

Norstar PC Console 1.1 User Guide

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Norstar PC Console is an application that provides centralized call management and call activity reporting capability to a business. Norstar PC Console runs on one or more Pentium™ Class personal computers (PCs) under a compatible Windows operating system.

You can customize the way Norstar PC Console is set up to best suit your company's call management requirements. A telephone attendant uses the graphical user interface to:

- originate calls
- answer and manage multiple calls
- view a company's name before answering the call
- record, add and change caller information for future use
- quickly access information about the caller
- transfer calls to employees or their voice mail
- send the caller's name to the employee's Norstar telephone display
- park calls and page employees
- view information in a Directory about your company's employees such as their extension number, person status and telephone status
- create and print reports showing how incoming calls were handled
- view the status of all extensions in the company's Norstar ICS system

About this guide

This document describes how Norstar PC Console works and how to use it in your company. The instructions in this guide are intended for experienced PC users. The Norstar PC Console User Guide is organized as follows:

Introduction to Norstar PC Console

provides an overview of how this guide is organized, offers references and discusses using shortcut keys and right-click mouse capability.

Understanding Norstar PC Console

explains how Norstar PC Console works and explains the features available with Norstar PC Console.

Getting started

describes how to start, minimize, maximize and close the Norstar PC Console Server and Attendant programs and how to change the different Attendant setups.

Working with the Attendant main window

focuses on the components of the Norstar PC Console Attendant main window.

Handling calls	explains how an attendant answers and directs incoming calls and how a person being called answers and manages calls.
Maintaining Caller and Employee information	describes how you enter, edit and maintain caller and employee information.
Generating reports	focuses on how to use the Norstar PC Console Reports program to generate and customize various reports.
Glossary	defines terms and acronyms used in this guide that are relevant to Norstar PC Console.

Conventions

Naming of window components

Refer to [Components of the Attendant main window on page 21](#) for window terminology used in this document.

Using the keyboard to navigate around Norstar PC Console

You can use the keyboard to do many tasks quickly in Norstar PC Console. There are three kinds of keyboard navigation. The first two types are Windows standard while the third type is particular to Norstar PC Console. They are:

- Access keys which are the letters underlined in menu names and commands. For more information, refer to [Access keys on page 2](#).
- shortcut keys defined on the menus. For more information, refer to [Shortcut keys defined on the menus on page 3](#).
- commands initiated by holding down the **Alt** key plus an additional key. For more information, refer to [Commands initiated by holding down the Alt key plus an additional key on page 3](#).

Access keys

In Norstar PC Console, each menu name as well as each command within the menus contain an underlined letter called an Access key.

To use the Access keys:

1. Press and release the **Alt** key. This gives you access to the menu names in the menu bar.
2. Press the Access key for the menu name and release it. For example, to open the **E**dit menu, press **Alt** then **E** and the **Edit** menu will be displayed.
3. Press the Access key for the desired command. For example, to select **C**aller Information from the **Edit** menu, press **I** and the **Edit Caller Information** dialog box will be displayed.

Shortcut keys defined on the menus

Shortcut key combinations are indicated beside some menu commands. In cases where the **Ctrl** key is with another key, make sure to hold the **Ctrl** key down while pressing the second key in the combination. The additional shortcut keys are as follows.

In the **Edit** menu:

Cut	Ctrl+X
Copy	Ctrl+C
Paste	Ctrl+V
Dial Paste	Ctrl+D
Transfer Paste	Ctrl+T

In the **Transfer** menu:

1st Contact	F9
2nd Contact	F10
3rd Contact	F11
Transfer to Target	Num Pad+
Screen Transfer	Ctrl Num Pad+

In the **Caller** menu:

Answer Next	Esc
Hold	Ctrl+H
Release	F12

Commands initiated by holding down the Alt key plus an additional key

Call handling functions can be accessed directly from the Attendant window using the **Alt** key in combination with the underlined keys in the commands. Using this method, the **Alt** key must be held down while the other key is being pressed. For example, to place an active call on **Hold**, hold down the **Alt** key and press **H**.

Processing a call with right-click mouse capability

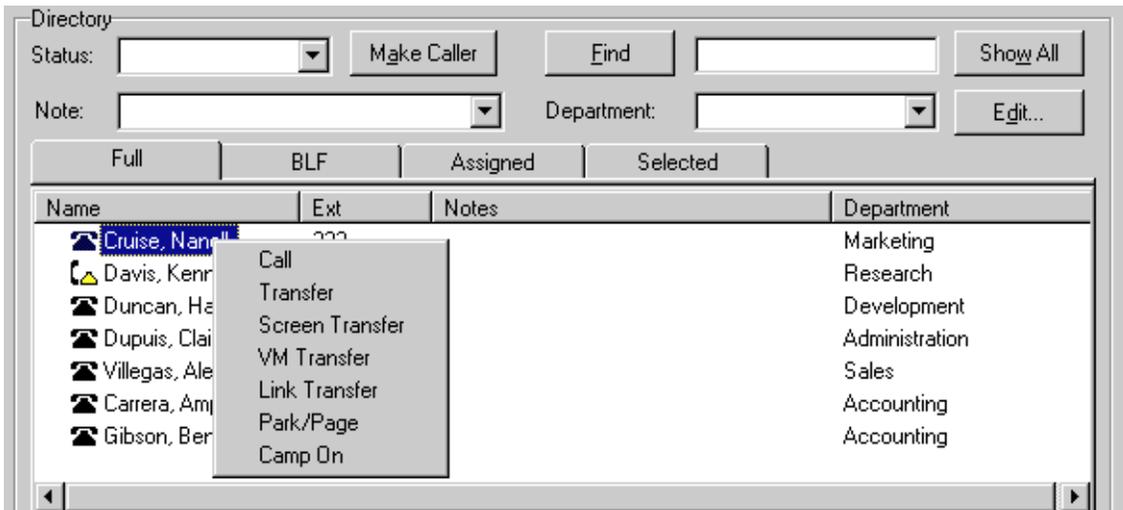
Right-click mouse capability can help you process calls faster by minimizing mouse movement. The following call processing options are available with right-mouse capability:

- originate a call
- transfer a call
- screened transfer

- transfer a call to voice mail
- link transfer
- park a call and page an employee
- camp a call on an extension

To use right-click mouse capability:

1. Position the cursor on a name or extension in the **Directory** group box and right-click the mouse. A drop-down list of call options appears.



2. Click (left- or right-click) one of the call processing options.

References

As a Norstar PC Console attendant, you may need to refer to the **Norstar PC Console Installation Guide**.

Norstar PC Console is a client/server software application that consists of the following three interrelated programs operating together under a Windows operating systems:

- Server program. Refer to [Server program on page 5](#)
- Attendant program. Refer to [Attendant program on page 5](#)
- Reports program. Refer to [Reports program on page 6](#)

Server program

The Server program communicates with your Norstar Integrated Communication System (ICS) initiating Norstar telephone functions such as transferring calls, placing calls on hold and parking calls.

The Server program talks with one or more Attendant programs. An Attendant program can be either on the same PC as the one with the Server program or on a separate PC connected via a Local Area Network (LAN).

The Server program receives:

- notification of all incoming calls
- status changes of all telephones attached to the Norstar ICS

The Server program collects and manages call-processing information in a database that can be used for reporting purposes.

Attendant program

The Attendant program has an easy-to-use graphical user interface. The Attendant main window displays information about incoming callers and includes a Company Directory with employee names, telephone status (such as on-hook, off-hook, do not disturb and call forward) and personal status (None, Not at desk and Out of office). The Directory can be searched from the Attendant main window.

Attendant PCs can be either main, assistant, overflow or backup. For more information, refer to [Types of attendant setups on page 13](#) . Incoming calls can be transferred to an extension, a voice mailbox or to an external number.

Your company can be set up with more than one attendant. Norstar PC Console can also be set up to provide call coverage for assigned groups of employees. In this setup, you are notified of calls to assigned employees and can answer calls when those employees cannot.

Reports program

The Reports program provides information about incoming calls to your company. Reports can help you identify trends and find answers to questions before they become problems. You can request a report from any PC with an Attendant program and view the report in the Reports window or print it on an attached printer.

Norstar PC Console features

There are many features and benefits associated with Norstar PC Console.

Easy to use, time saving Graphical User Interface (GUI)

Norstar PC Console has a GUI that is uncomplicated and uncluttered compared with other attendant consoles, without sacrificing sophisticated features. It is easy to select the correct buttons to process incoming calls and very few key strokes are required for most everyday activities. In fact, answering an incoming call and transferring it to an extension usually requires only two steps: clicking a **Loop** button to answer the call and double-clicking the icon beside the called party's name to transfer the call.

The GUI provides you with information at-a-glance about the progress and status of calls. Even before a call is answered, you are provided with advance information about the call and caller, including the caller's telephone number and the length of time that the caller has been waiting. When calls are transferred back to you, the Attendant main window immediately displays the status of the call.

On-line help is readily available which ensures that Norstar PC Console is easy to learn and to use.

Because performing normal attendant functions is faster with a GUI, your time is freed up to do other tasks.

Advanced software capabilities

Here are some of Norstar PC Console's advanced software capabilities:

Visual call announcing and control

Even when a telephone is busy with a call, an attendant can send caller information to the telephone's two-line display area. Using display buttons, the person being called can control the call accordingly. This is a unique feature because it means that important calls will not be lost.

