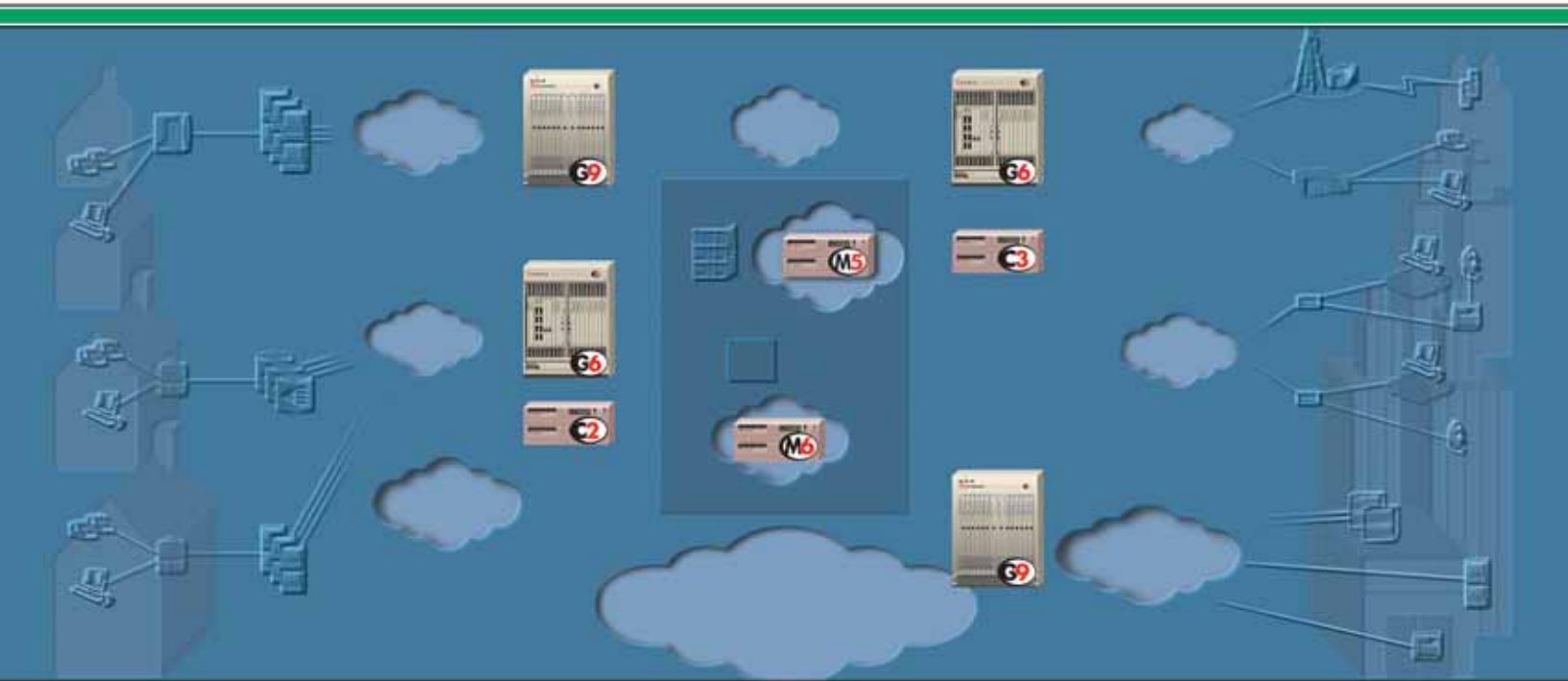


## M6™ Communication Applications Server **Console Assistant User Guide**

Provides information about the Console Assistant which can be used to manage phones on the M6™ Communication Applications Server



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# Introduction to Console Assistant

# 1

The Console Assistant is an application that can be used to manage incoming calls to a main telephone number at a particular site. For example, as the receptionist for your company, you can use Console Assistant to answer and transfer calls to the extensions listed in the Directory. Incoming calls can also be placed on hold or camped on an extension.

## ***In this section:***

- ✓ [“Starting Console Assistant” on page 2](#)
- ✓ [“System Requirements” on page 2](#)
- ✓ [“Removing Console Assistant from your PC” on page 2](#)
- ✓ [“Logging In to Console Assistant” on page 2](#)
- ✓ [“Console Assistant Overview” on page 4](#)
- ✓ [“Main Control Panel” on page 4](#)
- ✓ [“Window Control” on page 6](#)
- ✓ [“Keyboard Shortcuts” on page 6](#)
- ✓ [“Download Manager” on page 7](#)
- ✓ [“Application Log” on page 9](#)

## Starting Console Assistant

Your service provider should provide instructions on how to download and install the Console Assistant. After installation, Console Assistant can be started by selecting **Start > Programs > Console Assistant > Console Assistant**.

### System Requirements

The application will run on any PC with the following configuration:

- Windows XP with Service Pack 2, or Windows 2000
- Pentium 4 processor or better
- 128 MB of RAM minimum, 256 MB of RAM recommended
- Windows .NET Framework 1.1 (may be pre-installed in Windows XP)
- Disk space required:
  - 5 MB for Console Assistant;
  - 20 MB for .NET, if it has to be installed.

Console Assistant is supported using the following IP telephones:

- Cisco 7960 (SCCP)
- Cisco 7960 (SCCP) using one 7914 Expansion Module
- Cisco 7960 (SCCP) using two 7914 Expansion Modules

### Removing Console Assistant from your PC

If you need to remove the Console Assistant application from your PC, you can do one of the following:

- Select **Start > Programs > Console Assistant > Uninstall Console Assistant**. Follow the instructions on the dialogs provided.
- Or, select **Start > Control Panel > Add or Remove Programs**. Select **Console Assistant** from the list, and click **Remove**.


## Logging In to Console Assistant

When you first startup Console Assistant, the login screen will appear. Only one instance of Console Assistant can only be running on a PC.

To login to Console Assistant, from the login screen, do the following:

1. In the *Phone number* field, enter your Console Assistant telephone number (DID only).
2. In the *Phone password* field, enter your password.



3. If desired, check the **Auto-login** box to save your username and password. The next time you start the application, it will automatically log you in.
4. If you have never run the Console Assistant before, you may need to input the server addresses. If the configuration dialog is not currently displayed, click the  button.

- a. In the *Call Agent A*, *Call Agent B*, enter the IP addresses provided by your system provider.
  - b. In the *DB Agent (IP Address)* field, enter the IP address provided by your system provider.
  - c. Check the **Use SSL** checkbox if your service provider instructs you to. This will be required if the provider is using a secure server to provide application updates.
5. Click **Login**.

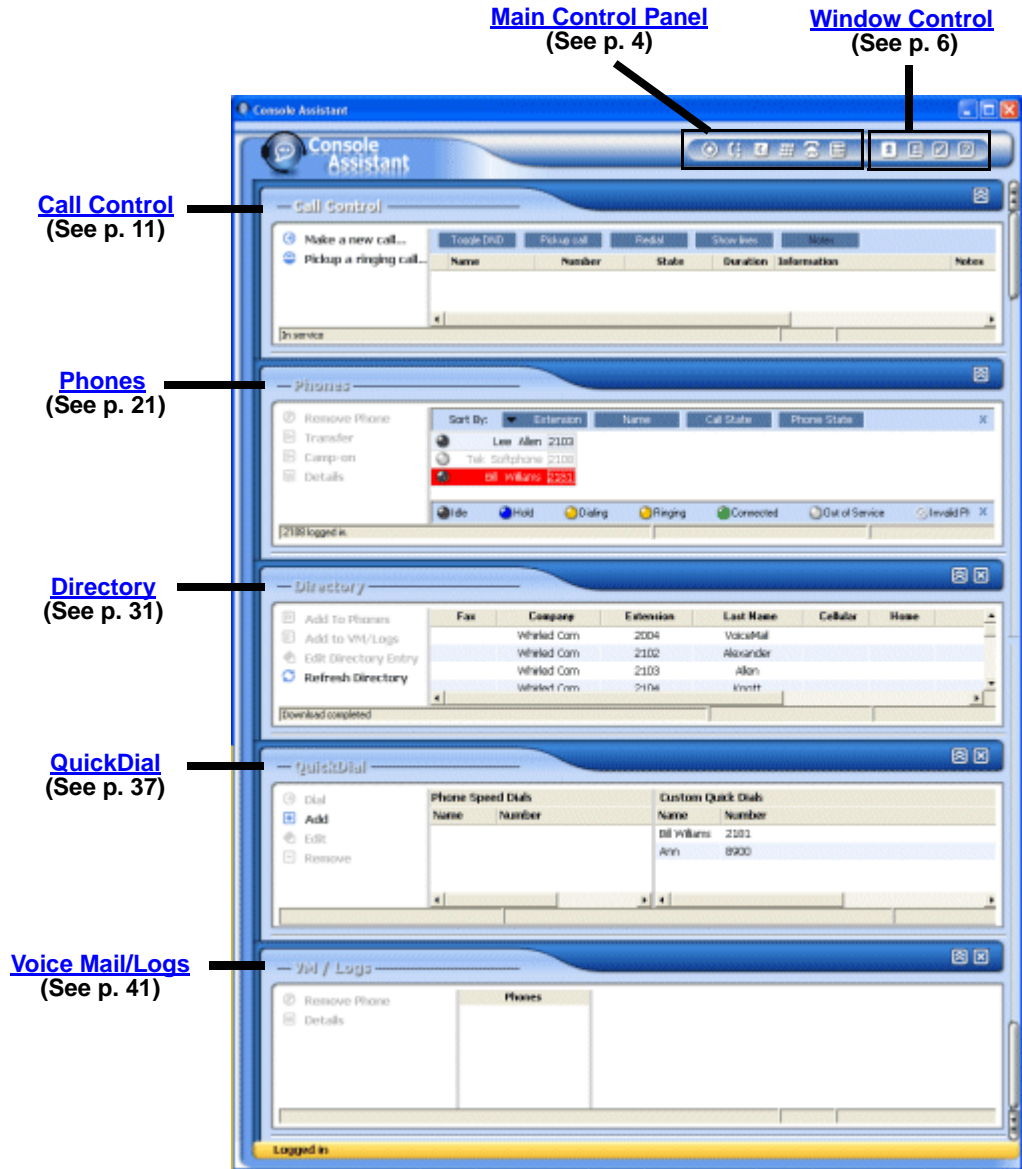
## Changing the Login Password

The login password for Console Assistant is configured by the system administrator. It cannot be changed from the Console Assistant application. If you need to change the password, contact your system administrator.

## Console Assistant Overview

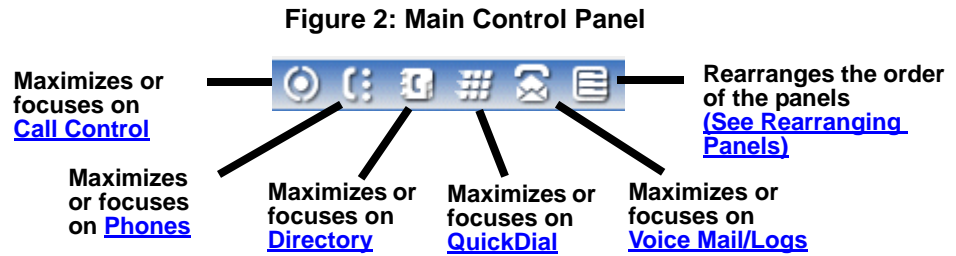
The Console Assistant dashboard is shown in Figure 1. Each panel of the dashboard is described in a separate section. Refer to the labels on the picture of the Console Assistant below to find out more about each panel.

Figure 1: The Console Assistant Dashboard





### Main Control Panel

The Main Control Panel is located at the top of the Console Assistant application. The buttons in this area allow you login, display the hidden panels of the application, view the event logs, or rearrange the panels.



## Expanding/Collapsing Panels

You can customize the layout of the Console Assistant by collapsing any of the panels.


- To collapse a panel, click on the  button for that panel.
- To expand a panel, click on the  button for that panel.

When a panel is minimized, you can also maximize it and set the focus on that panel using the buttons on the Main Control Panel as indicated in the following diagram.

## Rearranging Panels

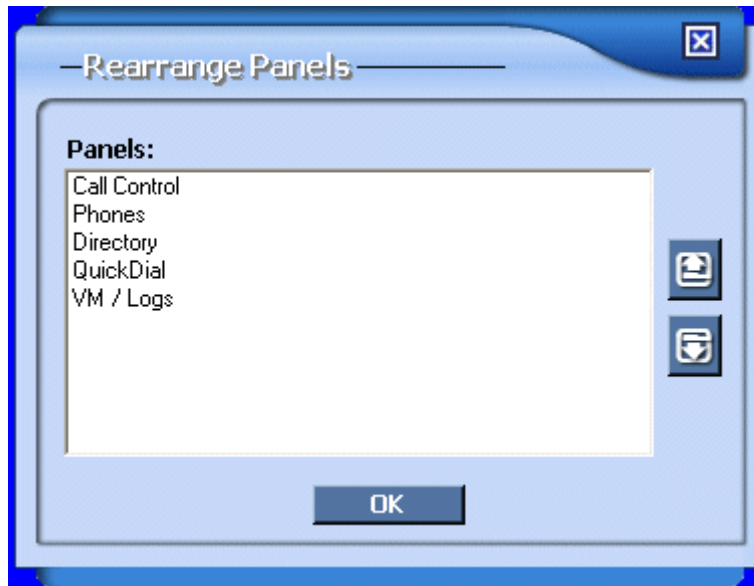
By default, the panels are displayed in the following order:

- Call Control
- Phones
- Directory
- QuickDial
- VM / Logs

However, the panels can be rearranged by clicking on the Rearrange button  in the Main Control Panel. This brings up the dialog shown in Figure 3.

To rearrange the panels, click on one that you wish to move, and click the up or down arrows on the right to reorder the list. When you click OK, the panels will be in the order specified. Also, the [Main Control Panel](#) icons will be rearranged to reflect the new panel order.

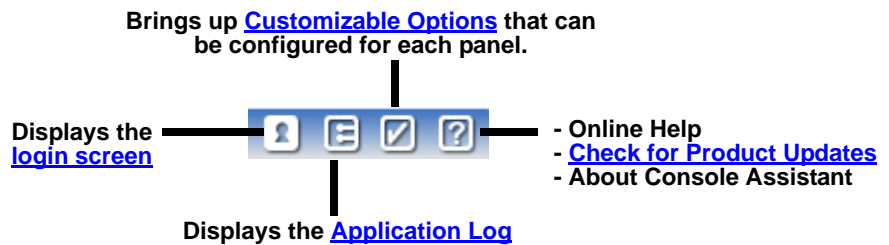
Figure 3: Rearrange Panels Dialog



## Window Control

The Console Assistant window can be managed using the buttons in the upper right corner of the application control the window, as shown in the figure below.

Figure 4: Window Control




## Keyboard Shortcuts

You can use the following keyboard shortcuts with Console Assistant.

Action	Keyboard Shortcut
Answer	F2
Release	F3
Hold	F4
Park	F5
Redial	F6

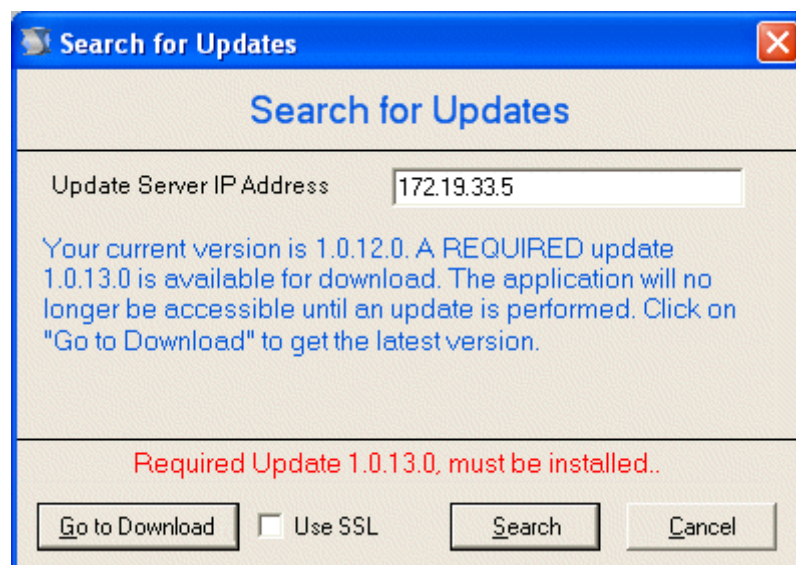
Action	Keyboard Shortcut
Answer Ringing	F7

## Download Manager

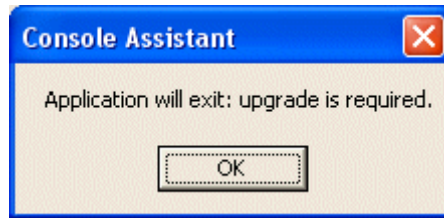
You can check for updates by clicking in the Main Control Panel on the **Help** button . Then select **Check for Updates**.

