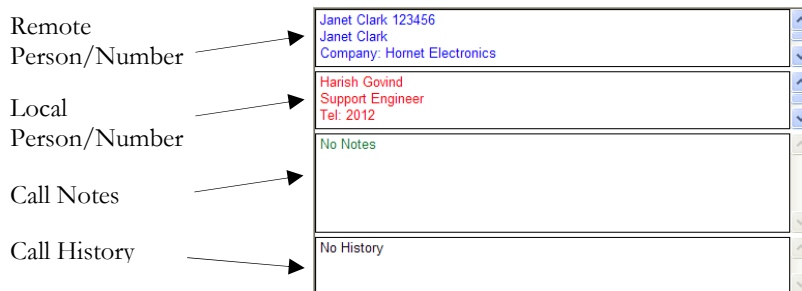
For information on how to configure the PCS Operators Console as either an IP Softphone or Phone Partner please refer to the SpliceCom **maximiser** Installation & Reference Manual.

Basic Call Handling

This section covers basic operation of the PCS Operators Console relating to the receiving, transferring and making of telephone calls. All actions in a “**bold**” typeface indicate key entries on a Windows/Mac OS X PC keyboard.

Call Status

Whilst a call is in progress the Call Status window in the top left hand corner of the PCS Operators Console displays details relating to the call.



If you are receiving a call the Remote Person/Number section displays the caller’s information and the Local Person/Number section displays the recipient’s information, this may be your details, a colleague’s details when their calls are forwarded to your extension, or Department details (please refer to page 25 for further details on working within Departments).

If you are making a call the Remote Person/Number section displays the details of number you are calling and the Local Person/Number section displays your details, as shown in the following example:



You can use the scroll bars to scroll through the information available.

Call History

The Call History pane within Call Status will display a list of the internal users that have handled the call. So that when a call is transferred among several users each user will be able to clearly identify who has previously dealt with the caller.



Call Notes

The Call Notes pane within the Call Status window displays any text or notes that are available for this call. This text can either be added at the time of the call via the Add Note icon or if the Remote Person/Number is known by the system this area will display notes previously added to this Contact, together with the name of the originator of the note and the date and time it was added. For further information please refer to page 16.



Answering a Call

On receiving an incoming call the Call Status window in the top left hand corner of the PCS Operators Console will display the incoming number and caller's name (if known by the system) together with the recipient's information, this may be your details, a colleague's details when their calls are forwarded to your extension, or Department details (please refer to page 25 for further details on working within Departments).



To answer the call lift your handset or select the Answer icon or press **Enter**

You will be informed of an incoming call via the following:

Phone Partner Mode: Your phone will ring and the PCS Operators Console will also ring.

IP Softphone Mode: Your PCS Operators Console will ring.

In both modes the caller's details will also be displayed as Floating Text on your PC screen similar to the following example. This is useful if your PCS Operators Console is minimised, you will be able to see immediately who is calling you.

**Amy Stewart on 2010
for Alice Barker**

This feature can be disabled if required, please refer to page 38 for further details.

Receiving a Follow Me/Forwarded Call

If a colleague's calls have been forwarded to your extension when you receive a forwarded call the colleague's details will be displayed in the Call Status screen to enable you to identify and answer the call correctly.

Making a Call

Phone Partner Mode only

- 1 Lift the telephone handset, or use the hands-free facility on your handset (if supported)
- 2 The Call Status screen will display your name and any other information about you held on the system, if available.
- 3 Dial the number (internal or external) required via the telephone keypad
- 4 The Call Status screen will now display details related to the number you are ringing and any other information about them held on the system - if available.

Alternatively:



Select the Speaker icon, or press **F1** and follow the method for IP Softphone mode below. However you will need to pick up the telephone handset or use the hands free facility on your telephone (if supported) in order for the call to continue.

IP Softphone mode

- 1 On your PC Keyboard enter the number (internal or external) to be dialled. This number will appear in the text box under the Directories window.
- 2 Press the **Enter** key to dial the number.
- 3 The Call Status screen will display your name and any other information about you held on the system, if available, together with details related to the number you are ringing and any information about them held on the system - if available.

Alternatively:



Select the Speaker icon, or press **F1** and then follow the method above.



If you have started to make a call, but have changed your mind and wish to stop the call either replace your handset, or press the hands-free button (if supported), or select the Reject Call icon, or press the **Esc** key.

Making an Internal Call to a User (another extension)

Enter the extension number required via your PC keyboard
Press **Enter** to dial the number

Alternatively,



Lift the telephone handset, or use the hands-free facility (if supported), or select the Speaker icon, or press **F1**

Dial the extension number required via the telephone keypad.
or
Enter the extension number required via your PC keyboard.
Press **Enter** to dial the number

Alternatively,

A list of the Users on your system is shown as the default entry in the Directories window in the bottom left hand corner of the application. Press **F6** if the User directory is not shown.

Use the Text Search facility to find the User you require (please refer to page 20 for further assistance).

Select the User required



Double click on the entry, or select the Dial icon or press **Enter**.

The Call Status screen will update to display the details of the User you are ringing in addition to your details.

For further information on working with the Users Directory please refer to page 22.

Making an Internal Call to a colleague with an Out of Office message

If a colleague has an Out of Office message set this information will appear in the Notes section of the Call Status screen. This feature will not change the manner in which your call is handled.

Sebastian Falks 2009 Sebastian Falks Sales Manager	▲ ▼
Harish Govind Support Engineer Tel: 2012	▲ ▼
On Holiday until Friday, 24/8	▲ ▼
No History	▲ ▼

Making an Internal Call to a Department

Enter the Department's extension number via your PC keyboard
Press **Enter** to dial the number

Alternatively,



Lift the telephone handset, or use the hands-free facility (if supported), or select the Speaker icon, or press **F1**.

Dial the Department's extension number via the telephone keypad.
or
Enter the Department's extension number via your PC keyboard.
Press **Enter** to dial the number.

Alternatively:

Press **F7** for the Departments directory to be shown in the Directories window in the bottom left hand corner of the application.

Use the Text Search facility to find the Department you require (please refer to page 20 for further assistance).

Select the Department required



Double click on the entry, or select the Dial icon, or press **Enter**.

The Call Status screen will update to display the details of the Department you are ringing in addition to your details.

For further information on working with Departments please refer to page 25.