Backup attendant

Incoming calls can be quickly and easily transferred to a backup attendant sitting at a different location than the main attendant. This means that the backup attendant does not have to leave his or her own desk to cover for the main attendant.

Overflow attendant

Overflow calls are transferred to an overflow attendant. Consequently, calls will not be lost during busy periods.

Reports	Norstar PC Console provides reports, allowing you to obtain periodic information such as the number of incoming calls and who answered the calls. This is important information because it can indicate the calling trends within the business and the performance of the telephone system.
Ability to handle growth	A one-time purchase of Norstar PC Console is often all that is ever needed. If you want to add more attendant positions as the company grows, Norstar PC Console is easily expandable.

Attractiveness of PC compatibility

Norstar PC Console has combined telecommunications with personal computing to make the attendant's job easier, faster, and more efficient.

Use of existing hardware	There is no need for you to purchase additional dedicated hardware to obtain the power of Norstar PC Console. Provided you have the minimum computer requirements, all that is needed is the software and a simple hardware enabler allowing your computer to communicate with the Norstar ICS.
Multi-tasking	Norstar PC Console works in a multi-tasking environment. You can use your PC for other tasks such as word processing in addition to attending to calls. You can quickly switch from PC tasks to the Attendant main window when there is an incoming call.

Attendant types

Each PC that has the Attendant program installed is set up to handle calls either as a main attendant, overflow attendant, backup attendant or assistant attendant. Each attendant type provides flexibility in responding to calls. This ensures that all calls can be handled in a professional and timely manner. For detailed information about attendant setups, refer to [Types of attendant setups on page 13](#).

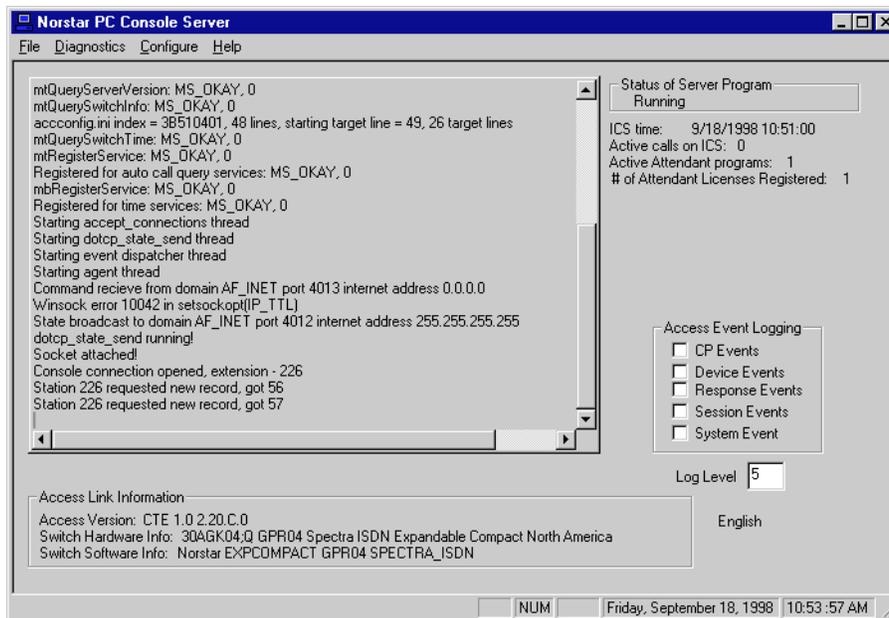
Once your Norstar PC Console system is set up and checked by the installer or system administrator, you can use the Norstar PC Console programs. Before you handle calls, you should know how to start and exit from Norstar PC Console on your PC. For starting the programs for the first time, refer to [Initializing and configuring the Attendant program on page 12](#).

Starting the Server program

You must start the Server program before the Attendant program.

To start the Server program:

1. On the Windows taskbar, click **Start** and point to **Programs**.
2. Point to **Norstar PC Console** and click **Server**. The **Norstar PC Console Server** button, , is added to the Windows taskbar.
3. Click the **Norstar PC Console Server** button and the **Norstar PC Console Server** window appears. The Server program is ready to use when the **Status of Server Program** group box indicates **Running**.



4. When you have checked that the Server is running, click **Minimize**, , to minimize the Server window.

Shutting down the Server program

We recommend that you leave the Server program running at all times. In the event you must shut it down, perform the following steps.

To shutdown the Server program:

1. On the Server PC, click the **Norstar PC Console Server** button on the taskbar to restore the **Norstar PC Console Server** window (if it is not already open).
2. Click **File** and then click **Exit**. A dialog box appears asking if you want to close the Server.
3. Click **Yes**.

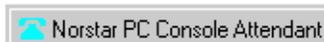
The **Norstar PC Console Server** window closes and the **Norstar PC Console Server** button, , no longer appears on the taskbar.

You can also shut down the Server program by right-clicking  on the Windows taskbar and clicking **Close**, or clicking the **Close** box in the title bar.

Starting the Attendant program

Check that the Server program has been started and the **Status of Server Program** group box says “Running” before starting the Attendant program. For information about setting the attributes of the Attendant main window refer to [Initializing and configuring the Attendant program on page 12](#).

To start the Attendant program and open the Norstar PC Console Attendant main window:

1. On the Attendant PC, click **Start** on the Windows taskbar and point to **Programs**.
2. Point to **Norstar PC Console** and click **Attendant**. The Norstar PC Console Attendant button, , is added to the taskbar.
3. The **Norstar PC Console 1.1** introduction window appears briefly, then the Attendant main window appears. The Tip of the Day window appears.
4. Click **Close** on the **Tip of the Day** window.
5. After a few seconds, the **Server** icon, , and then the **Synchronization** icon, , appear on the Status Bar.

Note: The **Server** icon, , and the **Synchronization** icon, , must both be present on the Status Bar before calls can be processed.

Minimizing and maximizing the Attendant main window

The Attendant main window can be minimized or maximized depending on your needs.

To minimize the Attendant main window:

1. Click **Minimize**, , in the title bar. The Attendant main window minimizes.

To maximize or re-open the Attendant main window:

1. Click the **Norstar PC Console Attendant** button, , on the taskbar.

Shutting down the Attendant program

To shutdown the Attendant program:

1. Click **File** and then click **Exit**.

The Attendant main window closes and the **Norstar PC Console Attendant** button no longer appears on the taskbar.

You can also shut down the Attendant program by right-clicking the **Norstar PC Console Attendant** button on the Windows taskbar and clicking **Close**, or clicking the **Close** box in the title bar.

Checking that the Server and Attendant programs are running

If your PC has both the Server and the Attendant programs installed, be sure both are running and that they are communicating with each other.

To check that the Server and Attendant programs are running:

1. Check that both  and  appear on the taskbar. If either does not appear, refer to [Starting the Server program on page 9](#) and [Starting the Attendant program on page 10](#).

Note: If your PC has only the Attendant program installed, verify that it is running by checking that  appears on the taskbar.

2. Check that  and  appear in the Status Bar of the Attendant main window.

If you encounter difficulty, refer to the **Norstar PC Console Installation Guide** or contact your system administrator.

Initializing and configuring the Attendant program

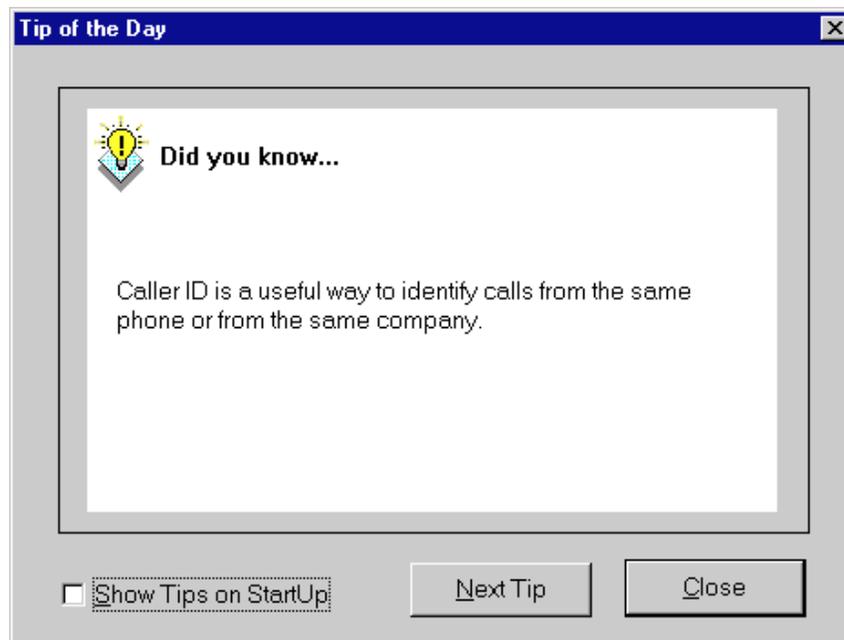
Each PC that has the Attendant program installed must be set up to handle calls either as a full-time main attendant, part-time main attendant, backup attendant, overflow attendant or assistant attendant.