If there is an update available, a pop-up will notify you that you must download the update in order for the Console Assistant to continue to operate. The following steps describe the download process.

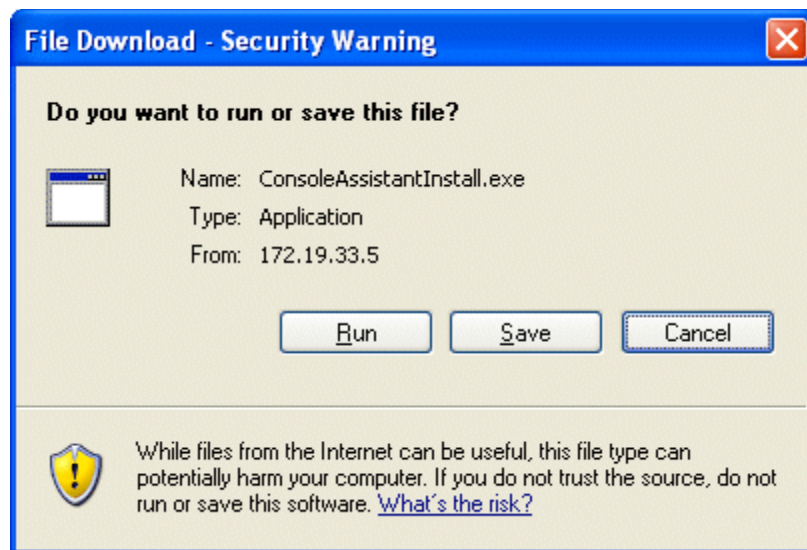
1. The first dialog that pops up will notify you if a required update is available. Your service provider should have provided with an **Update Server IP Address** to fill in the field, if it is blank.
2. Check the **Use SSL** checkbox if your service provider instructs you to. This will be required if the provider is using a secure server to provide application updates.
3. Click **Go to Download** to continue, or **Cancel** to keep the current version.



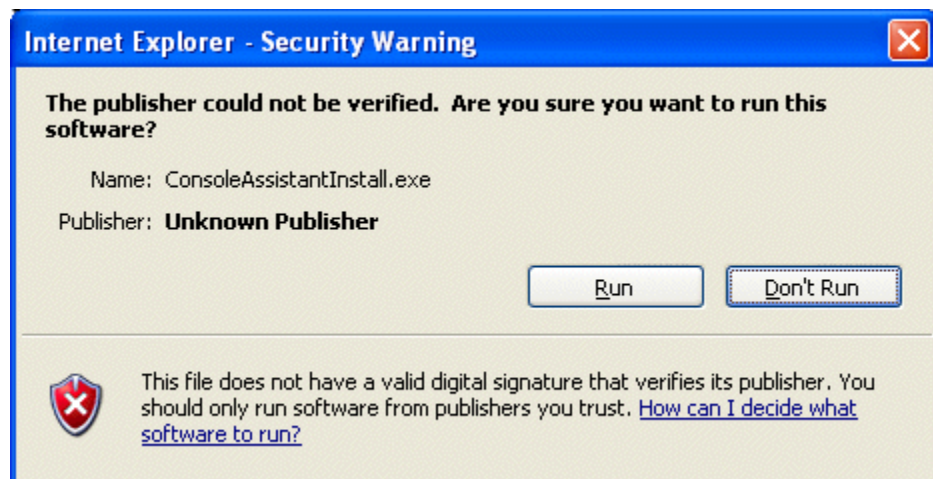
4. Your web browser will pop up a dialog stating that the application will exit. Click **OK**.



5. Next, a web page will pop up with a link to download the new version of the application. Click on the underlined link on the web page. (You will need to close this web page manually).
6. Next, a dialog will appear asking if you want to run or save the file. Click **Run**.




7. The next dialog is about the publisher. Click **Run** again.



8. The software will download and the extraction process begins. Click **Extract** on the dialog.
9. Next, the *InstallShield Wizard* appears. Click **Next** to continue.
10. On the *Program Maintenance* dialog, ensure the **Modify** radio button is selected, then click **Next**.
11. On the *Custom Setup* dialog that appears next, click the **Next** button.
12. The next dialog prompts for the destination directory where the application will be installed. Click **Next**, or optionally choose a destination folder for the application.
13. A dialog appears showing the current download settings. Click **Install**.
14. On the final dialog, click **Finish** to complete the download.

## Application Log

The Application Log is created and stored automatically as you work with the Console Assistant. This log is mainly used by the customer support team to view any messages that may have been generated.

To access the Application Log, click on the **Application Log** button  in the Main Control Panel.

You can sort on the panel and the level of the error. You can also export the log to a comma separated value (CSV) file and import any exported logs.

The logs are stored in RAM and will collect a maximum of 5000 records. When the log is full and a new record needs to be added, the oldest record will be removed and the new record will be appended to the log.





The Call Control panel of the Console Assistant is where all incoming and outgoing calls from the monitored phone will be displayed. The controls to the left of the call list will change depending on the state of the highlighted call. Refer to the following sections for information on the various call states.

***In this section:***

- ✓ [“Call Status - At a Glance” on page 12](#)
- ✓ [“Incoming Call Control” on page 12](#)
- ✓ [“Call Disposition Pop-up” on page 14](#)
- ✓ [“Active Call Control” on page 14](#)
- ✓ [“Outgoing Call Control” on page 18](#)
- ✓ [“General Call Control” on page 18 \(Toggle DND, Pickup call, Redial, Show lines\)](#)
- ✓ [“Customizing the Call Control Panel” on page 19](#)

## Call Status - At a Glance

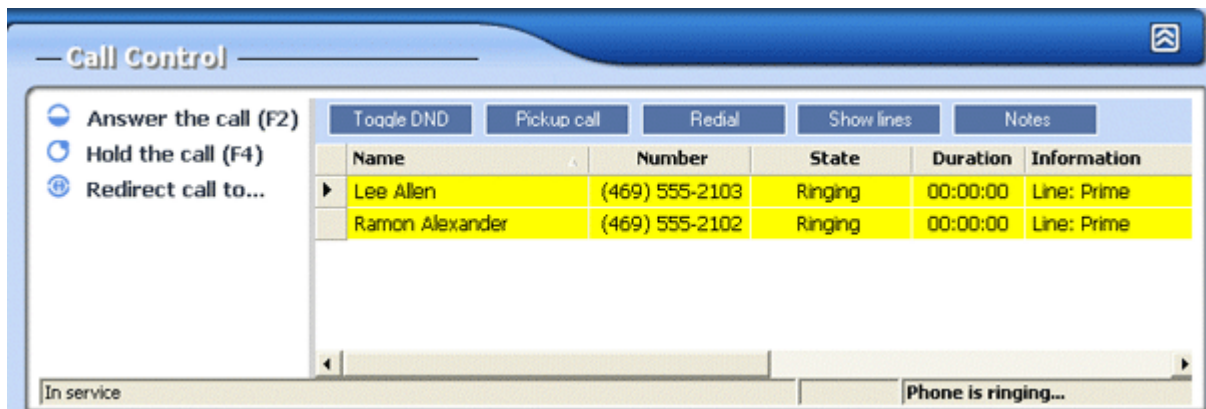
The calls displayed in the Call Control panel are color-coded to indicate the state of the call. The following table describes the color states.

Color	Description
Ringling	Yellow background - Incoming call
Active	Green background - Active call
On hold	Blue background - Call is on hold
Camped to 2185	Light blue background - Call is camped on another line
Parked	Grey background - Call is parked. This will only show in the Call Control panel if you have selected <b>Options &gt; Call Control &gt; Show parked calls...</b> These may be manually cleared from the Call Log using the <b>Clear parked</b> button.

## Incoming Call Control

When one or more calls are incoming to your phone, the Call Control panel will show the calls highlighted in yellow. The highlighted call that has the black arrow to the left of it is the call that will be controlled by the buttons on the left. Click on the desired call to change the focus (reposition the black arrow) to the call you want to control.

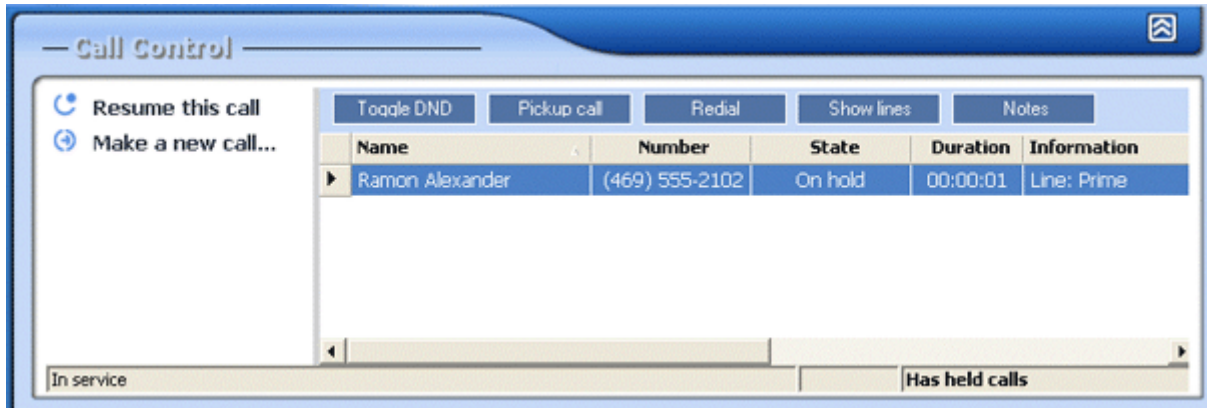
Figure 5: Call Control - Incoming Call



Click on the control buttons on the left to:

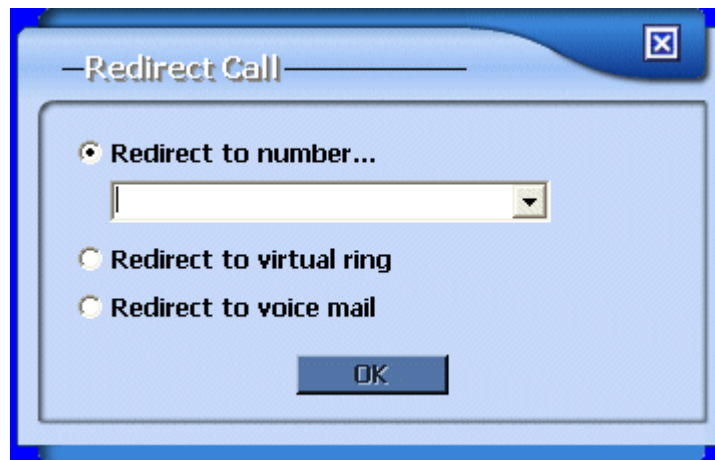
- **Answer the call** (or press the F2 key)
- **Hold the call** – Held calls are highlighted in blue; to resume a held call, click **Resume this call**

Figure 6: Call Control - Held Call



- **Redirect call to** – Brings up a separate dialog where you can choose where to redirect the call.

Figure 7: Redirect Call Dialog

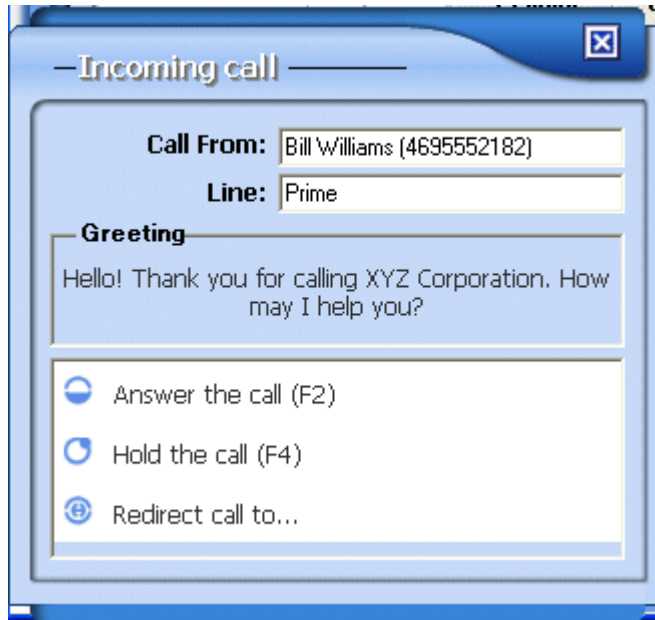


- **Redirect to number** – sends the call to the number specified. Enter a number to redirect the call to, or choose one from the pull-down list.
- **Redirect to virtual ring** – the caller will hear an endless ringing but the phone will not ring at the destination. The caller will not go to voice mail and must eventually hang up.
- **Redirect to voice mail** – sends the caller directly to the voice mail of the phone number entered.

## Call Disposition Pop-up

You can set an option to have a Call Disposition Pop-up appear when a call is incoming. The pop-up window, shown in will display in the lower left corner of your screen.

**Figure 8: Call Disposition Pop-up Window**



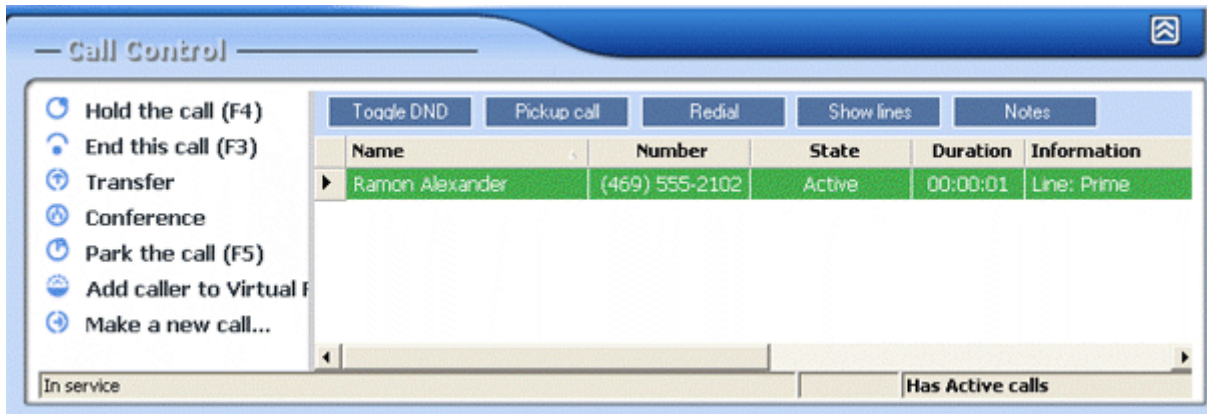
The Call Disposition Pop-up displays the following information:

- **Call From** – Shows the caller ID and phone number of the caller
- **Line** – Shows the line the call is coming in on
- **Greeting** – Displays the greeting that should be used when answering the call. This greeting is specified in the Call Control Options. Refer to [“Greetings” on page 53](#) for more information.
- **Answer the call (F2)** – Click here or press the F2 key to answer the call.
- **Hold the call (F4)** – Click here or press the F4 key to put the call on hold without answering it.
- **Redirect call to...** – This selection will bring up the Redirect Call dialog shown in [Figure 7 on page 13](#). For more information on call redirection, see [“Incoming Call Control” on page 12](#).

## Active Call Control

When there is an active call in progress, the Call Control panel will show different controls. Active calls are highlighted in green.

