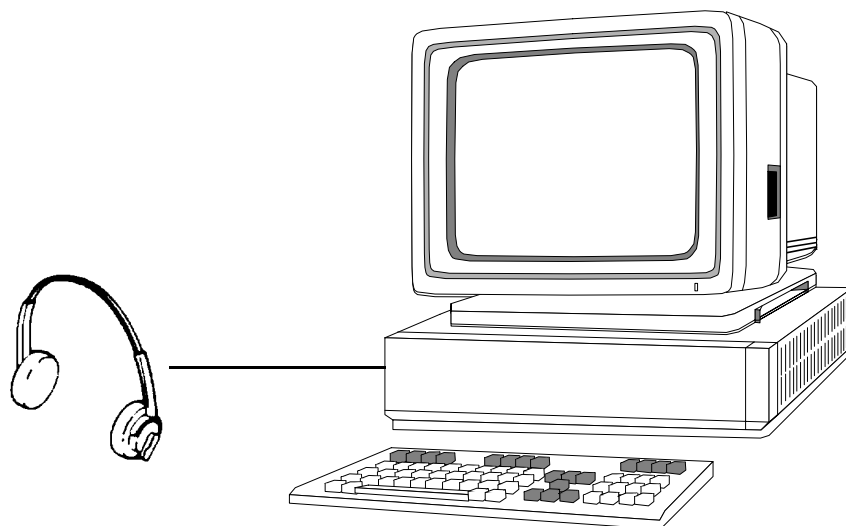


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# NEC

## EliteApps PC Attendant



### User's Guide



# EliteApps PC Attendant Operation

## What is EliteApps PC Attendant?

Congratulations on your purchase of the new NEC EliteApps PC Attendant. The EliteApps PC Attendant provides easy access to the most common functions required by an operator or receptionist. By using this application, the attendant can easily manage their call handling tasks without having to switch their attention between the telephone and the PC. Additional features, such as a company directory, recording capability, and PC-to-PC messaging, provide additional value to the NEC attendant position.

The EliteApps PC Attendant has three main components:

1. EliteApps PC Attendant Application Software:  
This application runs on a PC and provides the PC based GUI (Graphical User Interface) and features.
2. CTU Adapter:  
The adapter is installed on the multiline telephone and interfaces the Electra Elite KSU with the USB (Universal Serial Bus) port on the PC.
3. Headset: (optional)  
A headset can be plugged into the multiline telephone and used when making or receiving calls with the EliteApps PC Attendant.

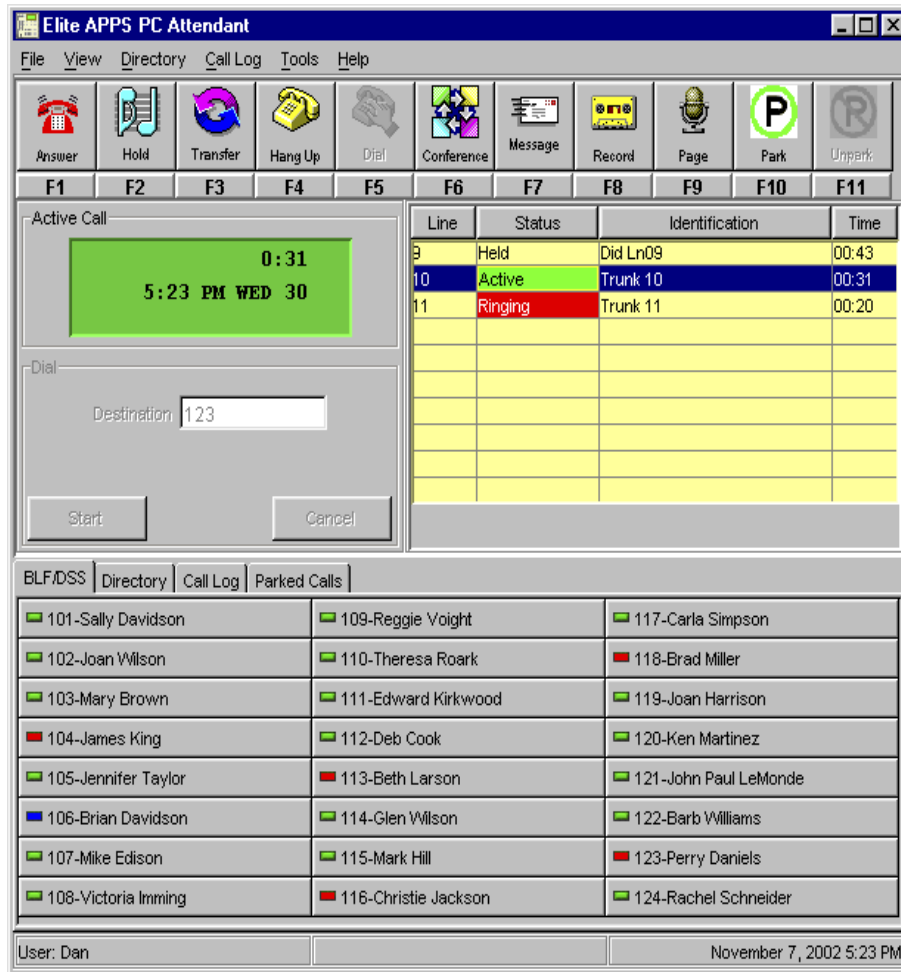
The EliteApps PC Attendant runs on the PC and communicates with the Electra Elite through a normal digital station port using the CTU Adapter that is attached to the telephone. When a call comes into this station, EliteApps PC Attendant displays it on the PC and provides several features, which allow the user to handle the call quickly. EliteApps PC Attendant can be minimized to run in the background and pop to the front when call activity occurs. Calls can then be handled using either the keyboard or the mouse. The attendant speaks to the caller through the telephone handset, headset, or speakerphone.