Making an External Call

Enter the external number required via your PC keyboard
Press **Enter** to dial the number

Alternatively,



Lift the telephone handset, or use hands-free facility (if supported), or select the Speaker icon, or press **F1**.

Dial the external number required via the telephone keypad.
or
Enter the external number required via your PC keyboard.
Press **Enter** to dial the number.

Alternatively:

Press **F5** for the Contacts directory to be shown in the Directories window in the bottom left hand corner of the application.

Use the Text Search facility to find the Contact you require (please refer to page 27 for further assistance).

Select the Contact required



Double click on the entry, or select the Dial icon or press **Enter**.

The Call Status screen will update to display the details of the Contact you are ringing in addition to your details.

For more information regarding the use of the Contacts database please refer to page 27.

Ending a Call

Replace the handset.

Alternatively:

Press the hands free button on your telephone (if supported).

Alternatively:



Select the Reject Call icon.

Alternatively:



Select the Speaker icon.

Alternatively:

Press the **Esc** key.

Placing a Call on Hold



Select the New Call icon.



To retrieve the call once on hold, select the Reject Call icon.

Transferring a Call

Announced Transfer

- 1 Enter the number (internal or external) required via your PC keyboard. This number will appear in the text box under the Directories window. (Please note that if you made the original call via your keyboard, first you will need to remove the number displayed in the text box.)
- 2 Press **Enter** to dial the number
The original call will be placed on hold and the new call will be made. Wait for the call to be answered.
- 3 To transfer the original call press **Enter** again.

Alternatively,



Select the New Call icon to place the call on hold.

(Please note that the Transfer icon could also be used at this stage but the new call must be made via the PC keyboard otherwise a blind transfer will be performed.)

Dial the number (internal or external) required either via your telephone keypad or

PC keyboard and press **Enter**. (Please note that if you made the original call via your keyboard, first you will need to remove the number displayed in the text box.)

Wait for the call to be answered.



To transfer the original call select the Transfer icon or press **Enter** (or select the Speaker icon or replace your handset)

Alternatively:



To return to the original call select the Reject Call icon or press **Esc** (or wait for the other end to hang up).

Alternatively:



To return to the original call and place the second call on hold, select the Switch icon.



Use the Switch icon to toggle between the two calls.



Finally, select the Transfer icon to connect the two calls together (regardless of which call you are currently connected to).

Alternatively:



Select the Reject Call icon or press **Esc** to clear the call you are currently connected to and return to the other call (or wait for the other end to hang up).

If you are the User transferring the call or the intended recipient of the transferred call, before a call is transferred your Call Notes pane in Call Status will display the following message:

“I have [caller’s name if recognised by the system] on hold – [name of User transferring the call] – [time and date]”

For example:



Unannounced transfer (Blind Transfer)

- 1 Enter the number (internal or external) required via your PC keyboard. This number will appear in the text box under the Directories window. (Please note that if you made the original call via your keyboard, first you will need to remove the number displayed in the text box.)
- 2 Press **Enter** to dial the number
The original call will be placed on hold and the new call will be made.
- 3 Once the call has been connected press **Enter** again.
The call will be transferred to this number. You will no longer have control of the call.

Alternatively:



Select the Transfer icon (the call will be put on hold)

Dial the number (internal or external) required

If you dial via your telephone keypad the call will be automatically transferred and you will no longer have control of the call.

Alternatively,

If you enter the number via your PC keyboard this will appear in the text box under the Directories window. (Please note that if you made the original call via your keyboard, first you will need to remove the number displayed in the text box.)

Press **Enter** to dial the number



Once the call has been connected select the Transfer icon or press **Enter**

The call will be transferred to this number. You will no longer have control of the call.

If you are a recipient of an unannounced transfer answer the call in the normal way. Your Call History pane in Call Status will display who transferred the call to you.

Transferring a Call via the Directories

If you do not know the number of the person to whom you wish to transfer the call you can look up the information in one of the **maximiser** System directories. These are displayed in the bottom left hand corner of the application in the Directories window.

To access these directories, on your PC keyboard press

F5 – Contacts

F6 – Users

F7 - Departments

Use the Text Search facility to find the entry you require (please refer to page 20 for further assistance).

Select the name required.



Double click on the entry, or select the Dial icon or press **Enter**

The original call will be placed on hold and the new call will be made.

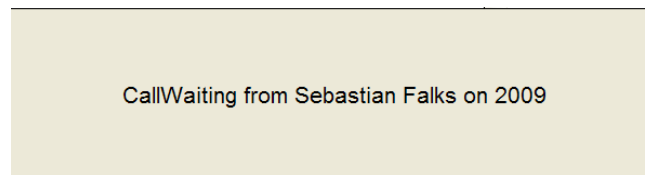


Select the Transfer icon or press **Enter** when ready.

Further information on working with these directories can be found on the following pages: Contacts – page 27, Users – page 22 and Departments - page 25.

Handling a waiting call

If a second call is presented to your extension, if Call Waiting has been set, for example, you will hear an intermittent beep in your earpiece and a message, similar to the following example, will appear on your screen.



The Switch icon will appear at the bottom of the PCS Operators Console.

Firstly, select the Switch icon to view the caller's details. Your first call will be placed on hold.

Either



Select the Answer icon to answer the second call.



Use the Switch icon to switch between the two calls.

or



Select the Reject Call icon or press **Esc**
The call will be passed to your Forward on Busy number (if enabled) or passed directly to voicemail (if enabled) or cancelled.

If you choose to ignore a call waiting on your phone (i.e. you do not press the Switch icon), the caller will be automatically passed to your voicemail (if enabled).

If you press the Switch icon and choose not to answer or choose to reject the call waiting the caller will be automatically passed to your voicemail (if enabled) and you will be returned to your previous call.

Park Icons

The Park icons reside in the top right hand corner of the PCS Operators Console. These allow calls to be put on hold in a system area so that the call can be picked up from any other extension on the system. The PCS Operators Console provides eight Park icons to access Park Slots 1, 2, 3, 4, 5, 6, 7 & 8. If a call is parked via one of these Park icons PCS 410/400, PCS 100, PCS 50 & PCS Operators Console users will have visual indication of the parked call and can then retrieve it if required. PCS 10, PCS 5 and analogue phone users can also retrieve parked calls and receive audible notification when parking a call.



Parking a Call



Click on one of the eight Park icons.