Figure 9: Call Control: Active Call Dialog



Click on the control buttons on the left to:

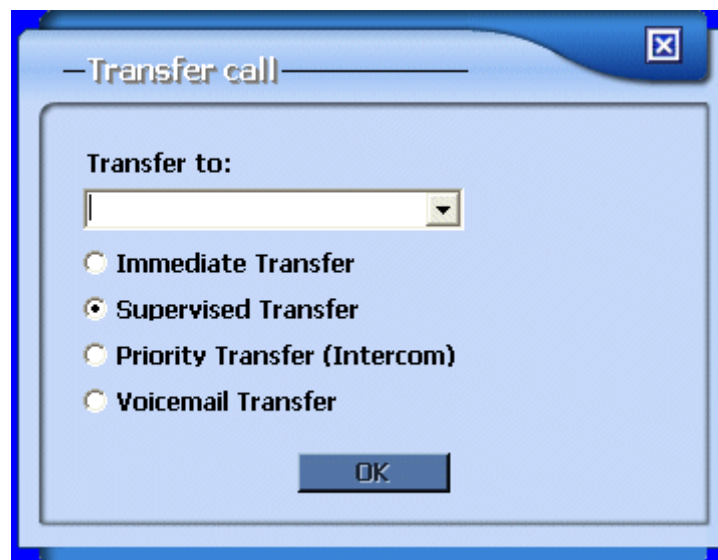
- **Hold the call** – Held calls are highlighted in blue; to resume a held call, click **Resume this call**
- **End this call**
- **Transfer** – this button will bring up a separate dialog where you can choose where to transfer the call.

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**NOTE:** You can also transfer a call by left-clicking on the active call and dragging it to one of the phones in the *Phones* list.

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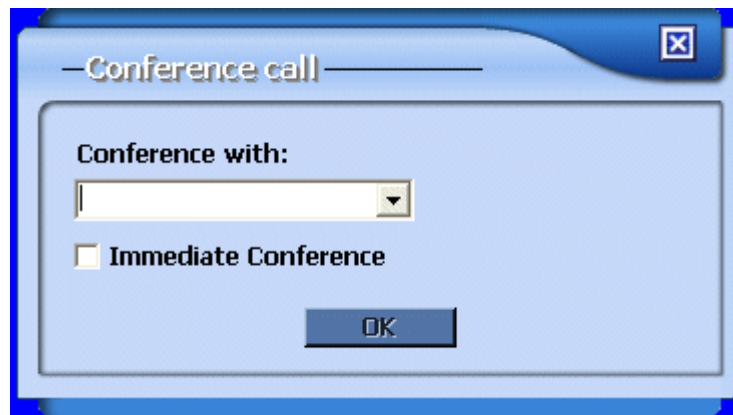
Figure 10: Call Control Transfer Dialog



- Enter a number to transfer the call to, or choose one from the pull-down list. Choose one of the radio buttons to direct the call.
- **Immediate Transfer** – transfers the call without notifying the receiver

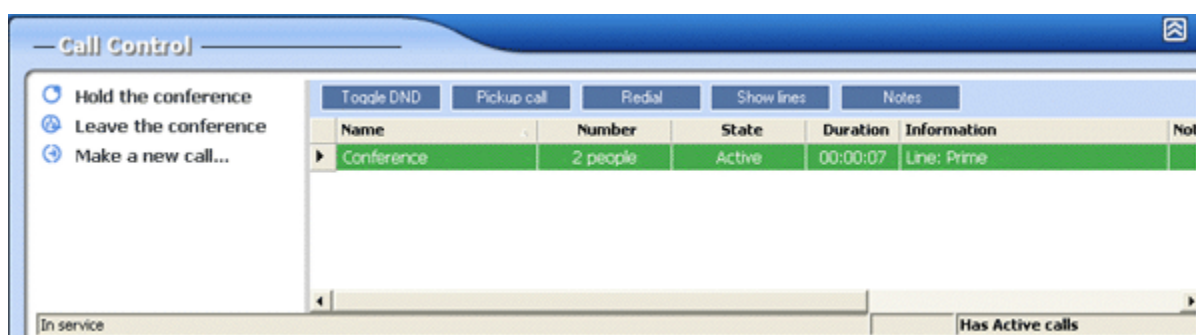
- **Supervised Transfer** – calls the receiver prior to transfer so that you can tell them who is calling and then transfer the call. When the called party answers, click **Complete Transfer** in the Call Control panel to transfer the call. To cancel the transfer, hang up the second call, then click **Resume** to take the caller off of hold.
- **Priority Transfer (Intercom)** – causes the receiver’s phone to emit a dial-tone, then transfers the call to the receiver’s phone. If the receiver of the call does not pick up the handset of their phone, they will hear the call on their speakerphone.
- **Voicemail Transfer** – transfers the call to the receiver’s voice mail.
- **Conference** – brings up a separate dialog where you can enter the number of a person to add to a 3-way conference.

Figure 11: Call Control Conference Dialog



- Enter a number to add the call to, or choose one from the pull-down list.
- Click **Immediate Conference** if you do not need to speak to the third party before adding them to the conference. They will be added to the conference call when they answer the phone.
- If the **Immediate Conference** box is *NOT* checked, then the first call will be put on hold while you talk with the third party and notify them that you are adding them to the conference. The buttons on the left change as shown in Figure 12 on page 17.
  - [Hold the call](#)
  - **End this call**
  - [Complete Transfer](#) – transfers the call and disconnects you.
  - **Complete Conference** – connects the third party to the call.
  - [Park the call](#)
  - **Add the caller to virtual ring**
  - [Make a new call](#)

Figure 12: Conference Call - Supervised Conference




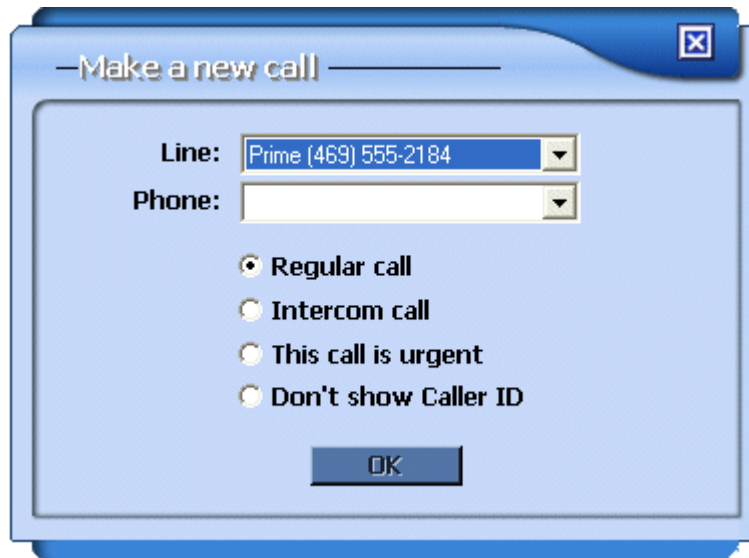
- While a conference call is in progress, the Call Control panel will allow you to **Hold the Conference** or **Leave the Conference**, which will leave the other two parties connected. You can also [Make a new call](#).
- **Park the call** – parks the call.
  - A pop-up dialog notifies you of the extension where the call is parked.
  - Hang up the phone and click **OK** on the dialog to close it.
  - Retrieve the call by dialing the Park extension.
- **Add caller to virtual ring** – adds the caller's number to a list of numbers that will go straight to virtual ring when they call. The caller will hear an endless ringing but the phone will not really ring at the destination. The caller will not go to voice mail and must eventually hang up. To view the Virtual Ring list, click on the Call Control **Options** button .
- **Make a new call** – pops up a dialog allowing you to enter a number to dial. Choose which line on your phone to use by pulling down the drop-down list on the dialog. Enter a number to dial in the text box, or pull down to choose one you dialed before. Select from the following call options:
  - **Regular call**
  - **Intercom call** – emits a dial tone on the receiver's phone and then connects you to their speakerphone, if they have one. Otherwise, it will ring the phone.
  - **This call is urgent** – causes the phone to use a distinctive ring indicating the call is urgent.
  - **Don't show my Caller ID** – suppresses your caller ID to the call receiver.

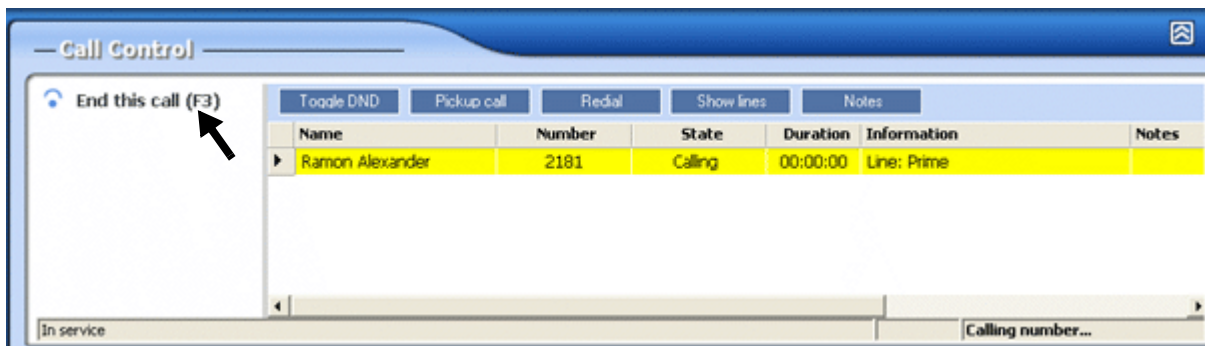
Figure 13: Make a Call Dialog



## Outgoing Call Control

When there is an outgoing call in progress, the only option shown on the left is to **End this call**. Clicking this button will hang up the call.

Figure 14: Outgoing Call Control



## General Call Control

When there are no incoming calls, the Call Control panel allows you to do the following functions:

- [Make a new call](#)
- **Pickup a ringing call** – When clicked, it allows you to enter a number of a ringing line to pick up, or picks up a call in your Pickup Group. If you know a call is ringing in another person’s office, and you are part of their Pickup Group, then you can click this button to pick up the call.
- **Turn on Do Not Disturb** – Turn on or off Do Not Disturb



Figure 15: Call Control Panel - No Active Calls






The top bar of the Call Control panel displays four buttons that allow you to:

- **Toggle DND** – Turn on or off Do Not Disturb
- **Pickup call** – Works the same as the [Pickup a ringing call](#) button.
- **Redial** – Redials the number selected from the pull-down list.
- **Show lines** – Shows the calls on all of the lines on your phone.
- **Notes** – Allows you to enter a reminder to yourself while for an incoming, active or held call. Your entries will appear in the *Information* column. Note that this information will be deleted when the call ends.
- **Clear parked** – Clears all parked calls listed in the call history. Parked calls are only shown if you have selected **Options > Call Control > Show parked calls in call history...**

## Customizing the Call Control Panel

The Call Control panel can be expanded and collapsed by clicking on the buttons in the top right corner.

Button	Description
	Collapse – click to minimize (shrink) the panel to just show the tab.
	Expand – click to expand the panel to full size again.

You can customize many features on the Call Control panel by clicking the **Options** button  in the upper right corner of the Console Assistant.

For details on customizing the Call Control Panel, please refer to [“Customizable Options” on page 49](#).



The *Phones* section allows you to add phones that you would like to monitor from Console Assistant Directory. You create this list yourself by adding phones to the list.

---

**NOTE:** You cannot add to the Phones list your own Console Assistant phone, other Console Assistant phones, or users listed in the Directory that do not have an extension.

---

### ***In this section:***

- ✓ [“Phones List Colors - At a Glance” on page 22](#)
- ✓ [“Add Phones” on page 23](#)
- ✓ [“Remove Phones” on page 23](#)
- ✓ [“Transfer” on page 23](#)
- ✓ [“Immediate \(Blind\) Transfer” on page 24](#)
- ✓ [“Camp-on” on page 25](#)
- ✓ [“View Details on a Phone” on page 26](#)
- ✓ [“Customizing the Phones Panel” on page 27](#)

## Phones List Colors - At a Glance


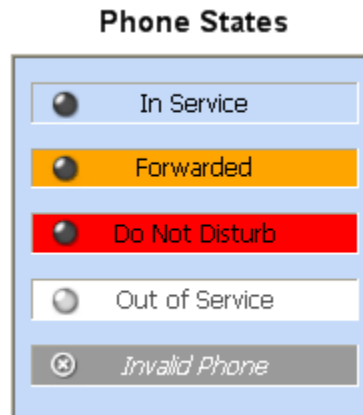











The following diagram can be found by clicking on the Options button  at the top of the application, and choosing **Phones** from the *Folder* drop-down. Then select the *Color Legend* tab.

Figure 16: Phones List States



Also, next to each phone being monitored in the Phones panel, there will be an icon indicating the phone status. The following table shows the status icons.

Icon	State	Description
	Idle	Phone is on-hook.
	(blinking) Ringing or Dialing	When blinking, phone is receiving an incoming call. When steady, phone is off-hook and a number is being dialed.
	Connected	Phone is in an active call. If you need to transfer a call to this phone, you can <a href="#">camp-on</a> the phone which will prompt you when the phone is idle.
	Hold	Phone is on hold. If you need to transfer a call to this phone, you can <a href="#">camp-on</a> the phone which will prompt you when the phone is idle.
	Out of Service	Phone is provisioned in the database, but it is not currently connected to the network.
	Invalid	Phone has been deleted from the database. You will need to <a href="#">remove</a> these phones from the Phones list manually.
	Voice Mail Only User	The user is provisioned in the database, but they have no physical phone. They can dial in to retrieve their voice mail.

Icon	State	Description
	VIP	The user has been marked as a VIP user.
	Hunt Group	This is a Hunt Group main line that you can transfer a call to.
	Queue	This is a ACD Queue main line that you can transfer a call to.
	Number Plan	This is a Number Plan that you can transfer a call to.

## Add Phones

To add phones to the Phones list, go to the [Directory](#) panel and click to select the phone from the list that you wish to add. Click the [Add to Phones](#) button on the left of the Directory listing.

## Remove Phones

You can remove any individual entry in the Phones list by:

- selecting the entry and clicking **Remove Phone**, or
- right-click on the highlighted phone and select **Remove Selected Phone** from the drop-down menu.

To remove all of the phones in the list

- click on the first entry, then press the Control key and click on the last entry. Then, with all of the phones in the list highlighted, click **Remove Phones**, or
- right-click and select **Remove All Phones** from the drop-down menu.

## Transfer

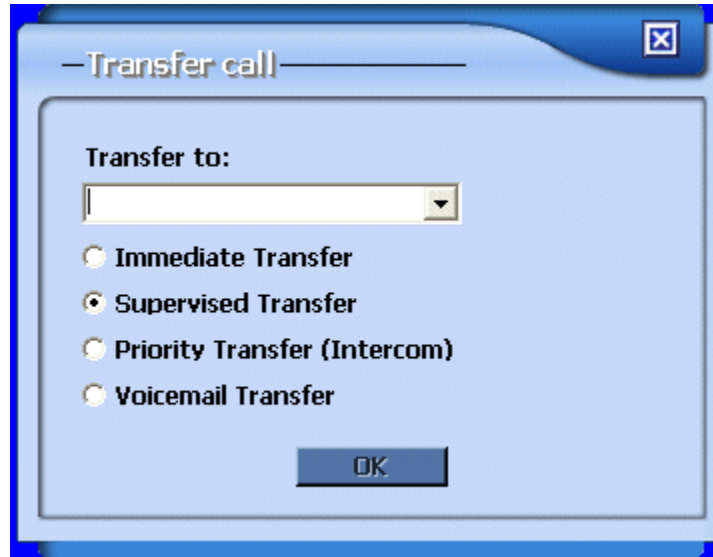
From the Phones panel, you can also transfer an active call on the Console Assistant phone.

To transfer a phone:

1. In the Call Control panel, click on the active call that you wish to transfer.
2. To choose which phone to transfer call to, do one of the following:
  - double-click on a phone in the Phones list,
  - click on the phone and select **Transfer** on the left, or
  - right-click on the phone in the Phones list and click on **Transfer**.

3. The dialog shown in Figure 17 is displayed. Select the desired transfer option (described below) and click **OK**.


Figure 17: Phones Transfer Dialog



- **Immediate Transfer** – transfers the call without notifying the receiver.
- **Supervised Transfer** – calls the receiver prior to transfer so that you can tell them who is calling and then transfer the call. When the called party answers, click **Complete Transfer** in the Call Control panel to transfer the call. To cancel the transfer, hang up the second call, then click **Resume** to take the caller off of hold.
- **Priority Transfer (Intercom)** – this is only available when calling a phone that has a speakerphone. It causes the receiver’s phone to emit a dial-tone, then transfers the call to the receiver’s phone. If the receiver of the call does not pick up the handset of their phone, they will hear the call on their speakerphone.
- **Voicemail Transfer** – transfers the call to the receiver’s voice mail.

## Immediate (Blind) Transfer

You can immediately transfer a caller to a phone in your Phones list by following these steps:

1. First, ensure you have the options set correctly. Click on the Options button . Then click on **Call Control > Actions**. Make sure the “Default double-click action for connected (active) call” is set to **Transfer to Selected Phone**.
2. When you want to transfer a call:
  - a. In the Phones list, click on the person you want to transfer to.
  - b. Double-click on the active phone call in the Call Control list.