Starting the Attendant program for the first time

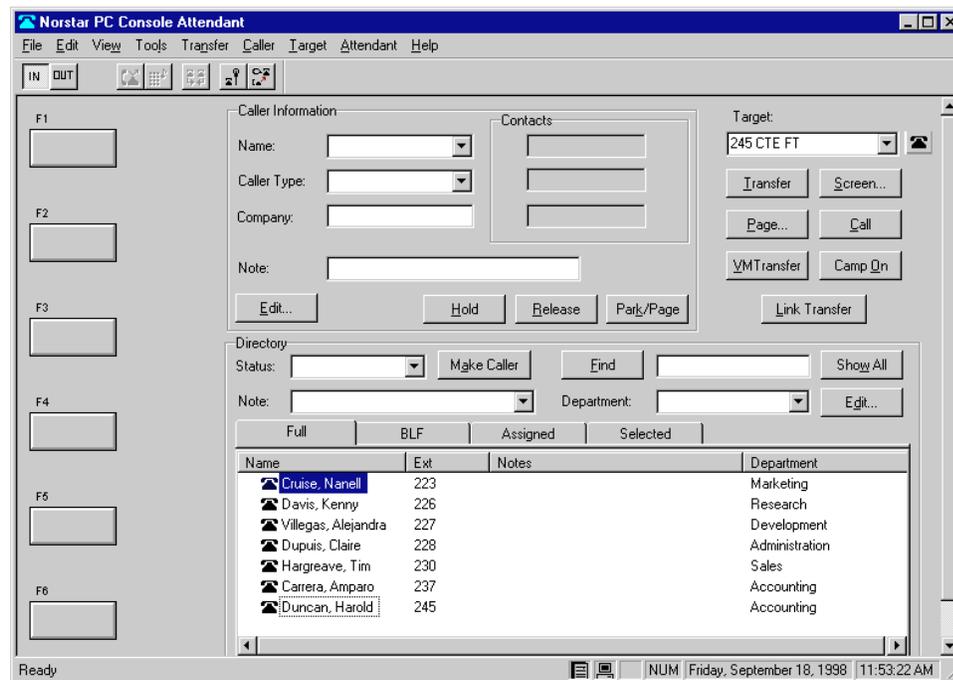
Now that the Server program is set up and operational, the Attendant program can be started and set up.

To start and set up the Attendant program:

1. On the Windows taskbar, click **Start**, point to **Programs**, and then point to **Norstar PC Console**.
2. Click **Attendant**. The Attendant program starts.
3. The first time the Attendant program is started after installation, the **Enter Attendant Options** dialog box appears.
4. Enter the extension number for the attendant into the **Attendant Extension** box.
5. If the network has more than one Norstar PC Console Server running, you will need click the **Server ID** box and enter the Server ID for the server you want to use. The Server ID refers to the Windows TCP/IP host name of the Server PC. For information about how to determine the Server ID, refer to Determining the TCP/IP host name of a Server PC in the Norstar PC Console Installation Guide. If there is only one Norstar PC Console Server running, leave this field blank and the Attendant program automatically connects to that Server program.
6. Click **OK**. The **Tip of the Day** dialog box appears over the **Norstar PC Console Attendant** main window.



7. Click **Close**. The **Norstar PC Console Attendant** window main window appears.



8. As soon as the Attendant program begins communicating with the Server program, the **Server** icon, , appears in the Status Bar at the bottom of the Attendant main window.

The Attendant program obtains setup information from the Server program. As this happens, the individual Norstar telephone extensions appear in the **Directory** group box on the Attendant main window. When the setup is complete, the **Directory** displays all extensions that are connected to the Norstar ICS and the **Synchronization** icon, , appears in the Status Bar at the bottom of the Attendant main window.

Types of attendant setups

Each PC that has the Attendant program installed must be set up to handle calls either as a main attendant, overflow attendant, backup attendant or assistant attendant.

Full-time main attendant setup

The full-time main attendant setup is intended for a telephone operator that has the Attendant main window always visible on their PC. There can be more than one full-time attendant.

Every Attendant program has to have the Server ID and Attendant extension options set properly for the Attendant program to function. The Server ID indicates to the Attendant program where the Norstar PC Console Server program is located. The Attendant extension setting indicates to the Attendant program which Norstar telephone belongs to the attendant.

Once the settings are completed, the Attendant program displays all incoming calls to the attendant's telephone which appear on the Attendant main window as a yellow **Ringling Loop** button. If the attendant's telephone has been programmed to receive all incoming calls for the company, that is as a main attendant, then the Norstar PC Console Attendant program now also displays those calls.

In order to receive and make calls properly, the Attendant program requires that an extension be associated with the program. The extension must be a valid extension on the Norstar system and should be the telephone located at the attendant's desk.

To set or change the attendant's extension number:

1. Click **Tools** then **Options**. The **Options** dialog box appears with the **Options** tab displayed.
2. Click the **My Extension** box in the **Attendant** group box.
3. Type the extension number of the attendant's telephone.

Part-time main attendant setup

The part-time main attendant is an attendant that is available to answer incoming calls and also performs additional functions on the PC, such as word processing.

The difference between the full-time main attendant setup and the part-time main attendant setup is that the part-time setup has additional Attendant options selected which allow notification of incoming calls when the attendant program is minimized. Refer to [Full-time main attendant setup on page 13](#) and [Setting up other attendant features on page 17](#).

Backup attendant setup

A backup attendant is an attendant position that receives calls that have been re-directed from another attendant position. The backup attendant can, at the same time, be operating as a main attendant or assistant attendant, or any combination of the attendant types.

Note: As with all Attendant program setups, the Server ID and Attendant extension options have to be set within the **Options** dialog box. Once this is done, the Attendant program displays all incoming calls that arrive on the attendant's Norstar telephone. Refer to [Setting up other attendant features on page 17](#).

Each Attendant PC that was set up originally to receive incoming calls must be set up to re-direct the calls to the backup Attendant PC.

Note: Calls can be redirected to another Norstar PC Console attendant or any Norstar extension within the company.

When the attendant needs to leave the position, the backup attendant position can be activated by using the **OUT** button, , on the Attendant main window. This button indicates that the attendant is no longer present at the station and that all calls should be diverted to the specified position. After clicking , the attendant can complete the calls currently in progress on the Attendant main window. New calls are displayed at the absent attendant's PC, but are also presented to the backup attendant's PC. Even though the attendant is out, the Attendant program is still able to process calls, if required.

To set up the backup attendant:

1. On the **Options** tab on the **Options** dialog box, click the **Extension** box in the **Redirect calls to** group box.
2. Type the backup attendant's extension number.
3. Select **I am Out** to control call redirection by  on the toolbar of the Attendant main window.

Overflow attendant setup

An overflow attendant receives calls that have been redirected from some other attendant position as a result of more incoming calls than **Loop** buttons on the other Attendant program. For example, if a main attendant is already handling six incoming calls, the next call would be redirected to the overflow attendant until one of the main attendant's six **Loop** buttons is free.

The overflow attendant may also be operating as a main attendant, an assistant attendant or any combination of the attendant types.

Note: As with all Attendant program setups, the Server ID and Attendant extension options have to be set within the **Options** dialog box. Once this is done, the Attendant program displays all incoming calls that arrive on the attendant's Norstar telephone.

When you set up an Attendant PC as the overflow, each Attendant PC that was originally set up to receive incoming calls has to be setup to redirect calls to the overflow Attendant PC whenever overflow conditions exist. At each Attendant PC, the overflow feature needs to be activated.

Note: Calls can be redirected to another Norstar PC Console attendant or any Norstar extension.

When the overflow condition (all **Loop** buttons in use) occurs on the Attendant position, the **Loop** overflow icon, , in the Attendant Status Bar is turned on and the overflow call is automatically diverted to the specified extension.

To define the overflow extension:

1. On the **Options** tab on the **Options** dialog box, click the **Extension** box in the **Redirect calls to** group box.
2. Type the overflow attendant's extension number.
3. Select **Call overflow occurs** to redirect calls when all of the main attendant's **Loop** buttons are busy with calls.

Assistant attendant setup

An assistant attendant provides call coverage for one or more extensions in the system. This means that an Attendant program can be set up so that it monitors all incoming calls to specified extensions. Since the assistant typically uses a PC for other work, Norstar PC Console provides a way to alert the assistant without requiring the main window to always be visible on the system. By selecting **Assigned extension rings** in the **Options** dialog box, a **Call Notification** dialog box pops informing the assistant that an outside call for an Assigned extension is present.

The **Assigned** feature is used when an employee would like the assistant attendant, such as an administrative assistant, to answer the employees' calls.

Note: In most cases, calls that have originated from outside the company, are displayed on the assistant attendant's main window. All internal calls from an extension to an assigned extension functions as usual and are not displayed on the assistant attendant's main window.

The Assistant function is enabled by entering extensions into the **Assigned** box on the **Assigned** tab on the **Options** dialog box.

To add or remove an assistant attendant's assigned extensions:

1. Click **Tools** in the Main menu then click **Options** in the **Tools** menu.
2. Click the **Assigned** tab on the **Options** dialog box.