The caller's name (or phone number if not recognised by the system) will be displayed on the Park icon.

Pick up a Parked Call



Press the relevant Park icon.

Please note:

- If you pick up a parked call while in the progress of another call, the first call will be automatically parked in the next available slot.
- To pick up a parked call directly via PCS 5 or an analogue handset please refer to your System Administrator for the relevant short code.
- If you are unable to pick up a call parked by a colleague you may be operating within a different “Company” to your colleague. Please refer to your System Administrator for further details.
- If you belong to a “Company” this Company may be configured with a Park Timeout. This means that when you park a call it will be represented to you after the time configured. By default, this is set to 5 minutes. A represented call can be answered in the normal way. Please refer to your System Administrator for further details.
- PCS 410/400, PCS 100, PCS 50 and PCS 10 all support four Park icons. By default these are configured to access Park Slots 1, 2, 3 and 4. However if you wish the icons to access alternative Park Slots in order to create either group or “private” park slots please refer to your System Administrator for further assistance.

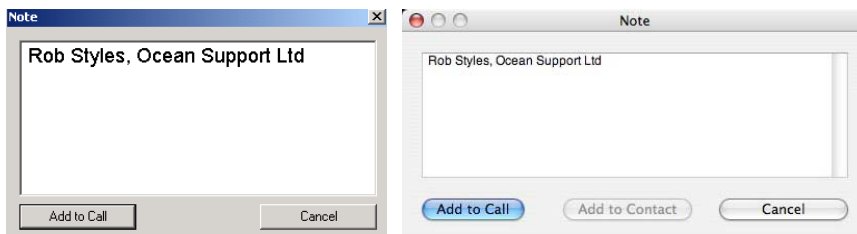
Adding a Note to a Call

During a call you may wish to make notes about the call, for example, the caller’s name, the details of his enquiry etc. This information not only acts as an aide memoir for you but will also be passed to another User of a PCS 410/400/50/Operators Console when the call is transferred.



Click on the Add Note icon.

Enter any text required in the Note box.



Click on Add to Call.

The text together with the name of the originator of the note and the date and time will appear in the Call Notes pane of Call Status.

Rob Styles, Ocean Support Ltd - KatieB - 7/9/2004 14:22

This information will be passed on with the call if transferred.

Creating a Conference call

The conferencing facility allows you to create a 3-way conversation between yourself and two internal or external calls. (Please note that this feature must be enabled on your telephone system. Please refer to your System Administrator if this feature is not available.)

Firstly, make a call to one of the numbers required.



Select the New Call icon to place this call on hold and make a second call.

Once you have the two calls active on your extension the following icons will assist you to create and handle a conference call.



Use the switch icon to toggle between the two calls.



Select the Conference icon to create a 3-way conference with the two calls that you have active on your phone.



The In Conference icon indicates that you are currently on a conference call and can be used to cancel the conference and return to 2-way conversations with your calls.



You can end a conference at any time by replacing your handset or by selecting the Speaker icon

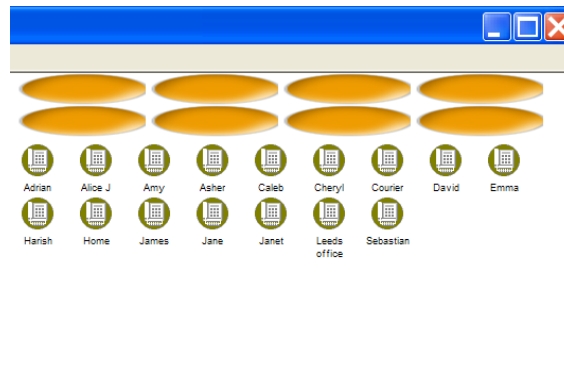


If you select the Reject Call icon or press **Esc** while on a conference call you will hang up the call displayed in Call Status and return to a 2-way conversation with the other call.

Working with Favourites

The Favourites area of the PCS Operators Console is located mid-way down the right-hand side and displays your Speed Dials providing your own personal list of regularly used internal or external telephone numbers. Your Speed Dials can be set up via your PCS 410/400 or PCS 50 if applicable, alternatively please refer to your System Administrator for assistance.

Speed Dials set up for internal extensions will also act as Busy Lamp Fields (BLF), in other words they will indicate when that User is on the phone. In addition Speed Dials for internal Users or Departments can be used to pick-up calls for those extensions, and shows the number of calls queuing against that number.



Making a call with a Speed Dial



Press the appropriate Speed Dial icon and a call will be automatically generated.



If an internal Speed Dial is displayed with a red background this means the User is currently busy.



If an internal Speed Dial is “flashing” with a yellow/red background this means the User’s or Department’s extension is currently ringing.

Transferring a call via a Speed Dial

Your Speed Dials allow you to transfer a call quickly and easily.



Select the Speed Dial required.

The original call will be placed on hold and the new call will be made.



Press the Transfer icon to complete the transfer.

For further information on transferring calls please refer to page 12.

Picking up an incoming call via a Speed Dial

You can pick up a call ringing on another extension via a Speed Dial. This is useful if, for example, you are answering calls for multiple Departments or for answering a colleague's phone when they are not at their desk.



Each Speed Dial that is ringing will “flash” orange and red.

Click on the relevant icon to pick up the call.

Picking up a call for a Department via a Speed Dial

A Speed Dial can be set up for a Department where it will show incoming calls, whilst the number of calls waiting to be answered will be shown in brackets. You do not have to be a member of the Department to pick up a Department call.



Each Speed Dial for a Department that is ringing will “flash” orange and red.



The total number of calls queuing for that Department will be shown in brackets.

Click on the relevant icon to pick up the call.

For further information on Departments please refer to page 25.

Please note:

- If you are currently on a call when you pick up a ringing call your original call will be parked in the first available park slot. Please refer to page 15 for further information on parking a call.
- If you are a member of a “Company” (a feature of the telephone system) you will only be able to pick up calls from extensions that are members of the same company and that have been previously created in your Speed Dials list. Please refer to your System Administrator for further information.

Working with the System Directories

Provided with the **maximiser** system is the ability to set up a database of contact information that can be accessed by users of a PCS 410/400, PCS 100 & PCS 50 in addition to the PCS Operators Console. Your System Administrator is responsible for the maintenance of this database and will be able to assist you with your queries. The next section of this User Guide will explain how the PCS Operators Console uses this database to provide directories of telephone numbers to help you make calls quickly and easily.