The phone call will be transferred to the selected phone immediately.

## Camp-on

When a call comes in for someone that you need to transfer to, but their phone is busy, you can camp on the line. When the phone becomes available, the call can be transferred.

---

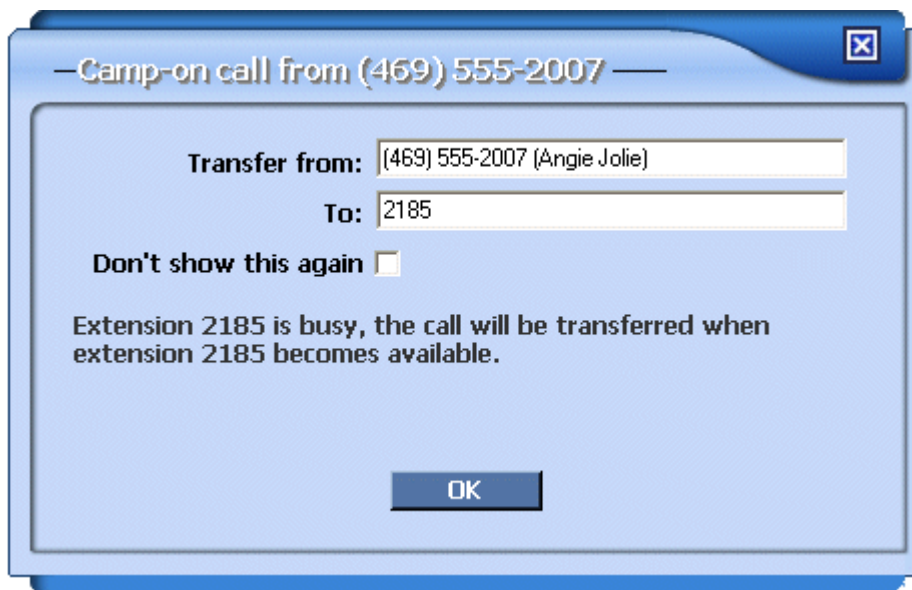
**NOTE:** Only one call can be camped on a line at one time.

---

To camp on a line:

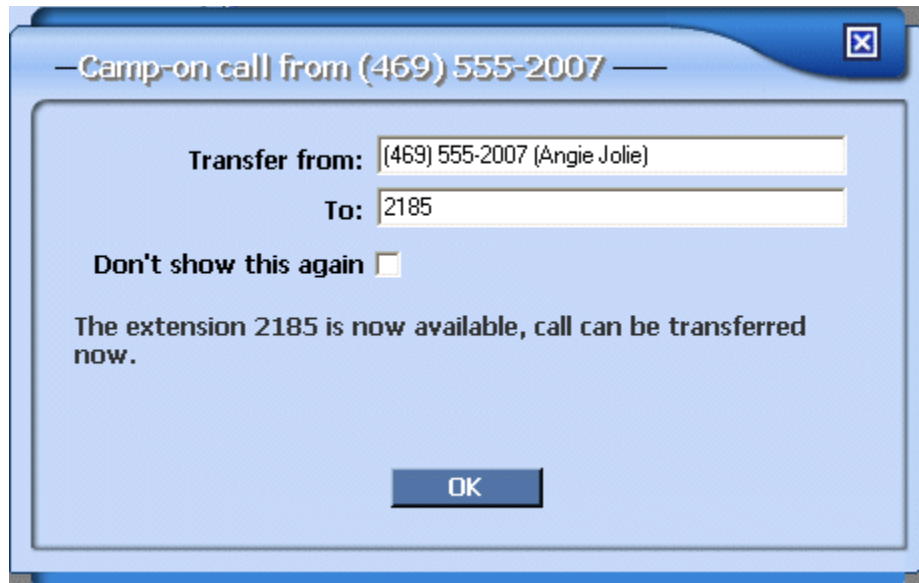
1. Select the active call in the Call Control panel that you want to transfer.
2. Select the busy phone in the Phones panel that you want to transfer the caller to.
3. Click on **Camp-on**. The dialog shown in Figure 18 is presented.
  - When you click **OK**, the active call will be put on hold until the line that they are camped on becomes free.
  - You can select the check box to not show this dialog again.

**Figure 18: Camp-on Dialog – Destination is Busy**



4. When the receiver's phone becomes available, the dialog shown in Figure 19 is presented.
  - The waiting call will immediately transfer when you click **OK**
  - You can select the check box to not show this dialog again.

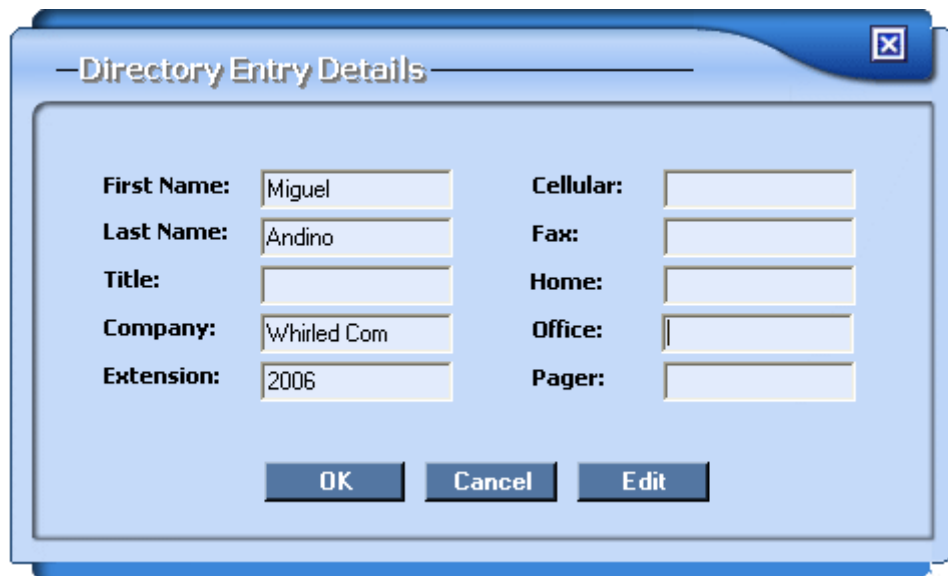
Figure 19: Camp-on Dialog – Destination is Available



## View Details on a Phone

Select any entry in the Phones panel and click on **Details** to view or edit the detailed information for this user. You can also view the details for a phone by right-clicking on the entry and selecting **Phone Details...** from the drop-down list.

Figure 20: Phone Details Dialog






When you click the **Edit** button, you can then add information in the text fields on the right side of the dialog (*Office, Cellular, Fax, Home and Pager*). This information will then be displayed in the Directory panel.



## Customizing the Phones Panel

The Phones panel can be expanded and collapsed by clicking on the buttons in the top right corner.

Button	Description
	Collapse – click to minimize (shrink) the panel to just show the tab.
	Expand – click to expand the panel to full size again.

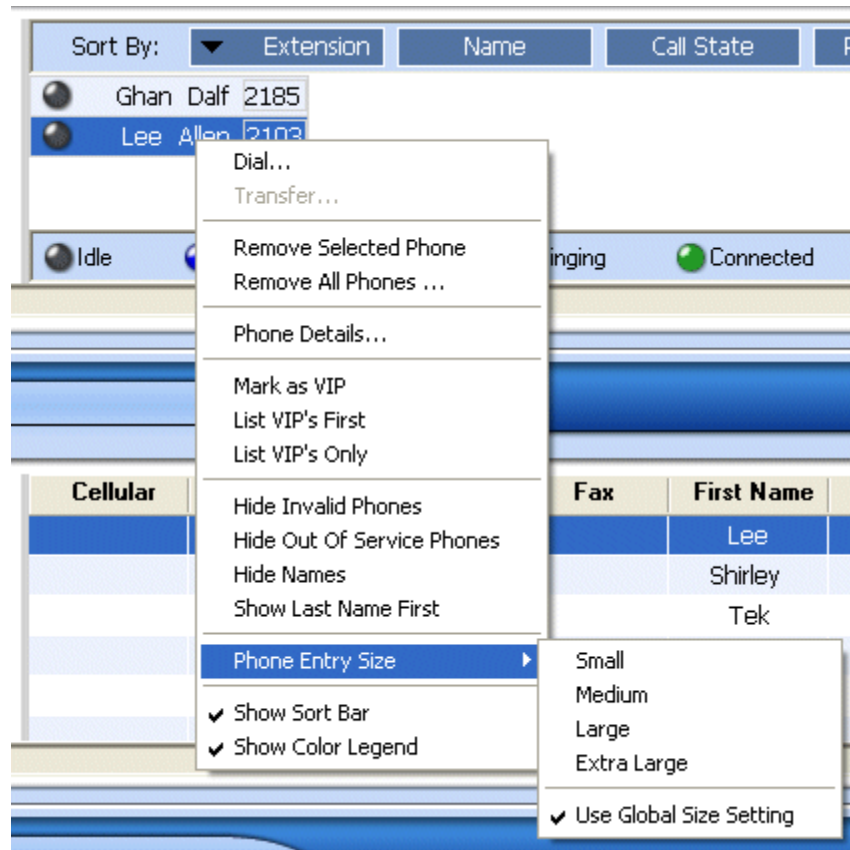
You can customize many features on the Phones panel by clicking the **Options** button  in the upper right corner of the Console Assistant.

For details on customizing the Phones panel, please refer to For details on customizing the Call Control Panel, please refer to [“Customizable Options” on page 49](#).

## Phones Drop-Down List Functions

If you right-click on an entry in the Phones list, you will see the drop-down menu as shown in [Figure 21](#).

Figure 21: Phones Panel Drop-down Menu



You can perform operations on the phones in the list and customize the list itself by clicking on the following:

- **Dial...** – dials the currently selected entry.
- **Transfer** – if it is not grayed out, this selection will transfer an active call that is currently selected in the Call Control panel to the selected phone in the Phones panel. (See [“Transfer” on page 23](#))
- **Remove Selected Phone** – removes the selected phone from the list. (See [“Remove Phones” on page 23](#))
- **Remove All Phones...** – removes the selected phone from the list. (See [“Remove Phones” on page 23](#))
- **Phone Details** – Displays the Directory Entry Details dialog, which allows you to view or edit phone details.
- **List VIPs First** – will show all the entries that you have marked as “VIP” first before any other entries in the Phones panel. The other entries will be sorted in alphabetical order.
- **List VIPs Only** – will list only those entries in the Phones list that have been marked as “VIP”.

- **Hide Invalid Phones** – eliminates all phones from the list that are “Invalid”. These are phones that have been deleted from the system database because the user has been deleted. You must remove these phones physically from the Phones panel, but they will automatically be removed from the Directory panel 30 minutes after the deletion.
- **Hide Out of Service Phones** – this will hide any out-of-service phones from your Phones list. When the phone goes in-service again, it will be displayed in the list.
- **Hide Names** – When this checked, only the extensions will be displayed for each phone.
- **Show Last Name First** – When checked, this displays and sorts the entries in the list by last name first, then first name. Then, if you wish to sort the list based on last name, select the **Name** sort button.
- **Phone Entry Size** – This selection brings up a pull-right menu that allows you to set the font size of entries in the Phones list. The selections are **Small**, **Medium**, **Large** and **Extra Large**. You can also choose to **Use Global Size** Setting that is chosen from the Options panel.
- **Show Sort Bar** – This is enabled by default and causes the Sort Bar to be displayed across the top of the panel. See [“Sorting the Phones List” on page 29](#).
- **Show Color Legend** – This is enabled by default and causes the Sort Bar to be displayed across the top of the panel. See [“Color Legend” on page 59](#).

## Specifying VIP Phones

You can mark any of the phones in your Phones list as being VIPs (Very Important Persons). To specify a phone as VIP, right-click on an entry in the list to display the drop-down menu shown in Figure 21.

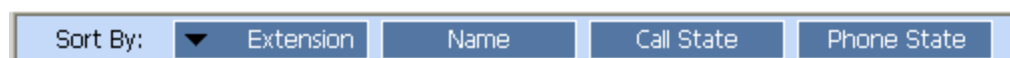
You can mark a phone as VIP by selecting **Mark as VIP**. You can also:

- list just the VIP phones by selecting **List VIPs Only** and/or
- sort the list to just show the VIPs first by selecting **List VIPs First**.

## Sorting the Phones List

You can sort the Phones list using the Sort bar at the top of the panel. If the Sort bar is not visible, right-click on an entry in the Phones list and select **Show Sort Bar** to display it.

Figure 22: Phones Panel - Sort Bar



To close the Sort Bar, you can click on the **X** on the right side of the bar.

You can sort the list in either ascending or descending order by clicking on the buttons for:

- Extension (note that the sort order may not be as expected if you have a mix of extensions with varying numbers of digits)
- Name
- Call State (alphabetically)
- Phone State (alphabetically)

The black arrow shows the current order of the list. The arrow pointing up means the list is in ascending order. The arrow pointing down indicates the list is sorted in descending order.

The Directory panel of the Console Assistant displays the company directory. It is automatically populated with the numbers of all of the phones in the system.

When an entry in the Directory is selected, the buttons to the left become active. You can also right-click on a directory entry to bring up a context-sensitive menu.

***In this section:***

- ✓ [“Add to Phones” on page 32](#)
- ✓ [“Add to Voice Mail/Logs” on page 32](#)
- ✓ [“Details/Edit Entry” on page 32](#)
- ✓ [“Refresh Directory” on page 33](#)
- ✓ [“Search” on page 33](#)
- ✓ [“Customizing the Directory” on page 34](#)

## Add to Phones

You can add the Directory entries that have extensions to your monitored Phones list by:

- dragging and dropping the entry from the *Directory* tab to the *Phones* tab, or
- selecting a Directory entry and clicking **Add to Phones**.

When an entry is in the Phones list, you can monitor the status of the phone and perform other functions on that phone.

If you have already added an entry to the Phones list, an error message will be presented reminding you that you are already monitoring that phone.

---

**NOTE:** You cannot add to the Phones list your own Console Assistant phone, other Console Assistant phones, or users listed in the Directory that do not have an extension.

---

## Add to Voice Mail/Logs

You can add the Directory entries that have extensions to your Voice Mail/Logs list by:

- dragging and dropping the entry from the *Directory* tab to the *VM/Logs* tab, or
- selecting a Directory entry and clicking **Add to VM/Logs**.

When an entry is in the VM/Logs list, you can view the call logs and access the voice mailbox for that phone. You will need the phone's voice mail password to access the logs and voice mail.

If you have already added an entry to the VM/Logs list, an error message will be presented reminding you that you are already added that phone.

## Details/Edit Entry

You can edit the directory entries by right-clicking on an entry in the Directory and clicking on **Details/Edit Entry...** The following dialog box will be displayed:

Figure 23: Phone Details Dialog

First Name:	Miguel	Cellular:	
Last Name:	Andino	Fax:	
Title:		Home:	
Company:	Whirled Com	Office:	
Extension:	2006	Pager:	

OK Cancel Edit

Enter new information or modify any of the existing information in the fields on the right side of the dialog. The information entered will be displayed in the Directory on the Console Assistant.

## Refresh Directory

The **Refresh Directory** button will access the database that contains the company directory and refresh the list. This may be necessary if you have had the Console Assistant running for a long time and you know that several new phones have been added to the directory.

## Search

The Search function in the Directory allows you to search the entire directory, or you can search based on certain criteria. The area at the top of the Directory provides fields to use to search the Directory, as shown in Figure 24.

Figure 24: Directory Search Bar





Search For  Search In All Fields


Click on the Close button to hide the Search Bar

If the Search bar is not visible, you can right-click on an entry in the Directory, and select **Show Search Bar** from the menu to bring up the Search bar. To hide the Search bar, click on the close button on the right.

## Customizing the Directory

The Directory panel can be customized by clicking on the buttons in the top right corner.

Button	Description
	Close – closes the Directory panel. Click on the <b>Directory</b> button  to open the panel again.
	Collapse – click to collapse (shrink) the panel to just show the tab.
	Expand – click to expand the panel to full size again.

You can customize many features on the Directory panel by clicking the **Options** button  in the upper right corner of the Console Assistant.

For details on customizing the Directory panel, please refer to [“Customizable Options” on page 49](#).

## Rearranging Columns in the Directory Panel

You can drag-and-drop the columns in the Directory panel to rearrange the order of the list.