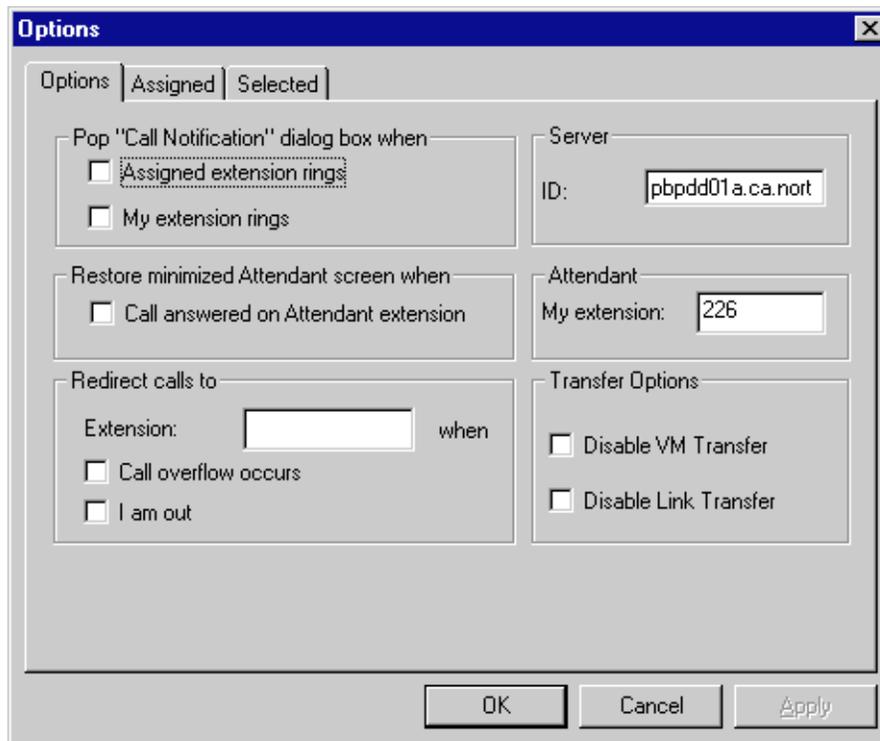
To add an extension, click the extension you want in the **All extensions** box then click **>>** to copy it to the **Assigned extensions** box.

To remove an extension from the **Assigned extensions** box, click the extension number in the **Assigned extensions** box and click **<<**.

The extensions that have been assigned can be viewed at any time by clicking on the **Assigned** tab in the **Directory** group box of the Attendant main window.

Setting up other attendant features

Attendant features for the different setups are configured through the **Options** dialog box. On the **Tools** menu, click **Options** to display this dialog box.



The **Options** tab is displayed when the **Options** dialog box first opens. It is divided up into the following group boxes.

Group box	Description
Pop "Call Notification" dialog box when	sets the Call Notification dialog box to pop onto the screen.
Restore minimized Attendant screen when	sets whether or not the Attendant main window is restored when a call is answered on your extension.
Redirect calls to	sets the overflow or backup attendant.
Server	displays the name of the server. If there is more than one server you can manually enter the server name.
Attendant	displays the attendant's extension. You must manually enter this during setup
Transfer Options	disables voice mail and link transfer options.

Table 1: Functions of the Options dialog box group boxes

Notifying the attendant of incoming calls

There are two ways an attendant can be notified of incoming calls:

- When the attendant is busy working on other activities in Windows, Norstar PC Console is usually minimized on the Windows taskbar. The attendant can be notified of incoming calls with a **Call Notification** dialog box. The attendant can answer the call by clicking **Take** on the dialog box or ignore the call, allowing another attendant to answer it.
- When the main window is visible (not minimized), the **Call Notification** dialog box does not appear. The attendant is notified of an incoming call by a **Ringing Loop** button.

To activate call notification:

1. In the **Pop “Call Notification” dialog box when** group box, set the options to either one of the following:

Assigned extension rings - The attendant is notified of calls to the assigned extensions.

or

My extension rings -The attendant is notified when their own extension has an incoming call.

When both check boxes are clear, the attendant is not notified of calls when the main window is minimized.

Automatic restoring of the Attendant main window when a call comes in

The Attendant main window is normally minimized or under another window in a part-time attendant environment. The attendant always has the option to restore the screen by clicking on the **Norstar PC Console Attendant** button in the Windows taskbar. A quicker method is to set the Attendant main window to restore automatically.

The Attendant program can automatically restore the main window when the attendant's extension goes off-hook (“active”). This assures the attendant has access to the Attendant main window without having to manually restore it.

To set the Attendant main window to restore automatically:

1. In the **Restore minimized Attendant screen when** group box, click the **Call Answered on Attendant extension** check box.

The main window is restored when the attendant uses the extension to make or answer a call.

Save the Attendant program options

1. Click **OK** to save the changes you made on the **Options** dialog box or click **Cancel** if you made no changes or do not want to save the changes. The Attendant options are operational immediately after saving the changes.

Setting the Attendant Selected option

In addition to the **Full** tab in the **Directory** group box of the Attendant main window, there is a **Selected** tab that allows the attendant to view a selected subset of the full directory. This is particularly useful when the attendant's incoming calls are directed to a limited number of extensions.

To display selected extensions in the **Directory** group box of the Attendant main window:

1. Click **Tools** in the Main menu then click **Options**.
2. Click the **Selected** tab on the **Options** dialog box.

To add an extension, click the extension you want in the **All extensions** box then click **>>** to copy it to the **Selected extensions** box.

To remove an extension from the **Selected extensions** box, click the extension number in the **Selected extensions** box and click **<<**.

Setting Transfer options for voice mail and linking

If your Norstar ICS is not connected to a Centrex switch and/or is not connected to Norstar Voice Mail, then the **Link Transfer** and/or **VM Transfer** buttons on the Attendant main window can be disabled.

To disable the **Transfer Options**:

1. Click **Tools** in the Main menu then click **Options** in the **Tools** menu. The **Transfer Options** group box is located in the bottom right of the dialog.
2. Select the **Disable VM Transfer** check box to disable the **VM Transfer** button.
3. Select the **Disable Link Transfer** check box to disable the **Link Transfer** button.

Once disabled, the buttons appear grayed out on the Attendant main window. The buttons can be re-enabled by removing the check mark from the appropriate check box.

Working with the Attendant main window

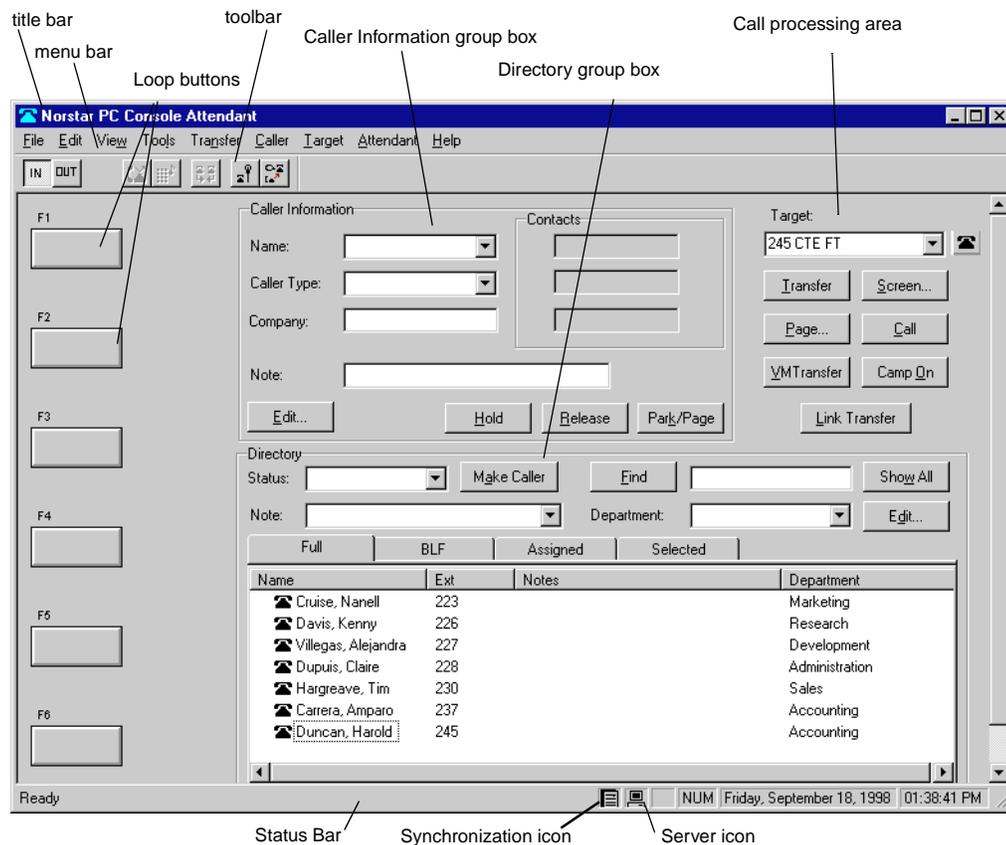
4

This section explains how to use the buttons and group boxes on the Norstar PC Console Attendant main window with the mouse and the keyboard.

Components of the Attendant main window

The Norstar PC Console Attendant main window includes the following:

- title bar
- menu bar
- toolbar
- **Loop** buttons
- **Caller Information** group box
- call processing area
- **Directory** group box
- Status Bar



Components of the Attendant main window

Title bar

The title bar is located at the top of the Attendant main window. The program icon that appears on the left side of the title bar when clicked contains: Restore, Move, Size, Minimize, Maximize, and Close. The telephone icon and the program title, Norstar PC Console Attendant is displayed. On the right side are the Windows standard **Minimize**, **Maximize** and **Close** buttons.