Searching the Database

There are three directories that can be accessed by pressing the following function keys on your PC keyboard:

F5 – Contacts – this gives a list of external contacts allowing you to find the number for a supplier or customer, for example. For further information on using this directory please refer to page 27.

F6 – Users – this gives a list of the users of your system so that you can call or transfer calls to your colleagues' extension, mobile or home telephone numbers. For further information on using this directory please refer to page 22.

F7 – Departments – this gives a list of the Departments that are available on your system so that you can call or transfer calls to a group of colleagues responsible for a specific area in your business eg Support, Reception, Sales etc. For further information on working with Departments please refer to page 25.

Each of the above directories can be searched using the following methods:

Text Search

Begin typing the name that you require on your PC keyboard and this will appear within the text box directly underneath the Directories window in the bottom left hand corner of the PCS Operators Console. As you type your search will be reduced until the name you require appears highlighted at the top of the list.

Alternatively, if you know the number of the User, Department or Contact that you require you can enter this number and the entry will appear highlighted at the top of the list once a match has been made.

Horizontal Scroll Bar

By default, the Name and Description column appear in the Directories window. However, further information on each User, Department or Contact can be viewed by moving the horizontal scroll bar to the right.

Resize the Columns

Each column displayed in the Directories window can be resized by pointing the mouse at the line to the right of the column title. A double headed arrow shape will appear. Hold down the mouse and move the column to the left or right.




Displaying a Web Page



Each Contact/User/Department of the telephone system - including you - can be configured so that a specific web page is automatically displayed in the Browser Window, located in the bottom right hand corner of the PCS Operators Console, when you make a call and/or receive a call. This could be a web page accessed via the Internet, stored on your company's Intranet or the telephone system's internal web server. This can provide, for example, a script for handling calls made to a specific Department, sales information when talking to customers or access to company information when in a conversation with a specific member of staff. Please refer to your System Administrator for further information.

Working with the Users Directory

The Users Directory allows you to transfer and re-direct calls to colleagues quickly and easily without having to remember their extension numbers.

You can also use this directory to view information stored on the system database, for example, a colleague’s mobile or home number. These numbers can be used to make a call or transfer a call to a colleague’s home or mobile.

User Name	Description
Adrian Brown	Support
Alice Barker	Receptionist
Alice Jones	Personnel Manager
 Amy Stewart	Managing Director
Asher Levy	Training Manager
Caleb Reuben	Support
Cheryl Boots	Sales
David Peters	Trainer
Emma Marks	Accounts Manager
 Harish Govind	Support Engineer
 James Marker	Director
Jane Brown	Sales
Janet Spencer	Marketing Manager
Keith Spencer	Accounts
Lisa Smith	Trainer
Michael Smith	Sales
Peter Upton	Sales Support Manager

The User Directory will also display if an extension is busy (red icon ) or has Do Not Disturb set (blue icon )

Making a Call via the Users Directory

A list of the Users on your system is shown as the default entry in the Directories window in the bottom left hand corner of the PCS Operators Console. Press **F6** if the User directory is not shown.

Use the Text Search facility to find the User you require.

Select the User required.



Double click on the entry or select the Dial icon or press **Enter**.

The Call Status screen will update to display the details of the User you are ringing in addition to your details.

Transferring a Call via the User Directory

A list of the Users on your system is shown as the default entry in the Directories window in the bottom left hand corner of the application. Press **F6** if the User directory is not shown.

Use the Text Search facility to find the User you require.

Select the User required.



Double click on the entry or select the Dial icon or press **Enter**.

The original call will be placed on hold and a new call will be made.

The Call Status screen will update to display the details of the User you are ringing in addition to your details.



Select the Transfer icon or press **Enter** when ready to transfer the call.

For further information on transferring calls please refer to page 12.

Viewing User Details

When a User has been selected within the Users Directory the Information icon will appear allowing you to view the details stored for that User on the telephone system.

A list of the Users on your system is shown as the default entry in the Directories window in the bottom left hand corner of the application. Press **F6** if the User directory is not shown.

Use the Text Search facility to find the User you require.

Select the User required.



Select the Information icon.

When ready, select Close to exit from the dialogue box.

Please note that you will only be able to amend your own details. Select OK to save any changes.

Making a call to a User's mobile or home number

A list of the Users on your system is shown as the default entry in the Directories window in the bottom left hand corner of the application. Press **F6** if the User directory is not shown.

Use the Text Search facility to find the User you require.

Select the User required.



Select the Further Numbers icon.



If you wish to dial the Mobile number select the Mobile button, if you wish to dial the Home number select the Home button etc.

Transferring a call to a User's mobile or home number

A list of the Users on your system is shown as the default entry in the Directories window in the bottom left hand corner of the application. Press **F6** if the User directory is not shown.

Use the Text Search facility to find the User you require.

Select the User required.



Select the Further Numbers icon.



If you wish to dial the Mobile number select the Mobile button, if you wish to dial the Home number select the Home button etc.

The original call will be placed on hold and the new call will be made.



Select the Transfer icon or press **Enter** when ready.

For further information on transferring calls please refer to page 12.

Working as a member of a Department

Due to your role as an Operator within your company you will probably be handling calls on behalf of one or more Groups on the **maximiser** business telephone system. For example, you may be the first point of contact for calls to Sales or Support in addition to answering calls to the main business number. Call handling Groups can be created on your system to ensure the efficient handling of incoming calls. For example, all incoming calls to the main number could be shared amongst several colleagues to ensure the calls are answered quickly, or support calls could be shared equally among the Support team.

A Department determines the routing of a call to a Group and your System Administrator will inform you if you will be receiving Department calls and how that Department is configured. The following describes the usage of your PCS Operators Console when handling Departmental/Group calls on your **maximiser** system.

Receiving a Department Call

Instead of your details being displayed, Call Status will display the Department name together with any other relevant information such as the extension number. This allows you to determine, before answering the call, whether you are receiving a personal or Department call and allows you to answer the call accordingly.

Making an Call to a Department

Enter the Department's extension number via your PC keyboard

Press **Enter** to dial the number

Alternatively,



Lift the telephone handset, or use the hands-free facility (if supported), or select the Speaker icon, or press **F1**.