To rearrange the columns:

- Click the heading of the column you want to move and drag it to the column you want to replace.

**Figure 25: Before Rearranging the Columns**

First Name	Last Name	Home	Company	Extension
No	VoiceMail		Whirled Com	2004
VM	Only		Whirled Com	2005
Ramon	Alexander		Whirled Com	2102
Lee	Allen		Whirled Com	2103
Shirley	Knott		Whirled Com	2104
Tek	Softphone		Whirled Com	2108
...	...	...	...	...

- Release the mouse button to drop it on top of the column you want it to replace (indicated by the background shading).



**Figure 26: Rearranging a Directory Column**

First Name	Last Name	Extension	Company	Extension
No	VoiceMail	2004	hirled Com	2004
VM	Only	2005	hirled Com	2005
Ramon	Alexander	2102	hirled Com	2102
Lee	Allen	2103	hirled Com	2103
Shirley	Knott	2104	hirled Com	2104
Tek	Softphone	2108	hirled Com	2108

**NOTE:** The column that is being moved will swap location with the column that you place it on as demonstrated in Figure 27.

**Figure 27: Results of Rearranging a Directory Column**

First Name	Last Name	Extension	Company	Home
Non-DID	Override	8000	Whirled Com	
Louise	Harrold	2190	Whirled Com	
Robert	Thornton	2189	Whirled Com	
Tom	Bomb	2188	Whirled Com	
Ghan	Dalf	2185	Whirled Com	
Gail	Adriel	2184	Whirled Com	

these two columns swapped

## Sorting the Directory

You can sort the directory by any column in ascending or descending order by clicking on the heading of the column. The entire directory listing will now be sorted by that column.

Click on the heading again to re-sort the list based on that value, but in the inverse (ascending or descending) order. A white arrow next to the heading shows the current sort order: a down-arrow indicates descending order, up-arrow indicates ascending order.



The QuickDial panel of the Console Assistant lists any speed dials predefined by your system administrator, or speed dials that you added using the Web Portal application. These speed dials are listed in the **Phone Speed Dials** column and cannot be modified from this application.

In the **Custom Quick Dials** panel, you can add any numbers that you regularly dial.

***In this section:***

- ✓ [“QuickDial a Number” on page 38](#)
- ✓ [“Add or Edit a Custom QuickDial” on page 38](#)
- ✓ [“Removing Custom QuickDials” on page 38](#)
- ✓ [“Sorting the QuickDial List” on page 39](#)
- ✓ [“Customizing QuickDial” on page 39](#)

## QuickDial a Number

To dial any of the numbers in the QuickDial or Custom QuickDial list, simply:

- click on the number to dial and click the **Dial** button, or
- double-click on the numbers in the lists to dial them, or
- right-click and select **Dial...** from the drop-down menu.

## Add or Edit a Custom QuickDial

To add a number to the Custom QuickDial list, click **Add** or right-click and select **Add...** from the drop-down menu. Enter the information for the phone into the dialog and click **OK**.

Figure 28: QuickDial Add



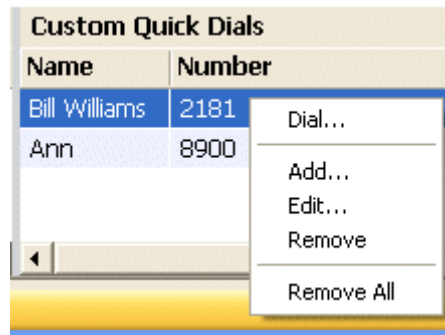
You can easily edit the Custom QuickDial numbers by clicking on the desired entry in the list and clicking **Edit**.

## Removing Custom QuickDials

To remove a Custom QuickDial, select the entry in the list and:

- click the **Remove** button, or
- right-click and select **Remove** from the drop-down menu.

Figure 29: QuickDial Drop-down Menu



You can also remove all of the Custom QuickDials from the list by right-clicking on any entry and selecting **Remove All**.

## Sorting the QuickDial List

You can sort the QuickDial list by clicking on the column titles. To sort by name, click on the Name column title. It will initially sort in ascending order. Click on the title again to sort in descending order.





---


**NOTE:** The sort order of the list may not be as expected if you have a mix of extensions with varying numbers of digits.

---

## Customizing QuickDial

The QuickDial panel can be customized by clicking on the buttons in the top right corner.

Button	Description
	Close – closes the QuickDial panel. Click on the <b>QuickDial</b> button  to open the QuickDial panel again.
	Collapse – click to minimize (shrink) the panel to just show the tab.
	Expand – click to expand the panel to full size again.

You can customize many features on the QuickDial panel by clicking the **Options** button  in the upper right corner of the Console Assistant.

For details on customizing the QuickDial Panel, please refer to [“Customizable Options” on page 49](#).



The VM/Logs panel shows all the voice mail messages that are in your voice mail inbox, as well as call logs. All incoming, outgoing and missed calls are displayed in the Call Log.

***In this section:***

- ✓ [“Adding Phones to the VM/Logs” on page 42](#)
- ✓ [“Removing Phones from VM/Logs” on page 42](#)
- ✓ [“Details on VM/Logs Phones” on page 42](#)
- ✓ [“Monitoring the VM/Logs Phones” on page 42](#)
- ✓ [“Customizing the VM/Logs” on page 47](#)

## Adding Phones to the VM/Logs

To add phones to the VM/Logs list, go to the [Directory](#) panel and click to select the phone from the list that you wish to add. Click the **Add to VM/Logs** button on the left of the Directory listing. See [“Add to Voice Mail/Logs” on page 32](#) for more information.

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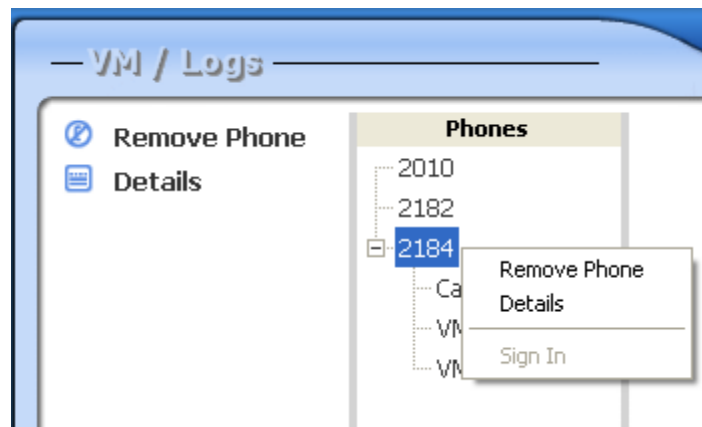
**NOTE:** You will want to be sure to add your Console Assistant phone to the VM/Logs list.

---

## Removing Phones from VM/Logs

You can remove a phone that has been added to the VM / Logs list by clicking on the phone in the list as shown in Figure 30. You can either right-click on the phone and select **Remove Phone** or select **Remove** from the left column.

Figure 30: Removing Phones from VM/Logs



## Details on VM/Logs Phones

You can view and edit details on the phones in the VM / Logs list by clicking on the phone in the list as shown in Figure 30. You can either right-click on the phone and select **Details** or select **Details** from the left column. See [“Details/Edit Entry” on page 32](#) for more information.

## Monitoring the VM/Logs Phones

When you click on one of the entries in the VM/Logs list, you will see a dialog asking for the password for that phone’s voice mail account. Enter the password for the voice mail account, or click the **Close** button to cancel.

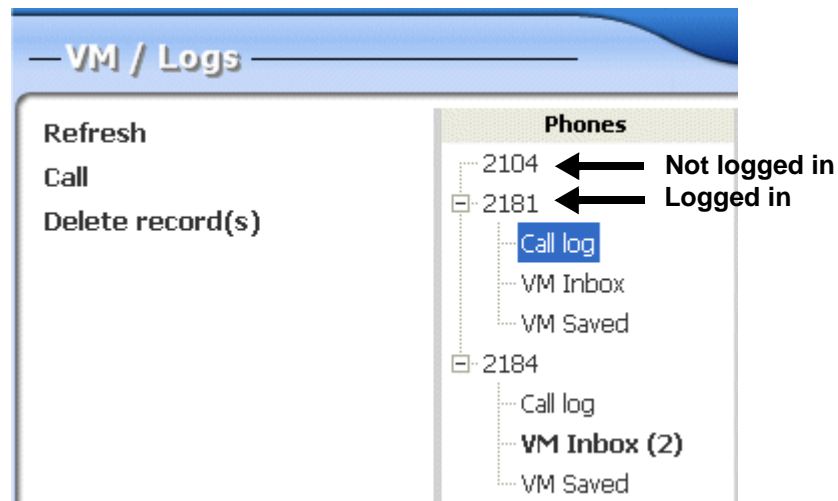


Figure 31: Voice Mail Password Dialog



After entering the password and you are successfully logged into the user's account, the entry in the list will have three new subfolders, as shown below:

Figure 32: The VM/Logs Entries When Logged In













- [Call Log](#) – click on this to display the call logs for this phone in the pane to the right.
- [VM Inbox](#) – click on this link to display the new voice mails for that phone.
- [VM Saved](#) – click on this link to display the saved voice mails for that phone.








## Call Log

The **Call Log** displayed in the right panel shows information about all incoming and outgoing calls on that phone.

Figure 33: Call Log

Select	Direction	Name	Number	Date/Time	Duration	Info
<input checked="" type="checkbox"/>		Robert Thornton	(469) 555-2189	03/17/2006 10:31	00:00:00	
<input type="checkbox"/>		Robert Thornton	2189	03/17/2006 10:31	00:00:00	
<input type="checkbox"/>		Robert Thornton	2189	03/17/2006 10:30	00:00:00	
<input type="checkbox"/>		Bob Roberts	(469) 555-3901	03/17/2006 10:29	00:00:00	
<input type="checkbox"/>		Robert Thornton	2189	03/15/2006 13:41	02:14:02	
<input type="checkbox"/>		Bob Roberts	(469) 555-3901	03/15/2006 13:40	00:04:00	
<input type="checkbox"/>			2189	03/15/2006 13:38	01:36:01	
<input type="checkbox"/>		Gail Adriel	2184	03/15/2006 13:26	00:00:00	
<input type="checkbox"/>		Gail Adriel	2184	03/15/2006 13:26	00:00:00	
<input type="checkbox"/>			2189	03/15/2006 13:25	00:00:00	

The following operations are available:

- **Refresh** the list by clicking on the left.
- Click on an entry and click **Call** to dial that phone (or double-click on the entry)
- Select one or more entries and click **Delete record(s)** to remove them from the list.
- You can sort the list by any column by clicking on the column title. A small white arrow shows the direction of the sort (either ascending or descending).
- The **Direction** column shows the call as:
  -  – incoming
  -  – outgoing
  -  – missed call
  -  – call was not answered and went to Voice Mail
  -  – phone was on Do Not Disturb, so the call went to Voice Mail
  -  – phone was busy, so the call went to Voice Mail
  -  – call was transferred to a Find-Me number that the user set up using Web Portal.

## VM Inbox and VM Saved

When you click on **VM Inbox**, you will see all of the voice mails in the phone's inbox. If you click on **VM Saved**, you will see all of the voice mails saved on the phone. Any unheard voice mails will be displayed in bold.

Figure 34: VM Inbox

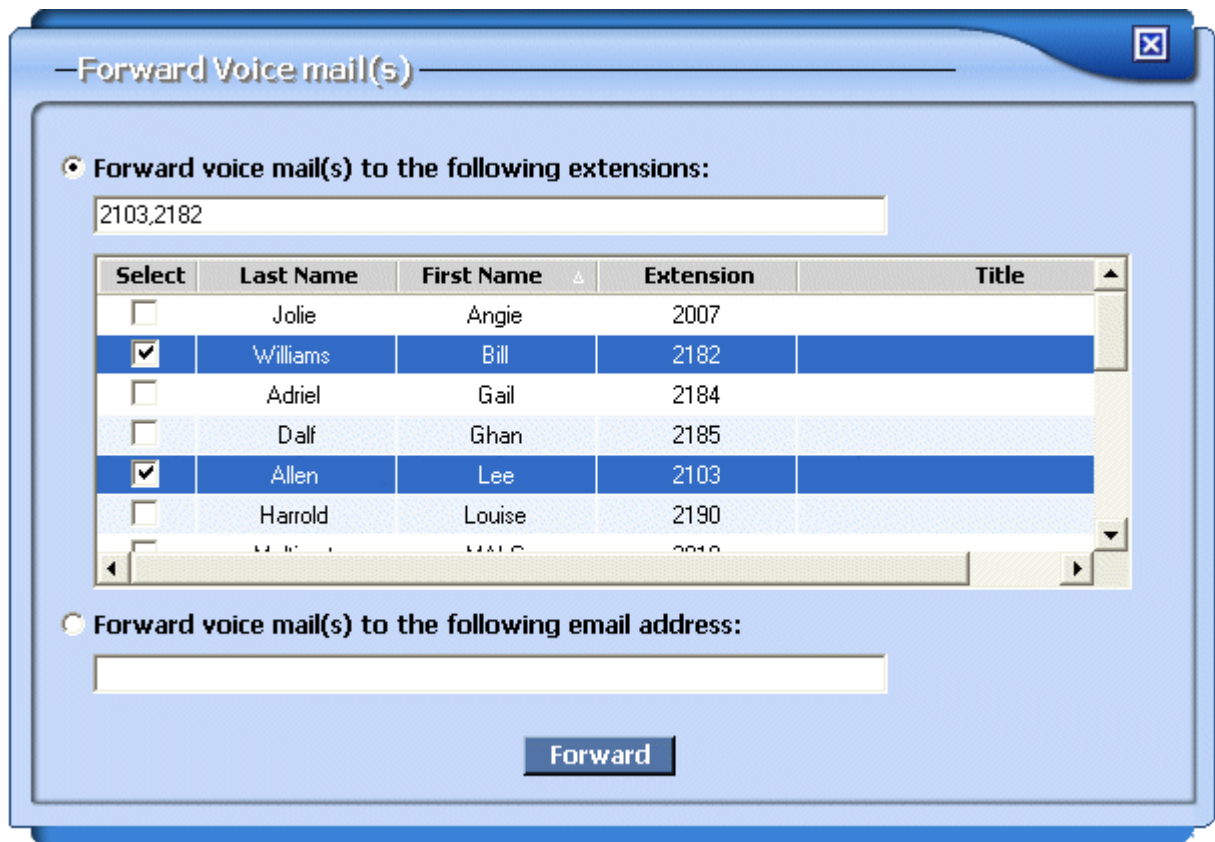
Phones	Play		Pause	Stop	Rewind	Fast forward
	Select	Type	Name	Number	Time Received	Duration
2104						
2181	<input type="checkbox"/>		Lee Allen	2103	03/17/2006 16:01	00:08:00
Call log	<input type="checkbox"/>		Gail Adriel	2184	02/03/2006 09:18	00:06:00
VM Inbox (1)						
VM Saved						
2184						
Call log						
VM Inbox (2)						
VM Saved						

## Voice Mail Operations

You can perform the following operations on the VM Inbox and VM Saved lists:

- **Refresh** the list
- **Change Password** – you can modify the voice mail password for the user
- **Call** – dials the highlighted entry
- **Delete message** – deletes the selected message or messages. You will be prompted to confirm the deletion.
- **Save** – (only on the VM Inbox list) saves the voice mail and moves it to the VM Saved list
- **Forward** – brings up a dialog that allows you to either
  - choose one or more numbers from the directory to send the voice mail to or
  - specify an email account to forward the voice mail to.

Figure 35: Voice Mail Forward Dialog







## Listening to Voice Mail


You can listen to a voice mail by doing the following:

1. Click on the desired entry in the list. The entry will turn blue.
2. Click **Play** at the top of the list to playback the voice mail on your PC.
3. While a message is playing, you can click the following:
  - **Pause** – to temporarily suspend playback
  - **Stop** – to stop playback
  - **Rewind** – to restart the message playback
  - **Fast Forward** – to fast forward to a part of the message, then continue playback

## Customizing the VM/Logs

The QuickDial panel can be customized by clicking on the buttons in the top right corner.

Button	Description
	Close – Closes the VM/Logs panel. Click on the <b>VM/Logs</b> button  to open the panel again.
	Collapse – click to minimize (shrink) the panel to just show the tab.
	Expand – click to expand the panel to full size again.

You can customize many features on the VM/Logs panel by clicking the **Options** button  in the upper right corner of the Console Assistant.