## General Information

This guide describes the basic operations of the EliteApps PC Attendant. Additional information about the product feature set can be found within the on-line help system.

# EliteApps PC Attendant Main Screen

The main screen of the EliteApps PC Attendant presents valuable information about the current call activity and provides easy access to the basic operations required by the attendant. Using either the mouse or keyboard, the user can quickly move between the different areas of the screen to dispatch callers, search the company directory, and view the status of the individual lines.



## Title Bar and Main Menu

The Title Bar and Main Menu provide the standard window controls and access to basic operations and utilities through pull-down menus

The standard window controls are displayed as icons on the right side of the Title Bar. These include the options to *Minimize*, *Maximize/Restore*, or *Close* the main window.

The Main Menu provides a series of drop-down menus, which lists all of the functions available within a selected category. The functions available from the Main Menu are as follows:

### File

Exit - Close the EliteApps PC Attendant application.

## **View**

Active Call List - Change the focus to the Active Call list to allow keyboard access to the active calls.

BLF/DSS Tab - Display the BLF/DSS tab.

Directory Tab - Display the Directory tab.

Call Log Tab - Display the Call Log tab.

Parked Calls Tab - Display the Parked Calls tab.

## **Directory**

New Entry - Add a new record in the company directory.

Edit Entry - Modify the fields within a directory entry.

Delete Entry - Erase a record from the company directory.

Search - Access the search function for the company directory.

Print - Print all or part of the company directory.

## **Call Log**

Dial - Redial a number within a call log record.

Play - Replay a recording from within a call log record.

Delete - Erase a record from the call log.

E-Mail - Send a call log record using the default e-mail client.

Print - Print all or part of the call log.

Archive - Save all or part of the call log to a designated file.

## **Tools**

Personal Greeting - Select a personal greeting to be played for incoming calls.

User Administration - Add or Delete a user from the EliteApps PC Attendant access list.

Call Forward - Set or cancel call forwarding on the attendant console.

Night Mode - Set or cancel night mode from the attendant console.

Preferences - Customize operational settings for the EliteApps PC Attendant.

Setup Dialing Options - Define dialing patterns to be used when making outbound calls.

Telephony Configuration - Access the configuration settings for your telephony device.

## Help

Contents and Index - Access the on-line help system by topic.

About - View the copyright notice and current revision of the software.

## Function Toolbar

The Function Toolbar provides quick access to the most commonly used call processing and attendant functions. A function on the toolbar can be selected by using the mouse to click on the desired function button or pressing the associated Function Key (F1 - F11) on the keyboard. If additional information is required to complete the operation, then the Data Entry Area will become active and request further input from the attendant.