Dial the Department's extension number via the telephone keypad.

or

Enter the Department's extension number via your PC keyboard.

Press **Enter** to dial the number

Alternatively:

Press **F7** for the Departments directory to be shown in the Directories window in the bottom left hand corner of the application.

Use the Text Search facility to find the Department you require (please refer to page 20 for further assistance).

Select the Department required



Double click on the entry, or select the Dial icon, or press **Enter**.

Transferring a Call via the Department Directory

Press **F7** to view the Departments directory in the Directories window in the bottom left hand corner of PCS Operators Console.

Use the Text Search facility to find the Department you require (please refer to page 20 for further assistance).

Select the Department required



Double click on the entry, or select the Dial icon or press **Enter**.

The original call will be placed on hold and a new call will be made.

The Call Status screen will update to display the details of the Department you are ringing in addition to your details.



Press the Transfer icon or press **Enter** when ready to transfer the call.

For further information on transferring calls please refer to page 12.

Using a Web Page with a Department

A Department can be configured so that a web page relevant to that Department can be viewed in the bottom right hand window of the PCS Operators Console when you make a call to and/or receive a call for a specific Department. The web page can be displayed either by the press of a button when you choose or automatically before or after a Department call is answered. This could be a web page stored on the Internet or on your company's Intranet or the telephone system's internal web server. This is useful if a script must be followed when answering a call or, for example, you wish to access sales information to assist a caller.

Please refer to your System Administrator for further details.

Picking up a Department call

You can pick up a call ringing for a Department via a Speed Dial. This is useful if, for example, all the members of a particular Department are busy and you wish to assist with answering the call. You do not have to be a member of the Department to pick up a Department call.

When a Speed Dial is used for a Department it will "flash" orange & red when an incoming call is received and the number of calls waiting to be answered will be displayed.



Each Department entry that is ringing will "flash" orange and red.



The total number of calls queuing for that department will be shown in brackets.

Click on the relevant icon to pick up the call.

For further information on using Speed Dials please refer to page 18.

Working with Contacts

The Contacts directory on the PCS Operators Console will display the list of external contacts, for example, customers, suppliers etc, entered on the database on your telephone system. This information can be used to make calls quickly and easily and helps to identify incoming calls.

Making a Call via the Contacts Directory

Press **F5** to display the Contacts directory in the bottom left hand window of the PCS Operators Console.

Use the Text Search facility to find the Contact you require (please refer to page 20 for further assistance).

Select the Contact required



Double-click on the entry or select the Dial icon or press **Enter**.

The Call Status screen will be updated to display the Contact you are ringing and your name.

Receiving a call from a Contact

The Call Status window of the PCS Operators Console will display the name and number of the person calling in the top pane. Handle the call in the normal way.

Transferring a Call to a Contact

Press **F5** to display the Contacts directory in the bottom left hand window of the PCS Operators Console.

Use the Text Search facility to find the Contact you require (please refer to page 20 for further assistance).

Select the Contact required.



Double-click on the entry or select the Dial icon or press **Enter**.

The original call will be placed on hold and the new call will be made.

The Call Status screen will be updated to display the Contact you are ringing and your name.



Press the Transfer icon or press **Enter** when ready.

For further information on transferring calls please refer to page 12.

Adding a Note to a Contact

During a call text can be entered and displayed with the call. This can be useful when a call is transferred as the information is passed on (please refer to page 7 for further information). If the call has been made to or received from a Contact this text can also be stored permanently with the Contact's record for future information. This text will be displayed whenever a call is received by this Contact.



Click on the Add Note icon.

Enter any text required in the Note box.

Click on "Add to Contact."

The text plus the date and name of the originator of the note will appear in the Call Status screen and will be passed on with the call if transferred.

This information will also be stored permanently with the Contact and next time a call is received by or made to this Contact the text will appear in Call Status.

Viewing Contact Details

All the information, for example address, telephone numbers etc, stored for a particular Contact within the telephone system's centralised database can be viewed.

Press **F5**.

Select the Contact required.



Select the Information icon.

The information stored for the select Contact will be displayed.

Select OK or Cancel to exit.

Making a Call to a Contact's alternative telephone numbers

Press **F5**. A list of Contacts stored on your system's database will be displayed.

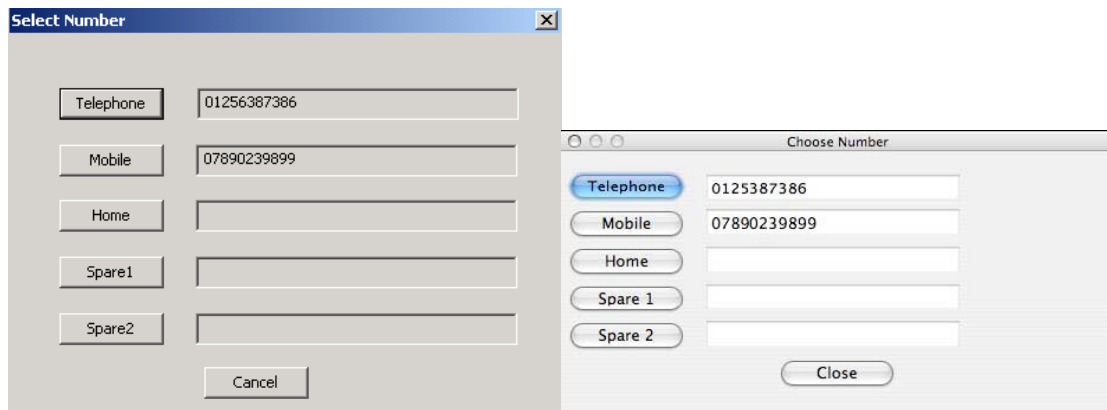
Select the Contact required.



Select the Further Numbers icon.



If you wish to dial the Mobile number click on the Mobile button, if you wish to dial the Home number click on the Home button etc.



Transferring a call to a Contact's mobile or home number

Press **F5**. A list of Contacts stored on your system's database will be displayed.

Select the Contact required.



Select the Further Numbers icon.



If you wish to dial the Mobile number click on the Mobile button, if you wish to dial the Home number click on the Home button etc.

The original call will be placed on hold and the new call will be made.



Select the Transfer icon or press **Enter** when ready.

For further information on transferring calls please refer to page 12.

Amending the details within a Contact

Please note: you will only be able to make a change to a Contact's details if given the required permission. Please refer to your system administrator for further information.