For details on customizing the VM/Logs Panel, please refer to [“Customizable Options” on page 49](#).



---

# Customizable Options

# 7


The Console Assistant has many configurable options to allow you to customize the application to suit your needs. To access these options, click on the Options button  in the top right corner of the application.

The dialog that appears has several tabs of configurable items. You can make multiple modifications before clicking on **OK** to set the desired features.

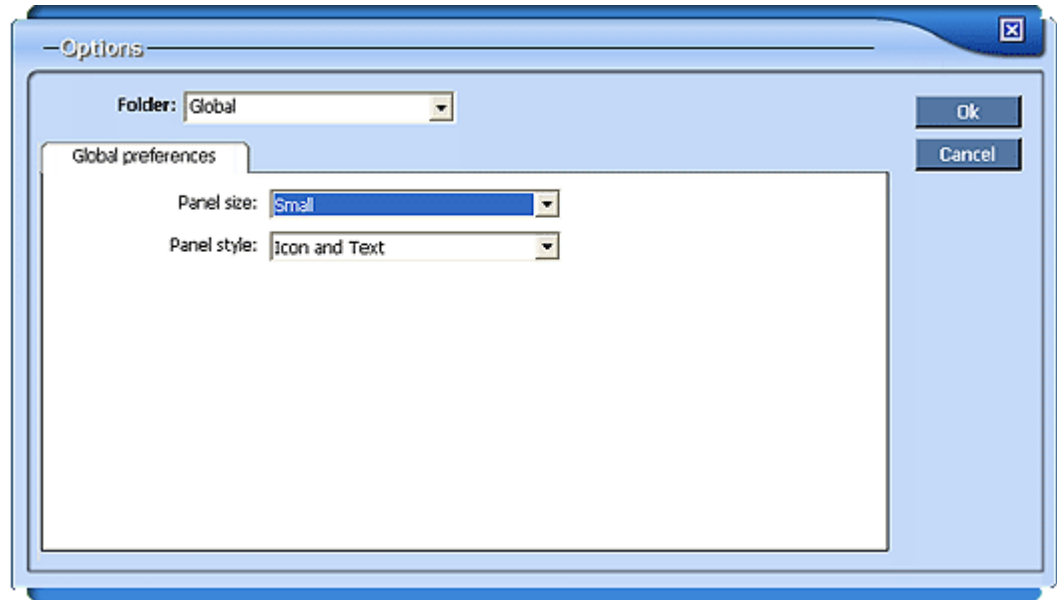
### ***In this section:***

- ✓ [“Global Options” on page 50](#)
- ✓ [“Call Control Options” on page 50](#)
- ✓ [“Phones Options” on page 56](#)
- ✓ [“Directory Options” on page 60](#)
- ✓ [“QuickDial Options” on page 61](#)
- ✓ [“VM/Logs Options” on page 63](#)

## Global Options

When you click the Options button  in the top right corner of the application, the first page shows Global configuration. The Global Options page allows you to choose the size of each panel and the text or icons that are displayed on the application.

**Figure 36: Global Options Dialog Box**



You may select the following:

- **Panel size** – the panels may be displayed as Small, Medium, Large or Extra Large. This setting changes the text size, icon sizes, and row sizes. Try different settings to see which is more comfortable.
- **Panel style** – The panel controls show an icon as well as text by default. You can modify the view to show Icon and Text (default), Icon Only, Icon Only (larger), or Text Only.

## Call Control Options

When you click the Options button  in the top right corner of the application, use the *Folder* pull-down list to select **Call Control**. The dialog has several tabs, which are described in the following sections:

- [“Call Options” on page 51](#)
- [“Call Control Confirm” on page 52](#)
- [“Greetings” on page 53](#)
- [“Virtual Ring” on page 53](#)
- [“Camped Calls” on page 54](#)

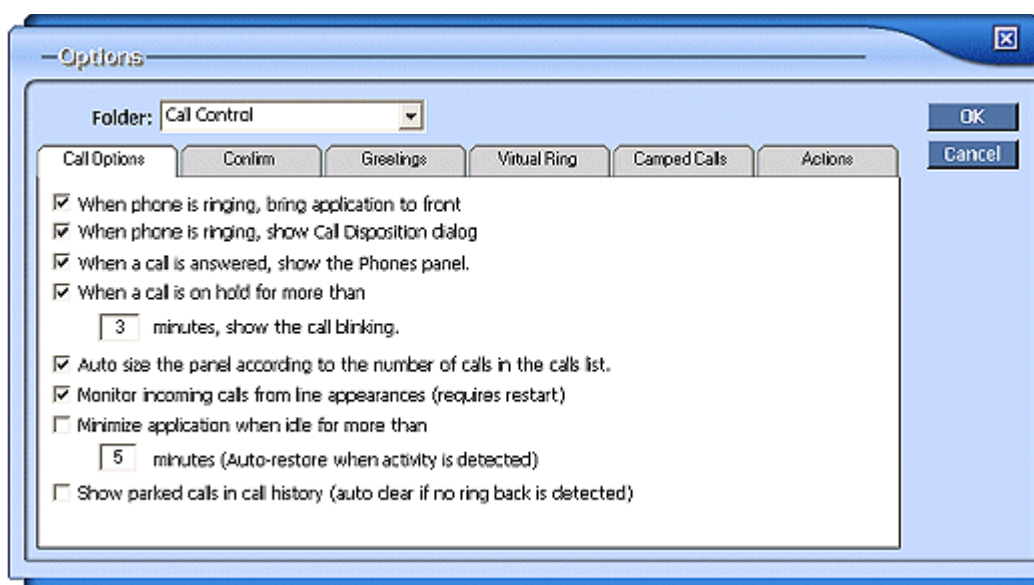


- [“Call Control Actions” on page 55](#)

## Call Options

The *Call Options* tab of the Call Control Options allows you to set many of the behaviors related to answering calls.

**Figure 37: Call Control Options - Call Options Tab**



The following features can be configured on this tab.

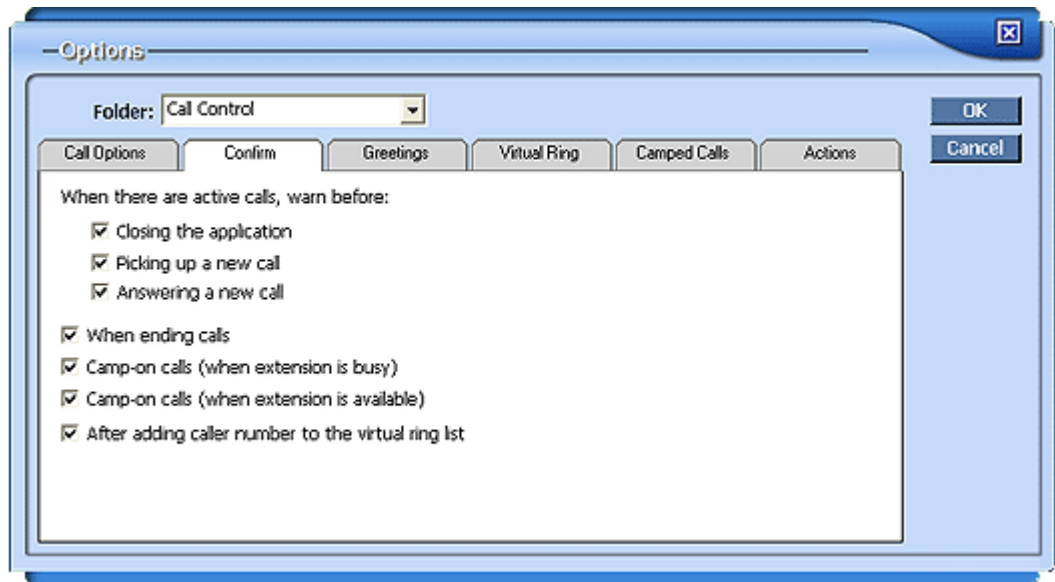
- **When phone is ringing, bring application to front** – when there is an incoming call to the Console Assistant phone, if this is checked, the Console Assistant appears in front of all other currently open windows on the computer.
- **When phone is ringing, show Call Disposition dialog** – when there is an incoming call to the Console Assistant phone, the Call Disposition Pop-up window is presented, as shown in [Figure 8 on page 14](#). Refer to [“Call Disposition Pop-up” on page 14](#) for more information.
- **When a call is answered, show the Phones panel** – the Phones panel will be expanded (if minimized) when you answer an incoming call. Also, the focus will change from the Call Control panel to the Phones panel.
- **When a call is on hold for more than X minutes, show call blinking** – this causes any call you have placed on hold to start blinking when the call has been held for the number of minutes you enter in the text box. The default is 3 minutes. The possible range is 0-99 minutes.
- **Auto size the panel according to the number of calls in the calls list** – when enabled, this setting causes the Call Control panel to expand to fit all of the current calls.

- **Monitor incoming calls from line appearances (requires restart)** – if you have a different line appearance on your phone, when this is enabled you will be able to monitor incoming calls from that line. If you change the setting, you must restart the Console Assistant application.
- **Minimize application when idle for more than X minutes** – specifies a number of minutes to wait after the PC becomes idle before minimizing the application to the tool bar. The application will automatically be maximized again when activity (such as mouse movement or keyboard entry) is detected.
- **Show parked calls in call history (auto clear if no ring back detected)** – causes parked calls to be listed in the Call Control panel. After one minute, the call will ring again as an incoming call. If desired, you can clear all parked calls from the list using the **Clear parked** button.

## Call Control Confirm

The *Confirm* tab of the Call Control Options allows you to enable or disable various confirmation prompts that pop up when you do certain operations.

**Figure 38: Call Control Options - Confirm Tab**



Click the checkboxes to check (enable) or uncheck (disable) a warning confirmation pop-up in the following situations:

- When there are active calls, warn before:
  - closing the application
  - picking up a call
  - answering a call
- when ending calls
- when camped on a call because the phone was busy

- when camped on a call when the phone becomes available
- after adding a caller to the virtual ring list

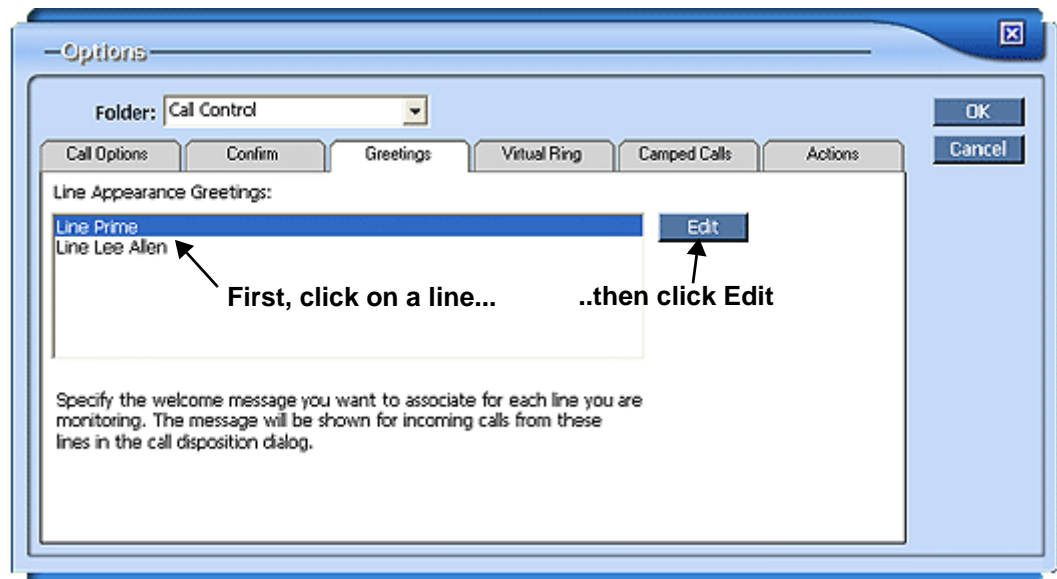
## Greetings

The *Greetings* tab of the Call Control Options allows you to set many of the behaviors related to answering calls.

You can select the lines listed and click the **Edit** button to enter a text string that will appear in the [“Call Disposition Pop-up” on page 14](#) (shown in Figure 8 on page 14) when a call is coming in on that line.

**Example:** If a temporary worker is answering the phones, you could enter a script for them to use such as, “Hello! Thank you for calling XYZ Company. How may I help you?”

**Figure 39: Call Control Options - Greetings Tab**



## Virtual Ring

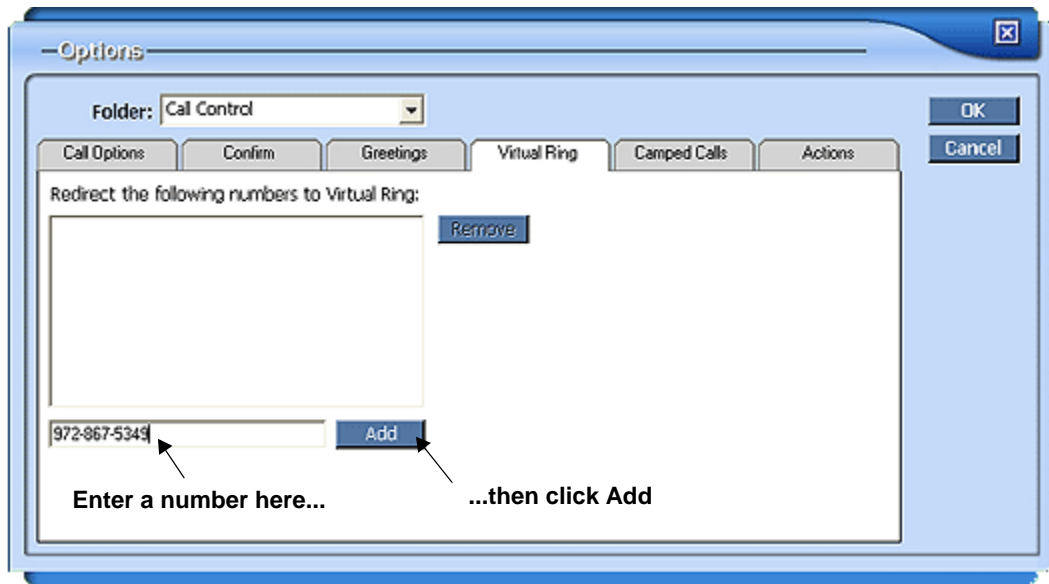
The *Virtual Ring* tab of the Call Control Options allows you to specify phone numbers that you want to go directly to virtual ring (the phone will not ring and the caller will not be sent to voice mail).

---

**NOTE:** Adding numbers to the Virtual Ring list in Console Assistant does not update your Web Portal settings.

---

Figure 40: Call Control Options - Virtual Ring Tab

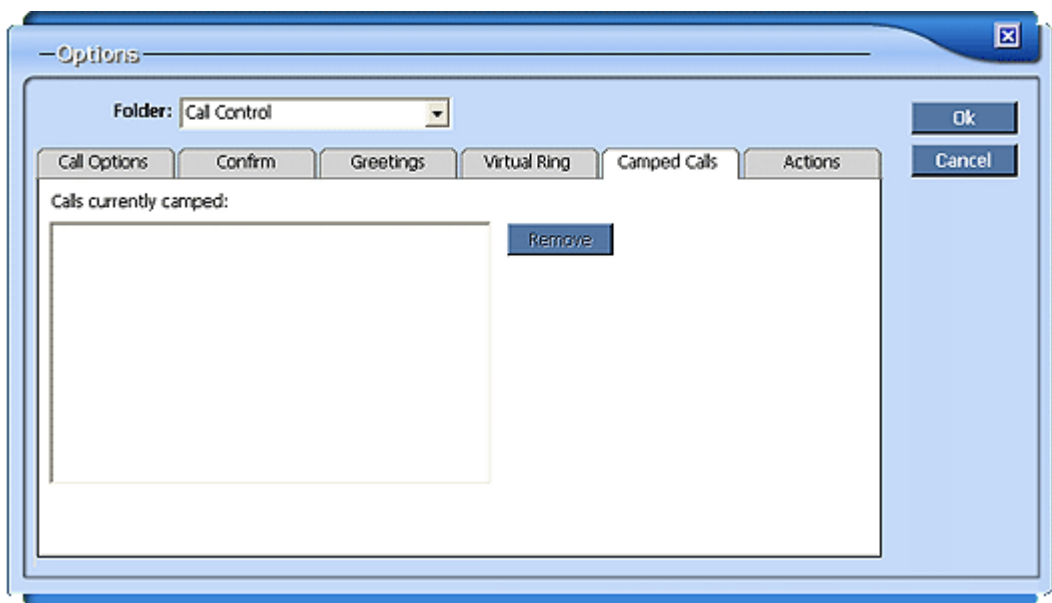


To add a number to the list, enter the number in the text bar on the bottom left, and then click **Add**. To remove a number from the list, click to select the number in the list and click **Remove**.