Individual buttons on the Function Toolbar become disabled if the function is not allowed for the current state of the attendant console. For example, the Answer button is only enabled when a call is ringing into the attendant position.

The functions available on the Function Toolbar are described as follows.



Answer an incoming call



Place the current active call on hold.



Transfer the current active call.



Disconnect the current active call.



Initiate an outbound call from the console.



Initiate a conference call, which includes the active call.



Send a Quick Message to another user's PC.



Start/stop recording of the current call.



Initiate a page using the telephone's paging system.



Transfer the active call to a park location.

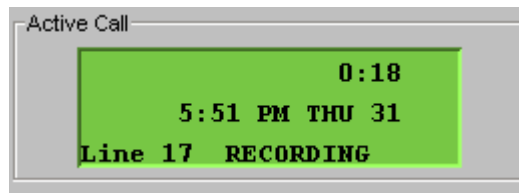


Retrieve a call from a designated park location.



## Active Call Display

The Active Call Display simulates the three-line display on an NEC digital telephone.



The top and middle lines of this display area show exactly the same information that is typically provided on the telephone's display. This data includes information about the current call, such as the caller's name and telephone number (when Calling Line ID is available), the current time and date, and the amount of time that the current call has been active. The EliteApps PC Attendant application uses the bottom line of the Active Call Display area to show additional information about the active call, such as the current active line and recording status.

# Active Call List

The Active Call List displays all of the calls that are currently being handled by the attendant. The list includes the active call, held calls, and ringing calls. The Active Call List also provides information about Quick Messages that have been sent by the attendant and their responses.


Line	Status	Identification	Time
9	Held	Did Ln09	00:35
	➔ Message	Perry Daniels: Someone is on ...	00:02
	➔ Response	Take Msg	00:54
10	Active	Trunk 10	01:45
11	Ringing	Trunk 11	00:05

The columns within the Active Call List are defined as follows.

Line	The line number on the attendant console where the call resides
Status	The current status of the call. Possible call states are Ringing, Held, and Active. Additionally, Quick Message entries will have the status of either Message or Response
Identification	For call records, the Identification field includes the Calling Line ID information (if available) or the trunk or line identification. For Quick Messages, the Identification field shows the name of the recipient, followed by the text message or response.
Time	A timer that shows the length of time the call has been in the current state. For a Quick Message, the timer indicates the elapsed time since the message was sent. A response to a Quick Message shows the elapsed time since the response was received..

## Data Entry Area

The Data Entry Area is used to complete telephone functions that are requested by the attendant. When the attendant selects a function from the Function Toolbar, the Data Entry Area is enabled, so that the attendant can provide further information about the requested function. The following figure shows the contents of the Data Entry Area, as it appears when a transfer has been initiated.



Transfer

Destination

Start Immediate Cancel

The functions that use the Data Entry Area are as follows: Transfer, Dial, Conference, Page, Park, and Unpark.

## BLF/DSS Tab

The Busy Lamp Field (BLF)/Direct Station Select (DSS) Tab provides functionality similar to an add-on module for the attendant console. Each key on the BLF/DSS Tab is used to monitor another station on the telephone system and provides one-touch access to that station. In addition to the basic add-on module functionality, the BLF/DSS Tab also provides access to e-mail and Quick Message and also allows names and/or extensions to be displayed for each key.

BLF/DSS	Directory	Call Log	Parked Calls
101-Sally Davidson			109-Reggie Voight
102-Joan Wilson			110-Theresa Roark
103-Mary Brown			111-Edward Kirkwood
104-James King			112-Deb Cook
105-Jennifer Taylor			113-Beth Larson
106-Brian Davidson			114-Glen Wilson
107-Mike Edison			115-Mark Hill
108-Victoria Imming			116-Christie Jackson

A green indicator on a BLF key signifies that the station is idle and can accept a call. When an indicator is red, the station is in use and cannot receive a call directly. The conditions which cause a station to be marked as in use include the telephone being offhook or the station being forwarded. The indicator is blue when the station has been set to do not disturb.

(Only local BLF keys will display a blue indicator for Do Not Disturb. The extended BLF keys will show Do Not Disturb with a red indicator.)