Press **F5**.

Select the Contact required.



Select the Information icon.

You can amend or add information, and view and add Notes stored with this Contact, and delete the Contact if required.

Select OK to save any changes or to exit without saving select Cancel or Close.

Create a new Contact

Please note: you will only be able to add a new Contact to the database if given the required permission. Please refer to your system administrator for further information.

Press **F8** to display a blank Contact Details form.

Enter all the information required.

If you wish to add any notes to this Contact select the “Notes” button and enter the text required.

When ready, select OK to save the new Contact or Cancel/Close to cancel the new entry.

Please note that this will save a new Contact in the centralised database and will, therefore, be available to your colleagues using a PCS 410/400, PCS 50 or PCS Operators Console.

Create a new Contact during a Call

You can also create a new Contact during a call. The caller’s incoming number will be automatically entered in the Telephone number field and the further information can be added while you are on the call.

Please note: you will only be able to add a new Contact if given the required permission. Please refer to your system administrator for further information.

Press **F8** to display a blank Contact Details form.

Enter all the information required.

Select OK to save the new Contact or Cancel/Close to cancel the new entry.

If you end the call before completing the new entry the Contact Details form will stay open until you select OK/Save.

Using a Web Page with a Contact

A Contact can be configured so that a web page relevant to that Contact is available when a call is received from or made to this Contact. The web page can be viewed either by the press of a button when you choose, or automatically, before a call to or from this Contact is answered, or

after a call to or from this Contact is answered. This could be a web page stored on the Internet, on your company's Intranet, or within the telephone system's internal web server. This could be useful if you wish to view your supplier's web site when on a call, or you wish to view a customer's account information stored on your company's intranet, for example.

Configuring a Contact to display a web page

Please note: you will only be able to make a change to a Contact's details if given the required permission. Please refer to your system administrator for further information.

Open the Contact Details as described on page 28.

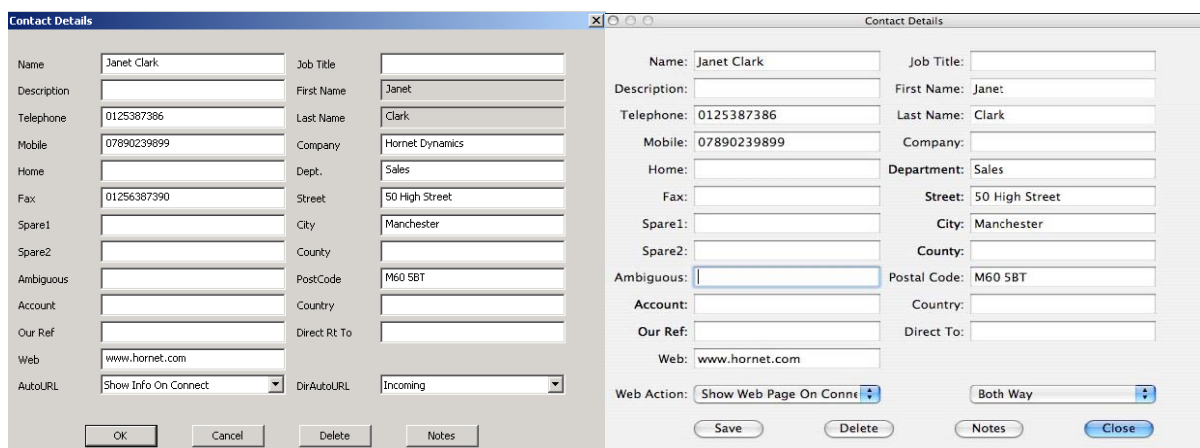
From the Auto URL list select either:

- a. No Action – the web page can be displayed by pressing the Information icon.
- b. Show Info on Ring – the web page will be displayed when a call is made to and/or received by this Contact.
- c. Show Info On Connect – the web page will be displayed once a call to and/or from this Contact has been answered.

From DirAutoURL list box select either:

- a. Bothway – the web page will be displayed when a call is made to this Contact and when a call is received from this Contact.
- b. Incoming – the web page will only be displayed when a call is received from this Contact.
- c. Outgoing – the web page will only be displayed when a call is made to this Contact.

Select "OK/Save" to save the changes.



The image shows two side-by-side screenshots of the 'Contact Details' form. The left screenshot shows the 'AutoURL' dropdown menu set to 'Show Info On Connect' and the 'DirAutoURL' dropdown menu set to 'Incoming'. The right screenshot shows the 'Web Action' dropdown menu set to 'Show Web Page On Connect' and the 'Both Way' dropdown menu set to 'Both Way'. Both screenshots show the same contact information for Janet Clark at Hornet Dynamics, including phone numbers, address, and website.

Using an Ambiguous Number

When a company has a large DDI number range a Contact can be created that will match any incoming call so that you and your colleagues are always aware when a call is received from this company.

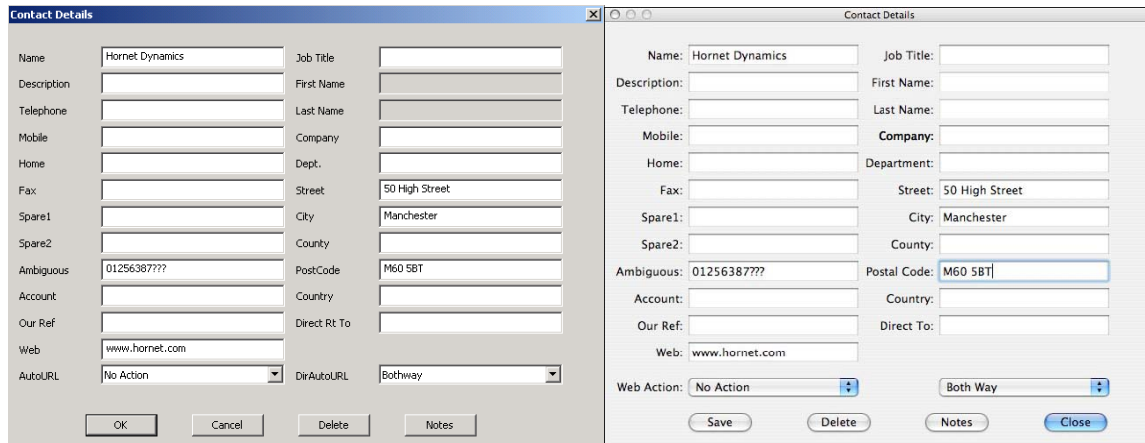
A question mark (?) is used to specify which part of the telephone number will vary, eg an entry of 01256387??? will match a call from 01256387385, 01256387370, 01256387291 etc.