## Camped Calls

The *Camped Calls* tab of the Call Control Options shows all calls that your phone is currently camped on (waiting for the line to become available so that you can call that line). You can remove any or all of the camp-ons by clicking on the entries and clicking the **Remove** button.

Figure 41: Call Control Options - Camped Calls Tab

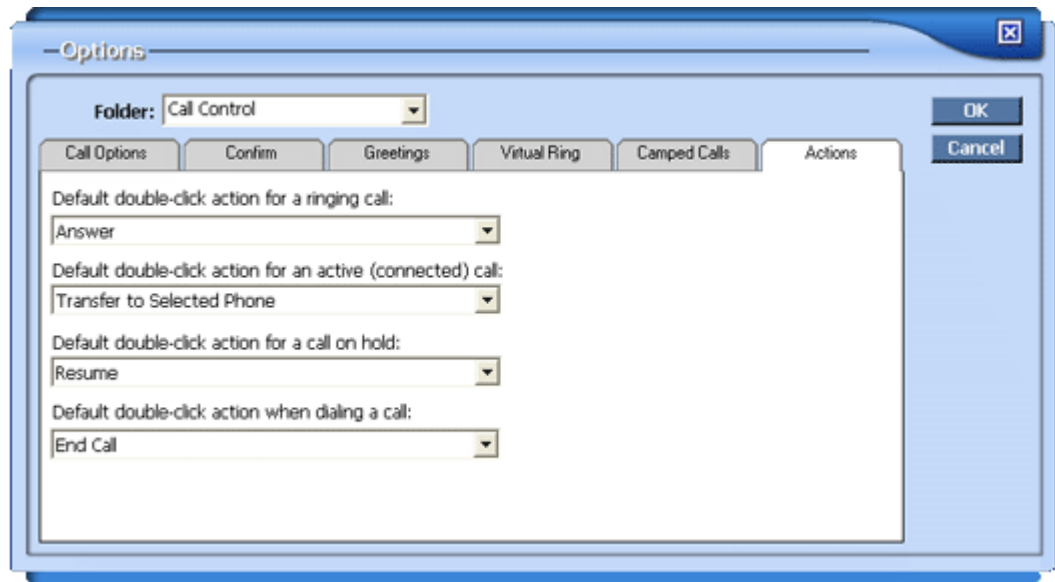


## Call Control Actions

The *Actions* tab of the Call Control Options allows you to set the default behaviors when you double-click on entries in the Call Control panel.

Figure 42 shows the settings that are most commonly used for each call condition. There are several choices for each of the call conditions.

**Figure 42: Call Control Options - Actions Tab**




The default double-click action can be set to the following:

- **Default double-click action for a ringing call:**
  - **None** – double-click is disabled.
  - **Answer** – (Default) answers the call.
  - **Hold** – answers the call and places it on hold.
  - **Redirect** – pops up a window that allows you to enter a number where the call can be redirected.
- **Default double-click action for an active (connected) call:**
  - **None** – double-click is disabled.
  - **Transfer to any** – pops up a dialog that allows you to enter a number where you wish to instantly transfer the call.
  - **Transfer to selected phone** – (Default) immediately transfers the call to the phone that you have highlighted in the *Phones* list. You will not need to speak to the party that the call is transferring to.
  - **Edit call notes** – pops up a window that allows you to enter notes about that call.
- **Default double-click action for a call on hold:**
  - **None** – double-click is disabled.

- **Resume** – (Default) resumes the call.
- **Edit call notes** – pops up a window that allows you to enter notes about that call.
- **Default double-click action when dialing a call:**
  - **None** – double-click is disabled.
  - **End call** – (Default) disconnects the call.

## Phones Options

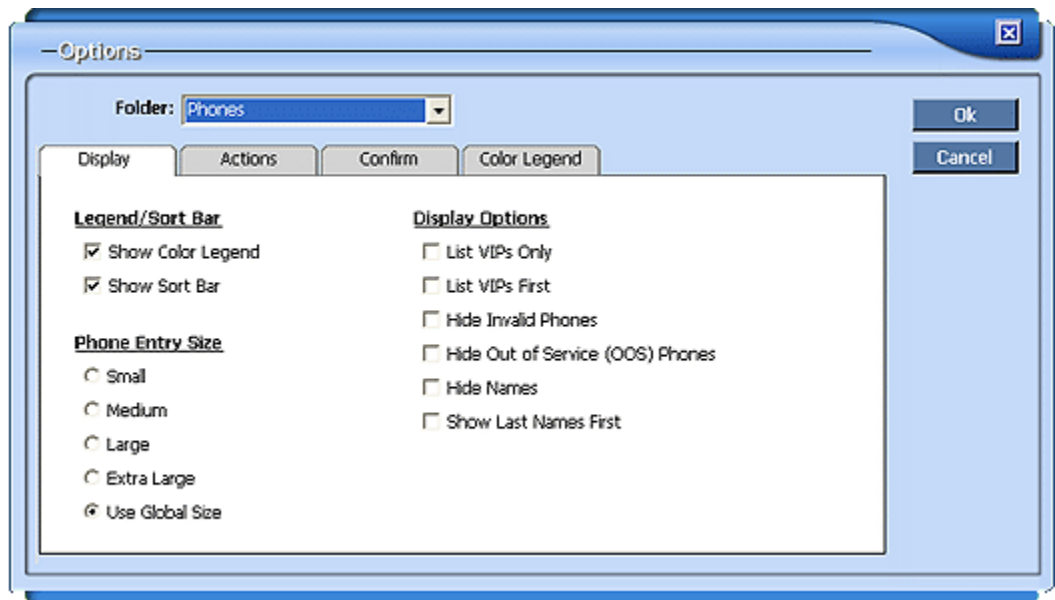
When you click the Options button  in the top right corner of the application, use the *Folder* pull-down list to select **Phones**. The dialog has several tabs, which are described in the following sections:

- [“Phones Display” on page 56](#)
- [“Phones Actions” on page 57](#)
- [“Phones Confirm” on page 59](#)
- [“Color Legend” on page 59](#)

## Phones Display

The *Display* tab of the Phones Options allows you to configure various features that aid in viewing and using the Phones panel. All of the settings on this dialog are also available from the pull-down menu on the Phones panel.

Figure 43: Phones Options - Display Tab



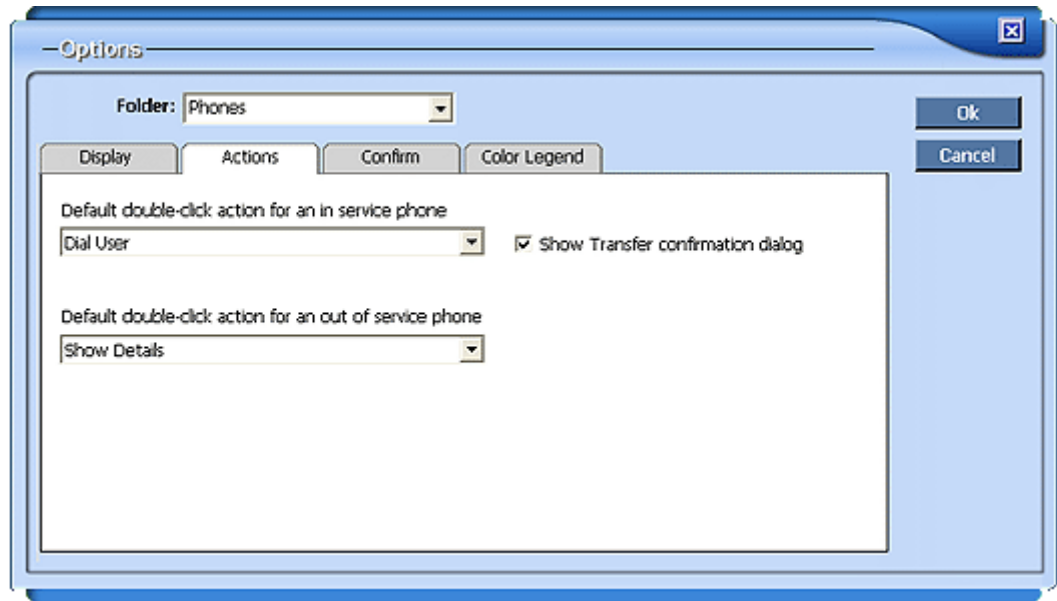
- **Legend/Sort Bar**

- **Show Color Legend** – check to display the color legend along the bottom row of the Phones panel; uncheck to disable.
- **Show Sort Bar** – check to display the Sort Bar along the top of the Phones panel; uncheck to disable.
- **Phone Entry Size**
  - **Small** – sets the entries to the smallest font.
  - **Medium** – sets the entries to a medium-sized font.
  - **Large** – sets the entries to a medium-sized font.
  - **Extra Large** – sets the entries to a medium-sized font.
  - **Use Global Size** – (default) sets the entries to match the setting in the Options > Global configuration dialog.
- **Display Options** (also available on pull-down menu on the panel)
  - **List VIPs Only** – will list only those entries in the Phones list that have been marked as “VIP.”
  - **List VIPs First** – will show all the entries that you have marked as “VIP” first before any other entries in the Phones panel. The other entries will be sorted in alphabetical order.
  - **Hide Invalid Phones** – eliminates all phones from the list that are “Invalid”. These are phones that have been deleted from the system database because the user has been deleted. You must remove these phones physically from the Phones panel, but they will automatically be removed from the Directory panel 30 minutes after the deletion.
  - **Hide Out of Service (OOS) Phones** – this will hide any out-of-service phones from your Phones list. When the phone goes in-service again, it will be displayed in the list.
  - **Hide Names** – When this checked, only the extensions will be displayed for each phone.
  - **Show Last Name First** – When checked, this displays the entries in the list by last name first, then first name.

## Phones Actions

The *Actions* tab of the Phones Options allows you to configure the actions that will take place when you double-click on entries in the list.

Figure 44: Phones Options - Actions Tab



- **Default double-click action for an in service phone** – pull-down list allows you to set the default behavior when you double-click on an entry in the Directory that has an associated extension.
  - **Show Details** – pops up a read-only dialog with phone details
  - **Remove Phone** – removes selected phone from list
  - **Dial User** (default) – dials selected phone
  - **Immediate Transfer** – transfers the selected active call in the Call Control panel to the selected phone in the Phones list without notifying the receiver of the transfer.
  - **Supervised Transfer** – allows you to call and speak to the receiver of the transfer before you transfer the selected active call in the Call Control panel to the selected phone in the Phones list.
  - **Intercom Transfer** – allows you to notify the receiver of the transfer by intercom (via speakerphone) before you transfer the selected active call in the Call Control panel to the selected phone in the Phones list.
  - **Voice Mail Transfer** – transfers the call to the voice mail account of the selected phone.
  - **Show Transfer confirmation dialog** – when checked (default), it will display the confirmation dialog allowing you to select immediate transfer, supervised transfer, etc. When unchecked, the action that you have selected in the drop-down list will occur without further confirmation.
- **Default double-click action for an out of service phone** – pull-down list allows you to set the default behavior when you double-click on an entry in the Directory that does not have an associated extension.
  - **Show Details** (default)

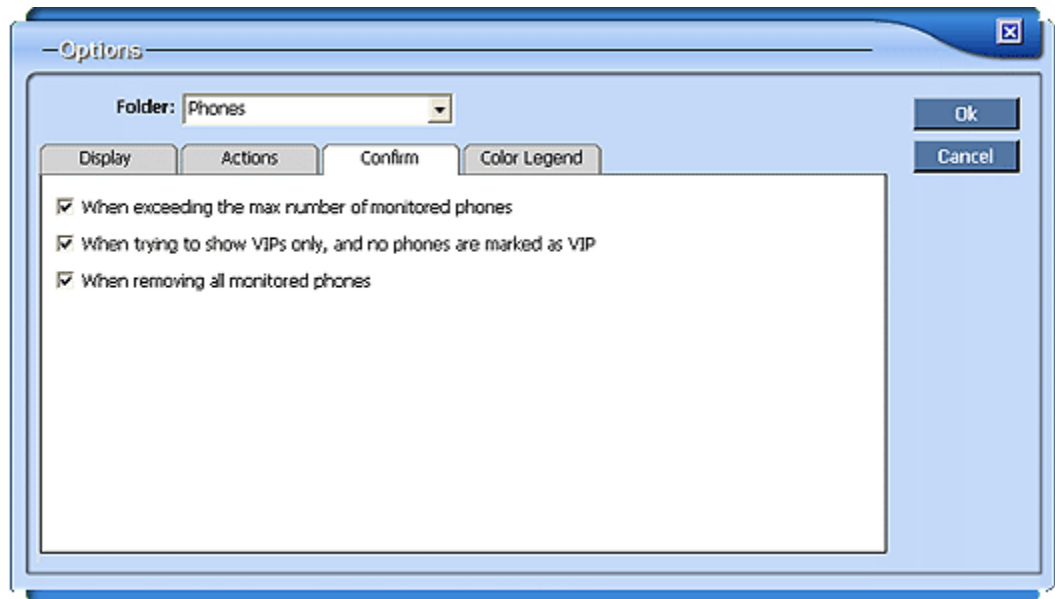


- **Remove Phone**

## Phones Confirm

The *Confirm* tab of the Phones Options allows you to enable or disable various confirmation prompts that pop up when you perform certain operations.

**Figure 45: Phones Options - Confirm Tab**




The following warning prompts can be enabled:

- **When exceeding the max number of monitored phones** – when checked, this causes a warning message to pop up if you try to add another phone to the monitored *Phones* list, but the max number allowed has been exceeded.
- **When trying to show VIPs only, and no phones are marked as VIP** – when checked, this causes a warning to pop up when you try to show only the phones marked as VIP, but there are none.
- **When removing all monitored phones** – when checked, this causes a warning to pop up when you highlight all of the phones in the list and click **Remove Phones**.

## Color Legend

The *Color Legend* tab of the Phones Options displays a key to the colors and indicators that are used in the Phones panel. See [“Phones List Colors - At a Glance” on page 22](#).

## Directory Options

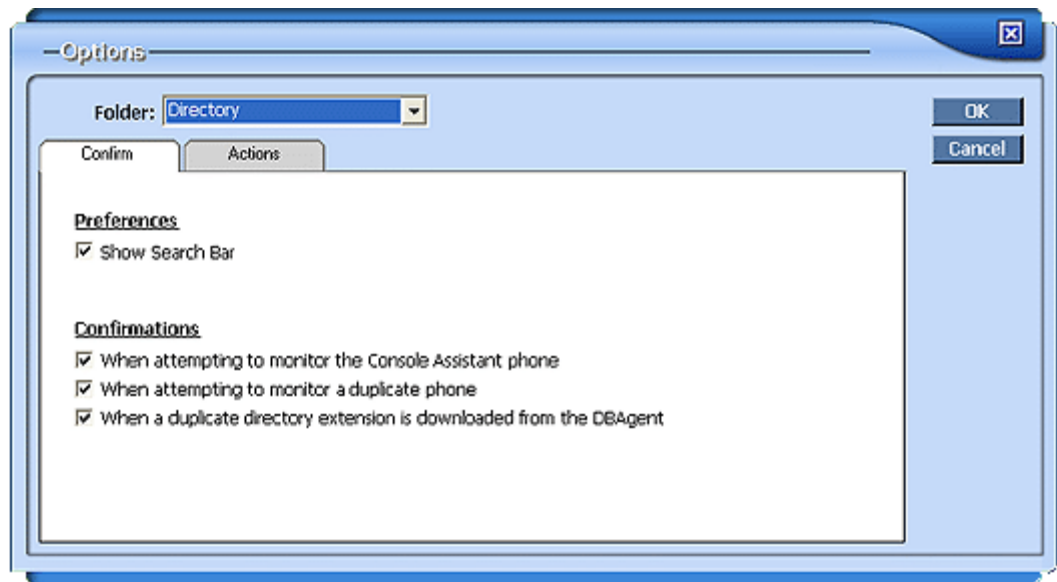
When you click the Options button  in the top right corner of the application, use the *Folder* pull-down list to select **Directory**. The dialog has several tabs, which are described in the following sections:

- [“Directory Confirm” on page 60](#)
- [“Directory Actions” on page 61](#)

### Directory Confirm

The *Confirm* tab of the Directory Options allows you to enable or disable various confirmation prompts that pop up when you perform certain operations.