## Directory Tab

The Directory Tab displays all of the entries within the company directory. This view provides the attendant important information about each employee and allows individuals in the list to be selected to receive call transfers, e-mail, and Quick Messages. The Directory Tab also provides a convenient search capability that can be used to find individuals by first name, last name, or partial name.

Each entry in the Directory database can contain the following fields:

- First Name
- Last Name
- Extension
- E-mail address
- Location
- Title
- Supervisor Name
- Supervisor Telephone Number
- Assistant Name
- Assistant Telephone Number
- Department
- Alternate Contact Numbers

The columns within the Directory Tab can be resized and rearranged. To resize a column, place the mouse cursor within the header row, on the right hand edge of the column to be resized. Hold down the left mouse button and drag the edge of the column to the new size. To rearrange the order of the columns, place the mouse cursor within the header row of the column to be moved. Hold down the left mouse button and drag the column into the new position.

## Call Log Tab

The Call Log Tab provides a historical trace of the attendant's call activity. Each inbound and outbound call generates a record in the Call Log. This information can be used to retrieve details about specific calls that were handled by the attendant.

The columns within the Call Log Tab can be resized and rearranged. To resize a column, place the mouse cursor within the header row, on the right hand edge of the column to be resized. Hold down the left mouse button and drag the edge of the column to the new size. To rearrange the order of the columns, place the mouse cursor within the header row of the column to be moved. Hold down the left mouse button and drag the column into the new position.

## Parked Calls Tab

The Parked Calls Tab lists the telephone system's ten park locations and shows information about the last call parked by the attendant. This information serves as a reminder to the attendant regarding which calls have been parked and which employee the caller has requested.

Note: The Parked Calls Tab provides information about calls parked by the attendant, but does not represent the current state of each park location. The Parked Calls Tab is not updated when calls are retrieved by other users, when parked callers hang-up, or when other users transfer callers to a park location.

## Basic Call Handling

### Answering Incoming Calls

When a call arrives at the attendant position, the EliteApps PC Attendant generates a notification tone and adds a new Ringing entry to the Active Call List.

The attendant can answer the call using any of the following methods:

1. Use the mouse to select the Answer function on the Function Toolbar.  
-OR-
2. Press the F1 key on the keyboard.  
-OR-
3. Use the mouse to select the **Ringing** call entry within the **Active Call List**.

When an inbound call is answered, the state of the call will change from Ringing to Active on the

Active Call List. If the attendant has another active call when a ringing call is answered, the active call will automatically be placed on hold.

## Disconnecting a Call

To disconnect from the active call:

1. Use the mouse to select **Hang Up** from the **Function Toolbar**.
- OR-
2. Press the **F4** key on the keyboard.

When an active call is disconnected, the call entry will be removed from the Active Call List.

## Placing an Outbound Call

When the attendant console is idle (no active call), the user can initiate an outbound call. The EliteApps PC Attendant provides the Dial function to initiate a call to an external number and special dialing features for the BLF/DSS Tab and Directory Tab.

Placing a call using the Dial function

1. Use the mouse to select **Dial** on the **Function Toolbar**.
- OR-
2. Press the **F5** key on the keyboard.
3. Enter the number to be dialed in the **Destination** field within the **Data Entry** area.
4. Select the **Start** option within the **Data Entry** area to place the call.

Placing a call using the Directory

1. Within the **Directory Tab**, press the *right* mouse button to select the directory entry to be dialed.
- OR-
2. Use the arrow keys to highlight the directory entry to be dialed, and then press the **Enter** key.
3. From the pop-up menu, select the **Dial** option to place the call.

## Placing a Call On Hold

To place the active call on hold:

1. Use the mouse to select **Hold** on the **Function Toolbar**.

**-OR-**

2. Press the **F2** key on the keyboard.

When a call is placed on hold, the status of the call in the Active Call List will change from Active to Held.

## Retrieving a Call on Hold

To retrieve a call that was previously placed on hold:

1. Use the mouse to select the **Held** call within the **Active Call List**.

**-OR-**

2. Use the arrow keys to highlight the **Held** call on the **Active Call List** and press **Enter**.

When a held call is retrieved, the status of the call in the Active Call List will change from Held to Active. If another call is active on the attendant console when a held call is retrieved, the active call will automatically be placed on hold.