Menu bar

The menu bar, located just beneath the title bar, displays the menus available including File, Edit, View, Tools, Transfer, Caller, Target, Attendant and Help. From these menus you can access many of the functions available in the Attendant program. The menu bar is always visible on the Attendant main window.

Toolbar

The toolbar, located just beneath the menu bar, contains several buttons that provide quick and easy access to selected Norstar PC Console functions.

Loop buttons

The **Loop** buttons are on the left of the Attendant main window labeled F1, F2 and so on, and are used to answer calls. Each **Loop** button can handle a single call. The color of a **Loop** button and the displayed word indicate the type of call activity occurring. For example, a yellow **Loop** button with the displayed word **Ring** indicates an incoming call at the attendant's extension. You can choose to hide or display all **Loop** buttons except those that indicate call activity by selecting and de-selecting **Hide Loop Buttons** on the **View** menu. Refer to [View menu on page 25](#).

Caller Information group box

The **Caller Information** group box, in the top center of the Attendant main window, displays information about the caller that is stored in the Norstar PC Console database.

Call processing area

You can make and transfer calls by using the **Target** box and Call Processing buttons at the top, far-right of the Attendant main window.

Directory group box

The **Directory** group box, located at the bottom of the Attendant main window, consists of three parts:

Directory list	displays four different tabbed views of extension information such as name, extension, notes and department. From here you can select a name and number to appear in the Target box. The Directory list also indicates telephone status icon and person status icon.
Note and Status boxes	allow you to change the status of the employee and write information in a note for an extension.
Find and Department boxes and the Show All and Edit buttons	provide a means of searching for extensions and editing employee information and extension records.

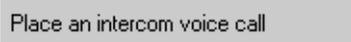
Status Bar

The Status Bar, located at the bottom of the Attendant main window, toggles between being displayed and not being displayed.

To display the Status Bar:

1. Click on the **View** menu.
2. Click on the **Status Bar** menu item. A checkmark is displayed.

The Status Bar provides the following information:

	When the mouse is pointing at a button on the toolbar, the Status Bar displays a descriptive help message about the button.
	The Synchronization icon is displayed after starting Norstar PC Console when the Server and the Attendant databases are communicating with each other.
	The Server icon is displayed when the Attendant program on your PC is connected to the Server.
	The Loop Overflow icon appears when there are more calls waiting to be answered than there are Loop buttons available.
	The NUM Lock message appears when the Num Lock key is on.
	The current date and time information is always displayed in the Status Bar.

Using the menu bar

The menu bar displays the drop-down menus available from the Norstar PC Console Attendant main window. From these drop-down menus you can access many of the features available on Norstar PC Console.

The menu bar is always visible on the Attendant main window. Help tips appear in the Status Bar at the bottom of the Attendant main window when the mouse moves over the commands in the drop-down menu.

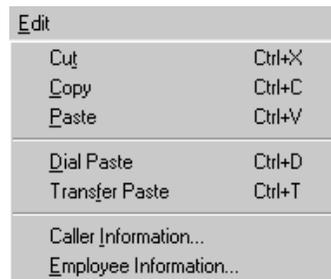
File menu



The **File** menu command is:

Exit closes the Attendant program.

Edit menu



The **Edit** menu commands include:

Cut cuts selected text from an editable box and moves it to the Clipboard.

Copy copies a selection of text from an editable box and moves it to the Clipboard.

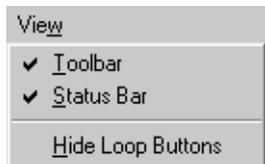
Paste inserts the Clipboard contents at the insertion point.

Dial Paste dials the number in the Clipboard. The number can include special characters such as hyphen, parenthesis, space or period.

Note: The Clipboard contents are appended to any characters already in the **Target** box. This allows you to type a routing code in the **Target** box first and then click **Dial Paste**.

Transfer Paste	transfers a call to the number in the Clipboard.
Caller Information...	opens the Edit Caller Information dialog box. The Edit button in the Caller Information group box performs the same function. Refer to The Edit Caller Information dialog box on page 33 and Maintaining caller information on page 57 .
Employee Information...	opens the Edit Employee Information dialog box. The Edit button in the Directory group box performs the same function. Refer to The Edit Employee Information dialog box on page 37 and Maintaining employee information on page 61 .

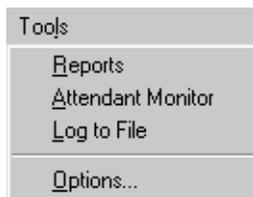
View menu



The **View** menu commands are:

Toolbar	shows/hides the toolbar.
Status Bar	shows/hides the Status Bar.
Hide Loop Buttons	shows/hides the inactive Loop buttons. When checked, only active Loop buttons appear on the Attendant main window.

Tools menu



The **Tools** menu commands are:

Reports	starts the Reports program.
Attendant Monitor	opens the Attendant Monitor dialog box that displays diagnostic information sent by the Attendant program and received back from the Server program. The Attendant Monitor helps in troubleshooting.
Log to File	writes Attendant program activity and Server messaging to a log file. This is used for troubleshooting.

Options... opens the **Options** dialog box which has three tabs.

The **Options** tab:

allows you to assign the Server ID, enter the Attendant extension, select the conditions for making the Norstar PC Console Attendant main window appear, and select the conditions for call redirection.

The **Assigned** tab:

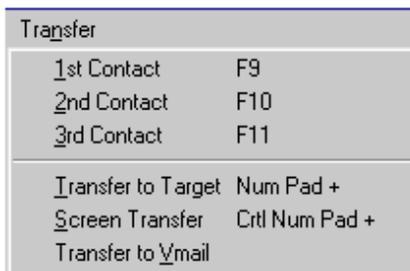
allows you to choose extensions to appear in the **Assigned** tab contained in the **Directory** group box on the Attendant main window.

The **Selected** tab:

allows you to choose extensions to appear in the **Selected** tab contained in the **Directory** group box of the Attendant main window.

For more information, refer to [Using the Directory group box on page 35](#).

Transfer menu



The **Transfer** menu commands are:

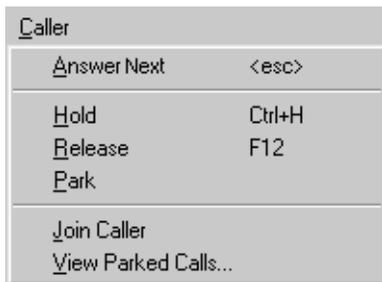
1st Contact transfers the active call to the caller's first contact. This command is enabled when there is an active call and a contact is displayed in the first box of the **Contacts** group box.

2nd Contact transfers the active call to the caller's second contact. This command is enabled when there is an active call and a contact is displayed in the second box of the **Contacts** group box.

3rd Contact transfers the active call to the caller's third contact. This command is enabled when there is an active call and a contact is displayed in the third box of the **Contacts** group box.

Transfer to Target	transfers the active call to the extension in the Target box. The Transfer button performs the same function.
Screen Transfer	screens a call transfer of an active call to the extension number in the Target box. The caller is automatically put on-hold when the Screen Transfer menu option is clicked and then connected when you click Transfer Now in the Screen Transfer dialog box. The Screen button performs the same function. Refer to Parking, holding and screening calls on page 47 .
Transfer to VMail	transfers the active call to the voice mailbox of the extension in the Target box. The VMTransfer button performs the same function.

Caller menu



The **Caller** menu commands are:

Answer Next	answers the next call in the queue.
Hold	places an active call on hold. The Hold button performs the same function. Refer to Parking, holding and screening calls on page 47 .
Release	disconnects the active call. The Release button performs the same function.
Park	places the active call in park so that you can page the person whose extension is in the Target box. A list of all calls parked by all attendant consoles is displayed in the Parked Calls dialog box when you click on View Parked Calls on the Caller menu. The call can be retrieved from the View Parked Calls dialog box by pressing Retrieve . For more information on viewing parked calls, refer to Parking, holding and screening calls on page 47 . The Park/Page button performs the same function.

- Join Caller** connects two callers by joining the active call with the call that is on hold. Refer to [Linking and Joining calls on page 50](#).
- View Parked Calls...** opens the **Parked Calls** dialog box which displays all calls parked by all attendants. A call can be retrieved by any Norstar PC Console attendant or from any telephone in the Norstar ICS. For more information, refer to [Parking, holding and screening calls on page 47](#).

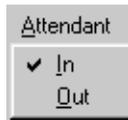
Target menu



The **Target** menu commands are:

- Call** initiates a call from the attendant extension to the number in the **Target** box. The **Call** button performs the same function.
- Voice call** places a voice call from the Attendant to the extension in the **Target** box. For more information, refer to [Contacting employees using Voice Call on page 50](#).
- Dial DTMF Tones** dials DTMF-tone digits to the external number in the **Target** box. This must be used in conjunction with the **Link** button and with outdialing on an active line to access other systems or carriers (for example, Centrex).
- Link** accesses (hookflash) Centrex/CO line features (such as off-premise transfer or conference) or other systems or carriers while on an incoming call. Clicking on the **Link** button while on an incoming call places the caller on hold and generates a Link signal (also called flash or recall) on the active line. The **DTMF** button is used in conjunction with the **Link** button to outdial the digits in the **Target** box. For more information, refer to [Linking and Joining calls on page 50](#).