Figure 46: Directory Options - Confirm Tab



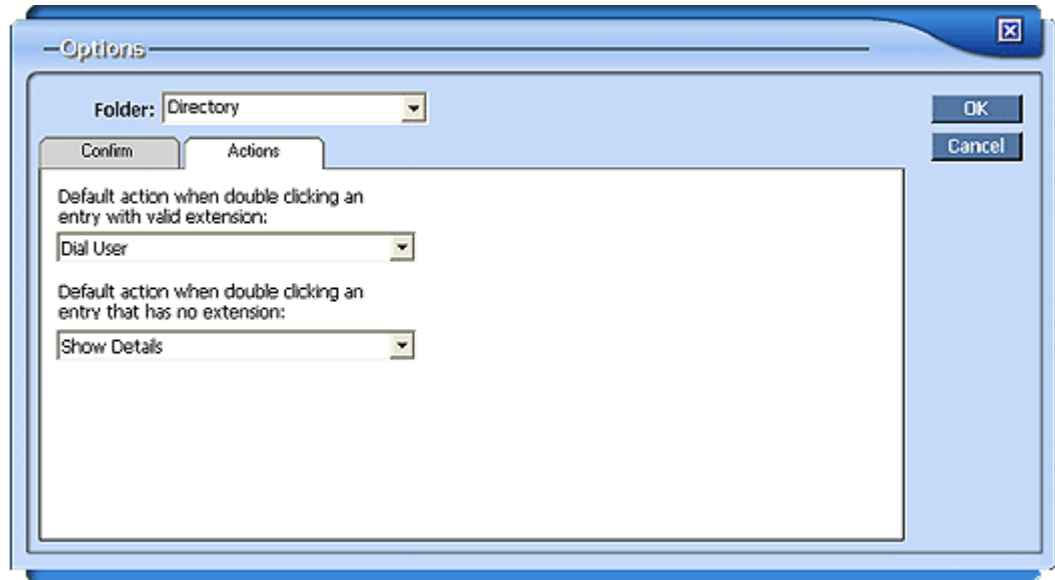
The following warning prompts can be enabled:

- **Confirmations**
  - **When attempting to monitor Console Assistant phone** – when checked, this causes a warning message to pop up if you try to add the Console Assistant phone to the monitored *Phones* list.
  - **When attempting to monitor duplicate phone** – when checked, this causes a warning to pop up when you try to add a phone to the *Phones* list that has already been added.
  - **When a duplicate directory extension is downloaded from the DBAgent** – when checked, this causes a warning to pop up when a duplicate entry has been downloaded from the main system phone Directory. If you see this message, notify your system administrator so that they can investigate the duplicates in the Directory.

## Directory Actions

The *Actions* tab of the Directory Options allows you to configure the actions that will take place when you double-click on entries in the list.

Figure 47: Directory Options - Actions Tab



- **Default Action when double-clicking an entry with valid extension** – pull-down list allows you to set the default behavior when you double-click on an entry in the Directory that has an associated extension. By default, it is set to **Dial User**. Other choices are **Show Details**, **Modify Entry**, **Add to Phones (Monitor)**, and **Add to VoiceMail (Monitor)**.
- **Default Action for when double-clicking an entry that has no extension** – pull-down list allows you to set the default behavior when you double-click on an entry in the Directory that does not have an associated extension. By default, it is set to **Show Details**. Other choices are **Show Details** or **Modify Entry**.

## QuickDial Options

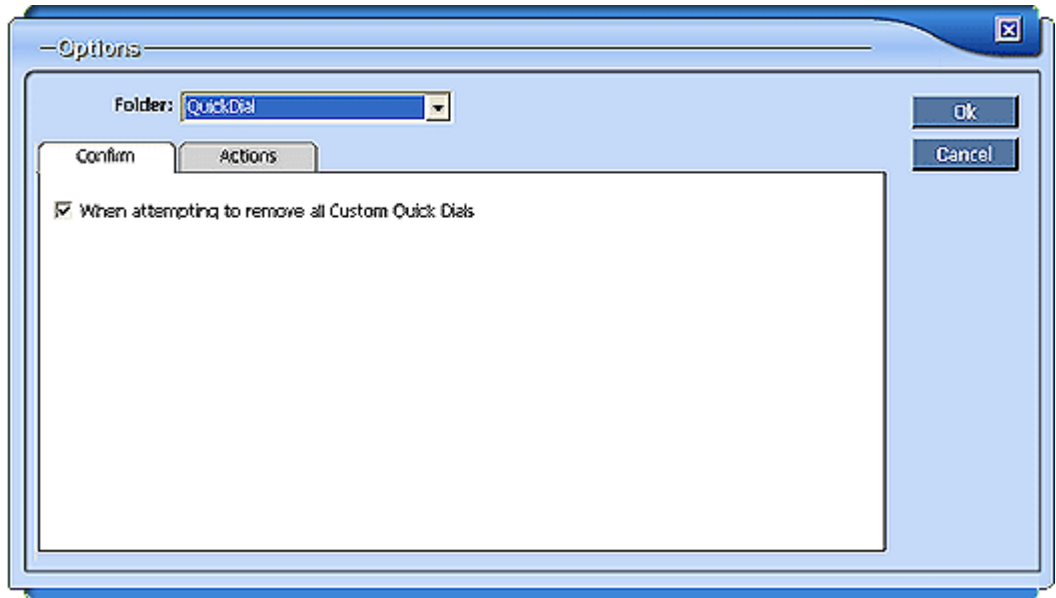
When you click the Options button  in the top right corner of the application, use the *Folder* pull-down list to select **QuickDial**. The dialog has several tabs, which are described in the following sections:

- [“QuickDial Confirm” on page 62](#)
- [“QuickDial Actions” on page 62](#)

## QuickDial Confirm

The *Confirm* tab of the QuickDial Options allows you to enable or disable a confirmation prompt when attempting to remove all Custom Quick Dials.

Figure 48: QuickDial Options - Confirm Tab



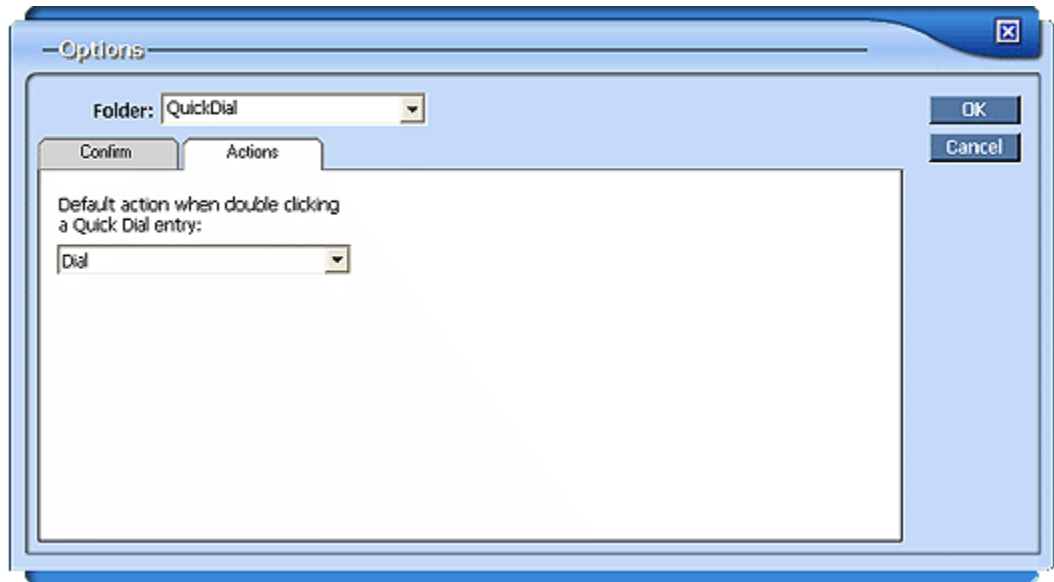
## QuickDial Actions

The *Actions* tab of the QuickDial Options allows you to configure the default action when you double-click on an entry in the *Custom QuickDial* list.


By pulling down the drop-down list, you can set the double-click action to one of the following:

- **Dial** the number (default)
- **Edit** the Custom QuickDial entry
- **Remove** the entry

Figure 49: QuickDial Options - Actions Tab



## VM/Logs Options

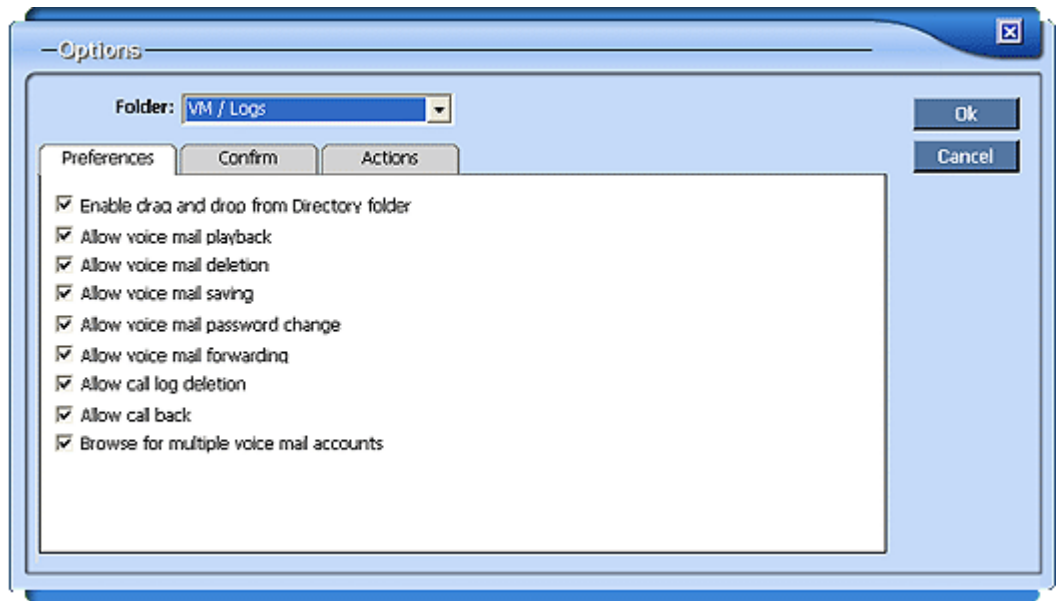
When you click the Options button  in the top right corner of the application, use the *Folder* pull-down list to select **VM / Logs**. The dialog has several tabs, which are described in the following sections:

- [“VM/Logs Preferences” on page 63](#)
- [“VM/Logs Confirm” on page 64](#)
- [“VM/Logs Actions” on page 65](#)

## VM/Logs Preferences

The *Preferences* tab of the VM/Logs Options allows you to configure several preferences for the *VM/Logs* list.

Figure 50: VM/Logs Options - Preferences Tab

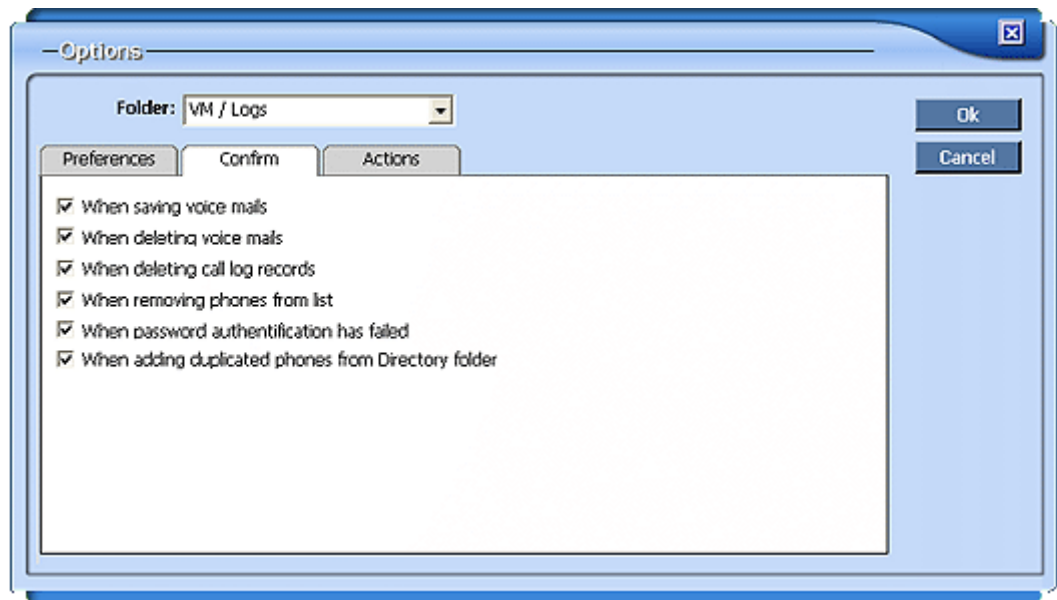


- **Enable drag and drop from Directory folder** – enabled by default, this feature lets you click on and drag an entry from the Directory to the VM/Logs list.
- **Allow voice mail playback** – allows you to listen to your voice mail on the PC.
- **Allow voice mail deletion**
- **Allow voice mail saving**
- **Allow voice mail password change**
- **Allow voice mail forwarding**
- **Allow call log deletion** – enables the ability to delete call log entries
- **Allow call back** – when disabled, restricts the ability to click and dial from the call logs or the voice mail log list
- **Browse for multiple voice mail accounts** – causes Console Assistant to look for more than one voice mail account for a number. When this is enabled, all of the available voice mail accounts for each user will be listed.

## VM/Logs Confirm

The *Confirm* tab of the VM/Logs Options allows you to enable or disable various confirmation prompts that pop up when you do certain operations

Figure 51: VM/Logs Options - Confirm Tab



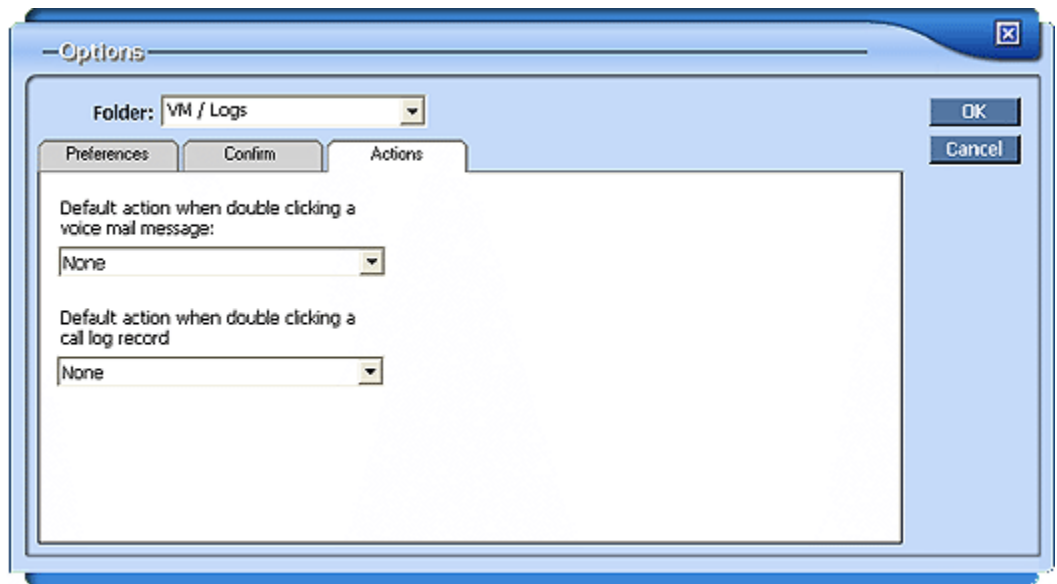
The following warning prompts can be enabled:

- **When saving voice mails**
- **When deleting voice mails**
- **When deleting call log records**
- **When removing phones from list** – pertains only to phones in the VM/Logs list.
- **When password authentication has failed**
- **When adding duplicated phones from Directory folder** – prompts you that you have already added that phone to the VM/Logs panel.

## VM/Logs Actions

The *Actions* tab of the VM/Logs Options allows you to configure the default action when you double-click on an entry in call log.

Figure 52: VM/Logs Options - Actions Tab



You can choose default actions when you double-click on a voice mail:

- **None** (default)
- **Call back**
- **Play**
- **Save**
- **Delete**

You can also choose default actions when you double-click on a call log record:

- **None** (default)
- **Call back**



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