## Transferring a Call

The EliteApps PC Attendant provides several different methods to initiate a transfer on an active call. The Transfer function can be used to initiate a transfer to an external or internal number, while the BLF/DSS Tab and Directory Tab provide special features to initiate a transfer to an internal extension. The EliteApps PC Attendant also provides the option to perform either a supervised transfer or unsupervised (blind) transfer.

Redirecting a call with the Transfer function:

1. Use the mouse to select **Transfer** on the **Function Toolbar**.

**-OR-**

2. Press the **F3** key on the keyboard.
3. Enter the number to be dialed in the **Destination** field within the **Data Entry** area.

4. **[Supervised Transfer]** Select the **Start** option within the **Data Entry** area to initiate a supervised transfer. When the destination party answers, announce the transfer and then select **Complete** from the **Data Entry** area. If the destination does not answer or does not want to take the call, select **Disconnect** from the **Data Entry** area to reconnect to the original caller. If the destination is busy or does not answer, select **VoiceMail** to send the call to the destination voicemail box.

**-OR-**

5. **[Unsupervised Transfer]** Select the **Immediate** option within the **Data Entry** area to initiate an unsupervised (blind) transfer. The call will be immediately routed to the specified destination.

One touch transfers using a BLF/DSS key:

1. Within the **BLF/DSS Tab**, use the mouse to select the station to receive the call. When the one-touch transfer initiates a supervised transfer, the **Data Entry** area will become enabled. Select **Complete** within the **Data Entry** area to complete the transfer, **VoiceMail** to send the caller to the voicemail box, or **Disconnect** to reconnect to the original caller.

Note: The one-touch transfer initiated with a BLF/DSS key can be either supervised or unsupervised (blind). The type of transfer is determined by a setting in the BLF/DSS configuration screen. To change this setting, on the Tools menu, select Preferences. Then select the BLF/DSS tab and change the setting for One Touch Transfer.

Transferring a call to a directory entry:

1. Within the **Directory Tab** press the *right* mouse button to select the directory entry to receive the call.

**-OR-**

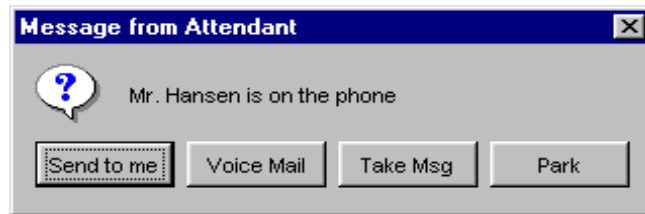
2. Use the arrow keys to highlight the entry to receive the call, and then press the **Enter** key.
3. From the pop-up menu, select either **Transfer - Immediate** or **Transfer - Supervised** to redirect the call.
4. If **Transfer - Supervised** is selected, the **Data Entry** area will become enabled. Select **Complete** within the **Data Entry** area to complete the transfer, **VoiceMail** to send the caller to the voicemail box, or **Disconnect** to reconnect to the original caller.



# Quick Message Utility

The Quick Message utility allows the attendant to send a short text message to another employee. Unlike an e-mail message, a Quick Message is delivered immediately to the destination and automatically displayed on the user's PC screen. The recipient can then quickly send a reply back to the attendant by selecting from a set of predefined responses. This tool is invaluable for delivering a message to someone who is on the phone or when the attendant needs an immediate response.

The attendant can easily select the text of the Quick Message from a pre-defined list of standard messages, or compose a short message from scratch. When the message is delivered to the recipient, the message text and standard responses are shown on the user's PC screen.



When the user selects a response, the reply is sent immediately back to the attendant. To assist the attendant in keeping track of Quick Messages, an entry is added to the Active Call List for each Quick Message and Response.

Further information about sending Quick Messages and customizing the pre-defined messages and responses can be found in the EliteApps PC Attendant online help system.

## **Additional Features**

The EliteApps PC Attendant provides several additional features that are designed to assist the attendant in their everyday tasks. These additional features include:

- Searching the company directory
- Dialing from the Call Log
- Recording the active call
- Playing a pre-recorded personal greeting to callers
- Forwarding the attendant console
- Setting the telephone system in Night Mode
- Customizing the layout of individual screen areas

Details on using these features are provided within the EliteApps PC Attendant online help system.

# NOTES

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