Attendant menu

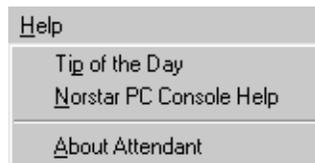


The **Attendant** menu commands are:

- | | |
|------------|--|
| In | acts as a toggle switch with the Out command. When checked, the attendant is in position to take calls. |
| Out | acts as a toggle switch with the In command. When checked, the attendant is not in position to take calls. All calls that ring at the attendant's telephone are forwarded to the backup attendant position. |

Note: Redirection of calls to a backup extension must be set in the **Options** dialog box which is accessed from the **Tools** menu.

Help menu



The **Help** menu options include:

- | | |
|--------------------------------|---|
| Tip of the Day | shows/hides the Tip of the Day window when Norstar PC Console starts. |
| Norstar PC Console Help | displays Help files. |
| About Attendant | displays program information, revision number, copyright information, and system information. |

Using the toolbar

The toolbar contains several buttons that provide quick and easy access to some of the Norstar PC Console functions.

To display the toolbar:

1. Click on the **View** menu.
2. Click on the **Toolbar** command. The toolbar is displayed across the top of the Attendant main window below the menu bar.

The toolbar contains the following:.



The **IN** and **OUT** buttons are used to indicate whether or not you are able to take calls.

Note: Redirection of calls to a backup extension must be set in the **Options** dialog box which is accessed from the **Tools** menu.



The **Link** button is used to access Centrex/CO line features (such as off-premise transfer or conference) or other systems or carriers while on an outside call. For more information, refer to [Linking and Joining calls on page 50](#)



The **DTMF** button is used to dial **DTMF**-tone digits to the external number in the **Target** box. This must be used in conjunction with the **Link** button and with outdialing on an active line to access other systems or carriers such as Centrex. This button is also used to send special characters (for example, *, #) from the **Target** box to other services such as Interactive Voice Response (IVR) and Norstar voice messaging services.



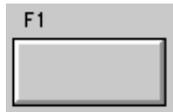
The **Join** button connects two callers by joining the active call with the call that is on hold at the Norstar PC Console. Refer to [Linking and Joining calls on page 50](#).



Clicking the **View Parked** button displays the **Parked** dialog box which contains a list of parked calls. Calls can be parked and retrieved from any Norstar telephone connected to your Norstar ICS. Refer to [Parking calls and paging employees on page 47](#).



The **Voice Call** button initiates a call from the attendant's telephone to the speaker of another telephone without first causing the telephone to ring. Refer to [Parking calls and paging employees on page 47](#).



A total of six **Loop** buttons, labeled F1 to F6, are located on the left side of the Attendant main window and are used to answer a call. Each **Loop** button represents a potential call in-progress. The color of a **Loop** button and the displayed word indicate the type of call activity occurring.

Loop buttons can be hidden or displayed, depending on your preference. Click **View** and then **Hide Loop Buttons**. When a checkmark is displayed, only active **Loop** buttons are displayed and unused **Loop** buttons are hidden. When **Hide Loop Buttons** is not checked, all Loop buttons appear on the Attendant main window whether or not they are active.

Words and colors on Loop buttons



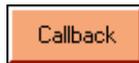
The word **Ringing** appears on a yellow **Loop** button when an incoming call is currently ringing at the attendant's extension.



A green **Loop** button with the word **Active** appears when a call is answered by the attendant. Only one **Loop** button is active at one time.



A blue **Loop** button with the words **On Hold** appears when a call is on hold at the attendant's extension.



An orange **Loop** button with the word **Callback** appears when a call has returned to the attendant from the Target extension.



A red **Loop** button with the word **Ringing** appears when a call is ringing an Assigned extension.



Grey Loop buttons appears when the **Loop** button is inactive and when **Hide Loop Buttons** is not selected from the **View** menu.

Using the Caller Information group box

The **Caller Information** group box is located in the top, center of the Attendant main window. It contains information about the caller that is automatically filled into the boxes by Norstar PC Console when a call is answered.

The **Caller Information** group box includes:

- **Name**, **Caller Type** (Unclassified, Personal, Employee, Vendor, or Customer), **Company** and **Note** box
- **Contacts** group box which displays the three parties the caller most frequently calls in your company

The following buttons appear in the **Caller Information** group box:



opens the **Edit Caller Information** dialog box. Refer to [Maintaining caller information on page 57](#).



places the active call on Hold.



disconnects the active call.



places the active call in park and opens the **Page** dialog box so that you can page the person whose extension is in the **Target** box. Refer to [Parking calls and paging employees on page 47](#).

The Edit Caller Information dialog box

This dialog box is displayed when you click the **Edit** button in the **Caller Information** group box. This is where information about callers is changed or added.

The **Edit Caller Information** dialog box contains the following boxes. Most are editable unless otherwise indicated.

- **Name** box contains the caller's name. A first time caller name would be the Caller ID name provided by the telephone company. You can change this Caller ID name to the actual caller's name.
- **Caller Type** box contains the classification of the caller. There are five types to choose from: Unclassified, Personal, Employee, Vendor and Customer.
- **Company** box contains the name of the company associated with the caller. The **Caller ID** name is automatically filled in this box. It can be edited here or in the **Caller Information** group box.
- **Phone** box contains the telephone number of the caller.
- **City**, **State/Province**, and **ZIP/Postal Code** boxes are related to the caller.
- **Caller ID Name** and **Caller ID Number** boxes contain information provided through subscription by the public switched telephone network.
- **Record Number** box contains a unique caller record identifier number. This box is not editable.
- **Contacts** boxes list the caller's three most frequently called persons in your company.

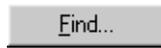
The following buttons appear in the **Edit Caller Information** dialog box:



saves the caller record displayed in the boxes of the **Edit Caller Information** dialog box to the database.



closes the **Edit Caller Information** dialog box without saving the changes to the record.



opens the **Find** dialog box in the **Edit Caller Information** dialog box.



creates a blank caller record which you can fill in.

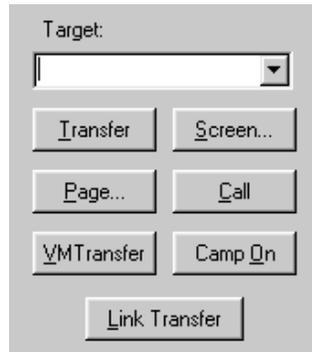


creates a new name caller record using an existing caller record. All boxes except the **Name** box are filled in with the existing caller information. You can then enter the new name.



deletes caller record displayed in the **Edit Caller Information** dialog box from the database.

Using the call processing area



The call processing area is found at the top right of the Attendant main window and includes:

- the **Target** box
- a series of buttons including: **Transfer**, **Page**, **VMTransfer**, **Screen**, **Call**, **Camp On** and **Link Transfer**.



The **Target** box is used to enter the extension or telephone number to be called.

The following buttons appear in the call processing area:



transfers the active call to the extension number in the **Target** box.



screens a call transfer of an active call to the extension number in the **Target** box. Click **Screen** and the caller is automatically put on hold. The caller is connected to the **Target** extension when you click **Transfer Now** in the **Screen Transfer** dialog box.



opens the **Page** dialog box.



makes a call from the attendant's extension to the number in the **Target** box.



transfers the active call to the voice mailbox of the extension in the **Target** box so the caller can leave a message.



places a call on hold at the target extension.



accesses Centrex/CO line features (such as off-premise transfer or conference) or other systems or carriers while on an outside call. It is also used to tone dial the digits in the **Target** box.

Using the Directory group box

The **Directory** group box is located at the bottom of the Attendant main window. It contains tabbed directories showing various views of the extensions on your Norstar telephone system. The **Directory** group box also contains buttons and boxes for searching and editing extension and employee information.

Search and edit functions in the Directory group box

The buttons and boxes in the **Directory** group box are used to search for and edit employee information that appears in the **Directory** list. They are listed below.

 A dropdown menu with the label "Status:" and a small downward arrow on the right side.

indicates the person status of the employee. When an option is selected from the drop-down list box, a corresponding icon appears in the first column of the **Directory** list. The available options are: None, Not at Desk,  and Out of Office, .

 A text input field with the label "Note:" and a small downward arrow on the right side.

used to enter information about individual employees.

A button labeled "Make Caller".

changes the caller/Caller ID record to an employee record when an employee calls in from outside. This prevents an employee name from appearing in the caller record related to the Caller ID name/number.

 A search control panel containing a "Find" button, a text input field, and a "Department:" label with a dropdown menu.

is used to search for names of individual employees or groups of employees by department. The top box is used to search for employee by name and the bottom box is used to search by department. Enter the first few letters of a name in the top box then click **Find**. All of the names that start with those letters are displayed in the **Directory** list. To search by department, choose a department from the **Department** box drop-down list, then click **Find**. All of the employees in the selected department are displayed in the **Directory** list.

A button labeled "Show All".

resets the **Full** tab **Directory** view to display all names and extensions.

A button labeled "Edit...".

opens the **Edit Employee Information** dialog box. If you have a name/extension highlighted in the **Directory** list, information pertaining to that name/extension appears in the dialog box. If you have not selected a name/extension, then the **Edit Employee Information** dialog box is blank. You can also access the **Edit Employee Information** window by clicking the **Edit** menu then clicking **Employee Information**. Refer to [The Edit Employee Information dialog box. on page 37](#) and [Maintaining employee information on page 61](#).