Press **F8** to display a blank Contact Details form.

In the Name field enter the company's name.

In the Ambiguous field enter the company's number using a ? where a digit will be variable.

Select "OK/Save" to save the new Contact.



The image shows two side-by-side screenshots of the 'Contact Details' form. The left screenshot shows a form with the following fields: Name (Hornet Dynamics), Job Title, Description, First Name, Telephone, Last Name, Mobile, Company, Home, Dept., Fax, Street (50 High Street), Spare1, City (Manchester), Spare2, County, Ambiguous (01256387???), PostCode (M60 5BT), Account, Country, Our Ref, Direct Rt To, Web (www.hornet.com), AutoURL (No Action), and DirAutoURL (Bothway). The right screenshot shows the same form with the 'Web Action' dropdown set to 'Both Way' and the 'Save' button highlighted.

Please note:

- Contacts containing a complete match to the incoming number will take priority over an ambiguous number.
- You will only be able to add or amend a Contact if given the required permission. Please refer to your system administrator for further information.

Working with Voicemail

Leaving a message for a colleague

A call will be automatically transferred to your colleague's voicemail if they are busy or do not answer their phone (providing the voicemail facility has been configured and enabled). However you can pre-empt this and divert directly to their voicemail

Make a call to your colleague in the normal way.



Select the Messages icon.

Leave a message when requested.

Leaving a message for a colleague without dialling the number first

Press **F5** if the User directory is not already active in the bottom left hand corner of the PCS Operators Console.

Select the User required.



Select the Messages icon

Leave a message when requested.

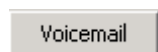
Alternatively,

Press **F5** if the User directory is not already active in the bottom left hand corner of the PCS Operators Console.

Select the User required.



Select the Further Numbers icon.



Click on the Voicemail button.

Leave a message when requested.

Transfer a call to a colleague's Voicemail

Press **F5** if the User directory is not already active in the bottom left hand corner of the PCS Operators Console.

Select the User required.



Select the Messages icon

The caller will be transferred to your colleague's voicemail.

Alternatively,



Place the call on hold by selecting the New Call icon (or the Transfer icon).

Press **F5** if the User directory is not already active in the bottom left hand corner of the PCS Operators Console.

Select the User required.



Select the Messages icon.

The caller will be transferred to your colleague's voicemail.

Alternatively:



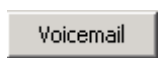
Select the Transfer icon (or the New Call icon).

Select the User required.

Enter the User's extension number via your keyboard or select the User from the Users Directory



Select the Further Numbers icon.



Click on the voicemail button.

The caller will be transferred to the User's voicemail.

Alternatively (Phone Partner mode only),



Place the call on hold by selecting the New Call icon.

Dial the User's extension number.



Select the Messages icon.

Replace your handset, select the Speaker icon or press **Esc**.

Recording a Call

During any call (internal or external or conference calls) you can record the conversation. The resulting recording will become a new voicemail message and can be accessed in the usual way.



During a call press the Record icon.

Your conversation will be recorded.



To end the recording either press the Record icon or end the call.

Please note: The use of this feature is controlled by your System Administrator. If the Record option is not available please refer to your System Administrator for further information.

Voicemail for Departments

Each Department must be configured to use the voicemail service provided by the **maximiser** system. If voicemail has been enabled a call to a Department will automatically pass to voicemail after a time period specified through the Department's configuration on the system. Please refer to your System Administrator for further details.

Leaving a message for a Department

Make a call to the Department in the normal way.



Press the Messages icon.

Leave a message when requested.

Leaving a message for a Department without dialling the number first

Press **F7** if the Departments directory is not already active in the bottom left hand corner of the PCS Operators Console.

Select the Department required.



Select the Messages icon.

The caller will be transferred to the Department's voicemail.

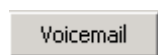
Alternatively,

Press **F7** if the Departments directory is not already active in the bottom left hand corner of the PCS Operators Console.

Select the Department required.



Press the Further Numbers icon.



Press the Voicemail button.

Leave a message when requested.

Transferring a call to a Department's Voicemail

Press **F7** if the Departments directory is not already active in the bottom left hand corner of the PCS Operators Console.

Select the Department required.



Select the Messages icon

The caller will be transferred to the Department's voicemail.

Alternatively,



Place the call on hold by selecting the New Call icon (or the Transfer icon).

Press **F7** if the Departments directory is not already active in the bottom left hand corner of the PCS Operators Console.

Select the Department required.



Select the Messages icon.

The caller will be transferred to the Department's voicemail.

Alternatively:



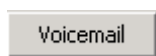
Select the Transfer icon (or the New Call icon).

Press **F7** if the Departments directory is not already active in the bottom left hand corner of the PCS Operators Console.

Select the Department required.



Select the Further Numbers icon.



Click on the voicemail button.

The caller will be transferred to the Department's voicemail.

IP Softphone Features

Muting a Call

(PCS Operators Console in IP Softphone mode only)

For use in circumstances where you wish to prevent the caller from hearing your conversation with another colleague.



Press the Mute icon to mute your call.



Press the Mute icon to turn this feature off.

Changing the Volume

(PCS Operators Console in IP Softphone mode only)

You can change the ringing volume and conversation volume at any time during or before a call.

Changing the Volume before a call



Press the Speaker icon.



Press the Volume Up or Down icons as required.

Changing the Volume during a ringing call

The Call Status screen will update when a call is received



Press the Volume Up or Down icons as required.

The ringing volume will increase or decrease.

Changing the Volume during an answered call

Answer the call in the normal way.



Press the Volume Up or Down icons as required.

The volume of your handset or earpiece will increase or decrease.