The Edit Employee Information dialog box.

This dialog box appears when you click the **Edit** button in the **Directory** group box. This is where information about employees can be changed or added. For further information, refer to [Maintaining employee information on page 61](#).

The **Edit Employee Information** dialog box contains the following boxes which are editable unless indicated otherwise:

- **Name** box contains the employee's name or the extension number if a name has not been entered.
- **Type** box contains the classification of the employee record. "Employee" is the default.
- **Department** box contains the name of the department associated with the employee.
- **Phone** box contains the telephone number of the employee. The **Phone** box is not editable.
- **City** box displays the city of the employee.
- **State/Province** box displays the state or province of the employee.
- **ZIP/Postal Code** box displays the ZIP code or Postal Code of the employee.
- **Assistant Extension** box displays the extension of the person who handles calls for the extension when the employee cannot.
- **Record Number** box displays a unique record identifier number. The **Record Number** box is not editable.
- **Voice Mail DN** box displays the voice mailbox extension of the employee. The **Voice Mail DN** box is not editable.
- **Contacts** box lists the employee's three most frequently called persons/extensions in the Company.

The following buttons appear in the **Edit Employee Information** dialog box:



saves the employee information displayed to the database.



closes the window without saving the record.



opens the **Find** dialog box in the **Edit Employee Information** dialog box. Refer to [Maintaining employee information on page 61](#)

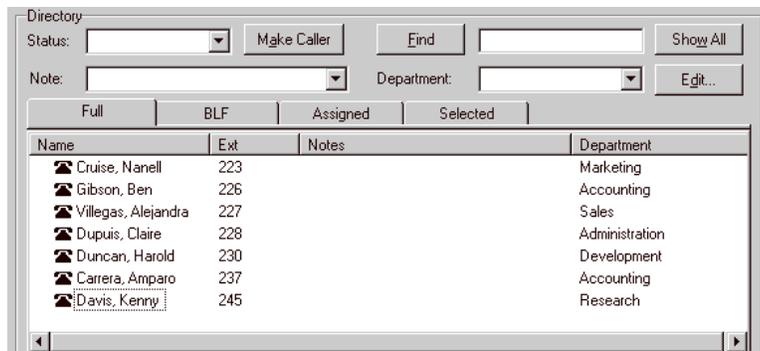


creates a new name for the extension and leaves all other boxes unchanged.

Directory list

Directory list tab views

There are four **Directory** list views that are accessed by clicking on tabs. They are:



Note: The **Synchronization** icon, , must appear on the Status Bar for the information in the **Directory** list to be complete.

Full

displays all extensions that are connected to the Norstar ICS. This includes wireless Companion telephones, Norstar Voice Mail extensions and Hunt group extensions. This view displays the maximum amount of extension and employee information allowed in the **Directory** list.

BLF	also displays all extensions that are connected to the Norstar ICS. As in Full tab view, the BLF (Busy Lamp Field) tab view includes wireless Companion telephones, Norstar Voice Mail extensions and Hunt group extensions. This view, however, only displays the person status icon, telephone status icon and employee name. This allows more extensions to be displayed at once.
Assigned	displays specific extensions for which an assistant attendant is responsible. Like the Full tab view, the Assigned tab view displays the maximum amount of extension and employee information allowed in the Directory list. Extensions are assigned or removed from the Assigned tab view in the Options dialog box. Refer to Assistant attendant setup on page 16 .
Selected	displays a subset of the Full tab extensions. Like the Full tab view, the Selected tab view displays the maximum amount of extension and employee information allowed in the Directory list. Selected extensions are particularly useful when the attendant directs incoming calls to a limited number of extensions and wants to display only those extensions. Extensions are added or removed from the Selected tab in the Options dialog box.

Directory list employee and extension information

Each one of the **Directory** list tab views contains the following types of employee and extension information.

Note: The first two columns are not labeled and contain icons only, no text.

person status icon	This is the left most column in the Directory list views and does not have a column heading. It may contain an icon or be blank. The person status icon provides an indication of the physical location of the employee. Refer to Search and edit functions in the Directory group box on page 36 .
telephone status icon	This is the second column from the left in the Directory list views and does not have a column heading. The telephone icons show the current status of the telephones connected to your Norstar ICS. They also show additional information such as whether the extension is ready to receive calls or has been placed on Do Not Disturb (DND). The telephone icons are:

	Available for calls	Do Not Disturb	Call Forwarded
On-hook			
Off-hook			

Note: A Hunt Group is a group of telephones that can be all called by a single number. Hunt Groups are configured in your Norstar ICS. The telephone status icon for a Hunt Group extension is blue and always indicates on-hook.

The remainder of the columns in the **Directory** list are labeled as follows:

- Name** is the first labeled column on the left and contains the names of employees.
- Ext** contains telephone extensions.
- Notes** displays additional information about the employee that the attendant has entered. The **Notes** can only be edited from the **Notes** box found at the top of the **Directory** group box.
- Department** displays the name of the department to which the corresponding employee belongs. The department is entered by clicking on the **Edit** button and using the **Edit Employee Information** dialog box. Refer to [Maintaining employee information on page 61](#).

Sorting information in the Directory list tabs

Extension and employee information contained in the **Directory** list tabs can be sorted in different ways. In the **Full**, **Assigned** and **Selected** views, the information is contained in columns with headings.

To sort alphabetically by **Name**, **Notes** or **Department**:

1. In the **Directory** list box, click either on the **Name**, **Notes** or **Department** column heading. The information is sorted alphabetically using the column you selected.

To sort numerically by extension:

1. In the **Directory** list box, click on the **Ext** column heading. The information is sorted numerically by extension.

With Norstar PC Console, you can manage calls using either your PC's mouse or the keyboard. When a call comes in, you can respond to the caller either by using the telephone or a headset.

Note: It is recommended that you use a headset so that your hands are free to enter information on your PC.

The basic steps in processing an incoming call with Norstar PC Console include:

answering a call. Refer to [Answering calls as an attendant on page 41](#).

- finding the called person's extension and placing it in the **Target** box. Refer to [Finding the called person's extension and placing it in the Target box on page 43](#).
- transferring a call. Refer to [Transferring a call on page 45](#).

Other telephone functions include:

- parking the incoming call and paging the employee. Refer to [Parking, holding and screening calls on page 47](#).
- linking and joining calls. Refer to [Linking and Joining calls on page 50](#).
- handling a callback call. Refer to [Handling a callback call on page 51](#).
- making a call from the attendant's extension. Refer to [Making a call from the attendant's extension on page 53](#).
- managing calls at the employee's telephone. Refer to [Managing calls at the employee's telephone on page 54](#).

The following steps explain how you handle calls as an attendant using the Attendant main window. For further information about and a diagram of the Attendant main window, refer to [Components of the Attendant main window on page 21](#).

Answering calls as an attendant

The Attendant main window has six **Loop** buttons that are used to answer calls.

Each **Loop** button can handle a single call in-progress. The color of the **Loop** button changes based on the activity occurring. You can show or hide inactive **Loop** buttons by clicking **Hide Loop Buttons** on the **View** menu. If hidden, the **Loop** buttons only appear when a call occurs.

A **Loop Overflow** icon, , on the Status Bar shows that calls are incoming beyond the sixth **Loop** button.

A new incoming call is indicated by a yellow **Loop** button that displays the word **Ring**ing. Information about the call appears around the **Loop** button to assist you in personalized call processing:

- A function key name, located above the **Loop** button, (F1 in the example) designates the function key on the PC keyboard that relates to the ringing **Loop** button.



- A timer, found above the **Loop** button, indicates in minutes and seconds how long the call has been active.
- A company name, displayed on the top line of the information to the right of the **Loop** button, shows the identity of the company that is calling. The company name is either from the caller database or, if the caller is new, from the Caller ID name provided by the telephone company. If you do not subscribe to Caller ID service, then this line of display will be blank. A company name can be entered or edited using the **Caller Information** group box.
- The Caller ID name, displayed on the second line of the information to the right of the **Loop** button, shows the Caller ID number provided by the telephone company. If you do not subscribe to Caller ID service, then this line of display will be blank.
- The bottom line of information to the right of the **Loop** button displays the name of the Norstar ICS line that carried the call.

Note: Norstar ICS line names are programmed in your Norstar ICS by your telephone administrator.

Note: If your Norstar ICS is shared by two or more companies, the telephone administrator can associate the names of each company with their particular hardware lines. This means that you can tell which company is being called, even before answering the call.

To answer an incoming call:

1. A **Loop** button turns yellow and the label changes to **Ring**ing. You can respond to a call one of four ways:
 - Click the yellow **Ring**ing **Loop** button.
 - Press the function key on the PC keyboard (for example, **F1**) shown above the **Loop** button.
 - Press the **Esc** key.
 - Press the associated intercom or line key on your telephone.

The **Loop** button becomes green and displays the word **Active**.

2. Answer the call with your company greeting and determine from the caller to whom they wish to speak. If you are answering a call from this number and/or company for the first time, you can enter caller information. For further information, refer to [The Edit Caller Information dialog box on page 33](#). If you are not, refer to [Finding the called person's extension and placing it in the Target box on page 43](#).