System Administration

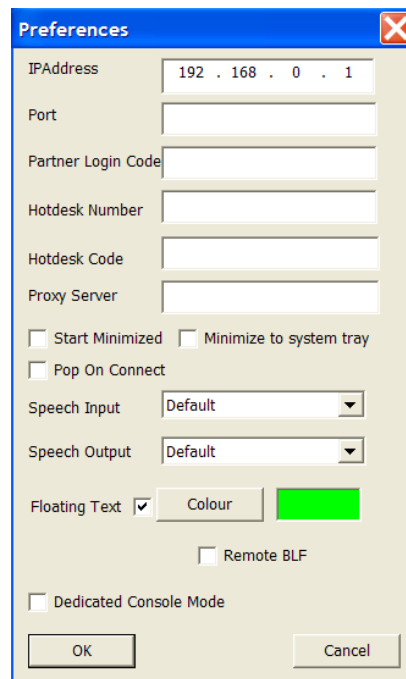
View the PCS OC set up information

- 1 From the Menu bar select Help
- 2 Select About PCSCONSOLE
- 3 The following information will be displayed:
 - Software version
 - IP address of the PC running PCS OC
 - User currently logged in
 - Extension number of the User
 - IP address of the Call Server to which the PCS OC is connected
 - IP address of the Call Server providing the User's voicemail service.
- 4 Select OK when finished.


Setting Preferences for a PCS OC

To access the Preference dialogue box -

- 1 From the Menu bar select File
- 2 Select Preferences



Proxy Server: the IP address of the proxy server to be used by the PCS OC when viewing web pages. Please refer to your system administrator for further information.

Minimize to System Tray: Enables or disables the ability to minimise the PCS OC to the System Tray by selecting the Close icon  at the top right hand corner of the PCS OC window. When a call is received the application will automatically pop up then automatically minimise at the end of a call. To manually pop up the PCS OC window click on the icon in the System Tray. When this feature is enabled use the File menu then Exit to close the application or right click on the icon in the System Tray and select Exit, if required.

Start Minimized: This option, if selected, will automatically minimise the PCS OC to the System Tray when the application is opened. This feature will operate when the application is next started and will also tick the Mimimize to System Tray option, if not already selected, and will operate as described above.

Pop On Connect: this feature is used in conjunction with the Minimize to System Tray feature and when the PCS OC is used in partner mode. If enabled the application will pop up once the call has been answered by the handset.

Floating Text: Enables or disables the floating text that appears on your screen when a call is received. Select the Colour button to change the default colour of this text.

Remote BLF: this option will enable or disable the busy lamp field feature when this PCS OC is used across, for example, a VPN connection. **Please note: do not use this feature when this PCS OC is used on the local LAN.**

Icons in Brief

The following lists the function of each icon when displayed with a particular screen or when performing a particular function.



Speaker (on-hook)



Park Icon – set by default for slots 1-8

Favourites



Speed Dial – if configured for an internal extension this icon also indicates that the User’s extension is free



Unavailable – the User’s extension is busy



Ringing - flashing yellow/red the User or Department’s extension is currently ringing

Off-Hook



Mute off (IP Softphone mode only)



Mute on (IP Softphone mode only)



Handset volume down (IP Softphone mode only)



Handset volume up (IP Softphone mode only)



Speaker On (off-hook)



Reject Call – cancel the call



Information – create a new Contact

Receiving a Call



Answer – to answer an incoming call



Reject Call – the call will pass to your Forward on Busy number (if set) or to voicemail (if enabled)



Messages – to reject an incoming call and pass the caller to voicemail (if enabled)



Ringing volume down (IP Softphone mode only)



Ringing volume up (IP Softphone mode only)



Speaker (on-hook)



Information – create a new Contact with the incoming number

Making a Call



Reject Call – cancel the call



Messages – divert an internal call to your colleague's voicemail



Speaker On (off-hook)



Handset volume down (IP Softphone mode only)



Handset volume up (IP Softphone mode only)



Information – to display the web page or user details configured for this number

Answered Call



Transfer – to transfer a call



Reject Call – to end your current conversation and hang-up



New Call – to place the current call on hold and make a new call



Add Note – enter text to be displayed in the Call Notes pane of Call Status



Record Call – to record your current conversation



Recording in progress – to end the recording of your current conversation



Mute off (IP Softphone mode only)



Mute on (IP Softphone mode only)



Volume of conversation down (IP Softphone mode only)



Volume of conversation up (IP Softphone mode only)



Speaker On (off-hook)



Information – to display the web page or User Details configured for this number

Multiple Calls



Transfer – to complete the transfer of a call



Conference – to create a 3-way conference



In Conference – to cancel the conference and return to 2-way conversations



Switch – toggle between two calls

Directories window



Dial – to dial the number associated with the selected entry



Further Numbers – all numbers associated with the selected Contact or User are displayed and can be dialled by clicking on the relevant button



Information – view User’s or Contact’s details



Speaker (on-hook)



Messages – connect directly to selected User’s/Department’s voicemail

Keyboard Short cuts

On-Hook

Windows	Apple Mac	
F1	Cmd+1	Go off-hook
F5	Cmd+5	Go to Contacts Directory
F6	Cmd+6	Go to Users Directory
F7	Cmd+7	Go to Departments Directory
F8	Cmd+8	Create a new Contact
F10	Cmd+0	Enter an Account Code

Browsing Web Pages

CTRL+C	Cmd+C	Copy to the clipboard
Backspace	Backspace	Back one page

Receiving a Call

Enter	Enter	Answer a call
CTRL+A		Answer a call

Answered Call

F1	Fn+F1	Park a call on Park icon 1
F2	Fn+F2	Park a call on Park icon 2
F3	Fn+F3	Park a call on Park icon 3
F4	Fn+F4	Park a call on Park icon 4
F5	Cmd+5	Go to Contacts Directory
F6	Cmd+6	Go to Users Directory

F7	Cmd+7	Go to Departments Directory
F8	Cmd+8	Create a new Contact using the number from the connected call
F10	Cmd+0	Enter an Account Code
Esc	Esc	Clear current call

Multiple Calls

Enter	Enter	Transfer a call
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Contacts / Users / Departments Directories

Enter	Enter	Dial the selected entry
CTRL+I	Cmd+I	View the selected User's or Contact's details
CTRL+S	Cmd+S	Further Numbers - access all numbers stored for the select User or Contact or access the voicemail button for the selected User or Department
Esc	Esc	Close the open window
F9	Cmd+9	Toggle between displaying Contacts by Company Name or Contact Name

Further Numbers

T	T	Dial the Telephone number
M	M	Dial the Mobile number
H	H	Dial the Home number
1	1	Dial the Spare1 number
2	2	Dial the Spare2 number

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