To release or hang up a call:

1. Click . This disconnects the active call and the **Loop** button becomes idle.

Finding the called person's extension and placing it in the Target box

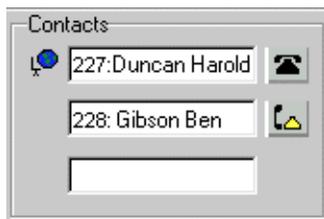
Once a call is answered, the next step is to find and click on the called extension, placing it in the **Target** box.

There are four ways to locate the correct extension when you are ready to process a call, including:

- [Using the Contacts group box on page 43](#)
- [Using the Directory tab views on page 44](#)
- [Using the Directory Find box on page 44](#)
- [Using the Department box on page 45](#)

Using the Contacts group box

The **Contacts** group box is pre-loaded with extension numbers and names of the three most frequently called parties that the caller requests. These caller contacts are listed from most frequently to least frequently called.



To the left of each **Contact** box is the current person status icon for that contact, and to the right of each **Contact** box is that person's telephone status icon.

To transfer a caller to one of the three most frequently called parties:

1. Double-click the telephone status icon.

The call is forwarded to that extension.

Using the Directory tab views

The tab view area in the **Directory** group box contains various views of extensions.

Full				BLF	Assigned	Selected
Name	Ext	Notes	Department			
Cruise, Nanell	223		Marketing			
Gibson, Ben	226		Accounting			
Villegas, Alejandra	227		Sales			
Dupuis, Claire	228		Administration			
Duncan, Harold	230		Development			
Carrera, Amparo	237		Accounting			
Davis, Kenny	245		Research			

To search by Extension or Name:

1. Click the **Full**, **BLF**, **Assigned** or **Selected** tab.
2. Click the extension, the name or the department of the employee being called in the list. The name and/or extension number now appears in the **Target** box.
3. Click **Transfer**.

Using the Directory Find box

Use the **Directory Find** box to search by name.



To search by Name and place the target extension in the **Target** box:

1. Position the cursor in the **Find** box.
2. Type the first letter or letters of the person's last name or first name, depending on how the employee names were entered. For example, if they were entered "Jane Doe", type "j". If they were entered "Doe, Jane", type "d".
3. Click **Find**. All matching names are displayed in a list under the **Full** tab.
4. In the **Directory** list box, click the name of the employee being called. The name now appears in the **Target** box.
5. To restore all names in the **Full** tab view, click **Show All**.

After the search result is shown in the **Full** tab view, the **BLF**, **Selected** and **Assigned** tab views remain unchanged.

Using the Department box

You can search for a name by department on the **Full** tab using the **Department** box.



To search by department:

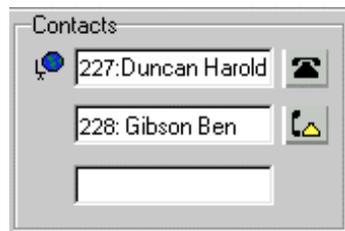
1. Click the down arrow of the **Department** box. A list of departments that are associated with extensions appears in the drop down list.

Note: Department names for each extension are created in the **Edit Employee Information** dialog box.

2. Click a department name from the drop-down list and the department name appears in the **Department** box.
3. Click **Find**. All extensions matching the department are displayed in a list under the **Full Directory** tab view.
4. In the **Directory** list box, click the name of the employee being called. The name appears in the **Target** box.
5. After the search result is shown in the **Full** tab view, the **BLF**, **Selected** and **Assigned** tab views remain unchanged. To restore all names in the **Full** tab view, click the **Show All** button.

Transferring a call

An active call can be transferred to an extension using the **Contacts** box, the **Target** box or the **Directory** group box. A call can also be transferred to voice mail.



To transfer using the **Contacts** box:

1. Double-click the telephone status icon to the right of the **Contacts** box. The call is then transferred to the displayed extension.

To transfer using the **Target** box:



1. Make sure the extension in the **Target** box is correct. Double-click the telephone status icon to the right of the **Target** box or click **Transfer**. You can also use the keyboard by positioning the cursor in the **Target** box and pressing **Enter**. The call is then transferred to the displayed extension.

To transfer using the **Directory** group box list:

Full	BLF	Assigned	Selected
Name	Ext	Notes	Department
Cruise, Nanell	223		Marketing
Gibson, Ben	226		Accounting
Villegas, Alejandra	227		Sales
Dupuis, Claire	228		Administration
Duncan, Harold	230	Working at home	Development
Carrera, Amparo	237		Accounting
Davis, Kenny	245		Research

1. Scroll through the **Directory** list. Double-click the telephone status icon or the name of the person to whom you are transferring the call. The call is transferred.

To transfer a call to the voice mailbox of the extension in the **Target** box:

1. Place the extension number of the employee in the **Target** box.
2. Click . When the caller is transferred the **Loop** button becomes idle.

Note: The **VMTransfer** button can be made inactive when a non-Norstar voice messaging system is attached to the Norstar ICS.

To transfer a call to an outside number:

1. With an active incoming call on Norstar PC Console, position the cursor in the **Target** box.
2. Type an outside telephone number.
3. Click . The **Loop** button label shows **Active**, and the number in the **Target** box is tone dialed.
4. Click **Release** and the incoming call is transferred to the outside telephone number.

The Attendant is disconnected from the call and the **Loop** button becomes idle.

Parking, holding and screening calls

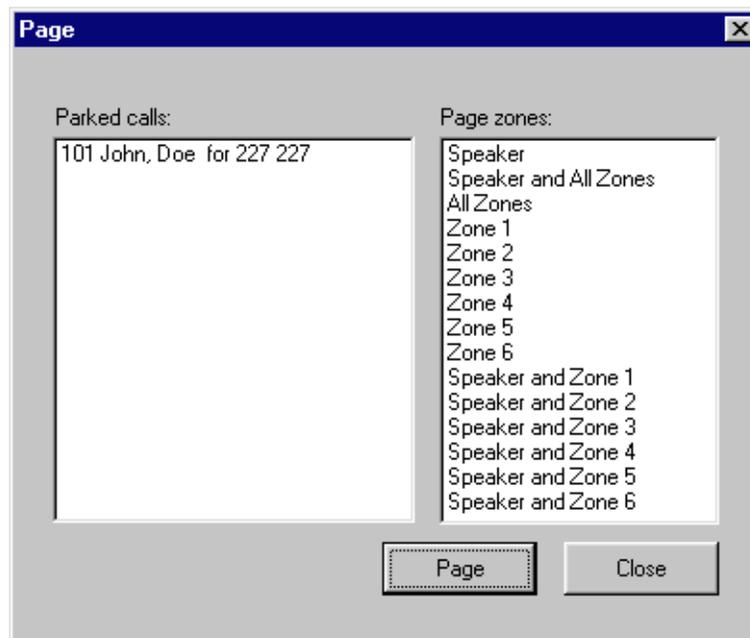
Norstar PC Console provides you with the capability to screen calls for the called person, to place the calls on hold and to park calls so that the called person can be paged. You can also talk to the employee in intercom mode using Voice Call.

Parking calls and paging employees

The Park/Page feature allows you to place a call on Hold and page the employee. You can also use this method to page an employee when there is no active call

To park a call and page an employee:

1. Place the extension number of the called person in the **Target** box. If there is no active call and you just want to page an employee, type or place the extension of the person being paged in the **Target** box.
2. Click **Park/Page**. The **Page** dialog box opens. The **Page** dialog box shows all parked calls and all page zones so that the called person can be paged.



3. Click on a call in the **Parked calls** box and then click on the appropriate zone in the **Page zones** box.
4. Click **Page**. The **Console Message** box appears and a low-level audible tone is emitted by the speakers on the telephones in the selected zone.
5. Speak into the headset or handset (depending on your setup). When finished, click **OK**.

To retrieve a parked call:

1. On the **Caller** menu, click **View Parked Calls**.
2. Select the parked call in the **Parked Calls** dialog box.
3. Click **Retrieve**.



OR

1. On the toolbar, click .
2. Select the parked call in the **Parked Calls** dialog box.
3. Click **Retrieve**.

To view all parked calls that are still in park:

1. On the **Caller** menu, click **View Parked Calls**. A **Parked Calls** dialog box appears and lists all parked calls with the following information:
 - the park number of the call
 - the caller's name (from the **Name** box of the **Caller Information** group box)
 - the name or extension of the called employee
2. Click **Close**. The **Parked Calls** dialog box closes.

Placing and retrieving calls on hold

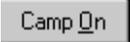
Calls can be easily placed on **Hold** and retrieved quickly.

To put an incoming call on hold:

1. Click the **Ringing Loop** button.
2. Click  or click another Ringing **Loop** button. This automatically puts the previous call on hold.

- When the active call is placed on hold, the **Loop** button label changes to **Hold** and the **Loop** button color changes to blue.

To place a call on Hold at an active extension:

- With an active call on the **Loop** button and the employee's extension in the **Target** box, click . When the active call is camped on the **Target** box extension (placed on hold at the Target extension), the **Loop** button becomes idle.
- The camped call sends a message with tones to the employee either on or off the telephone, indicating a call is camped on their extension.

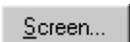
To retrieve a call on Hold:

- Click the blue **Loop** button labeled **On Hold**. The **Caller Information** boxes show all of the information related to this call.
- Respond to the call accordingly.

Screening calls

You can screen calls by talking with the employee first and asking whether they want to talk to the caller.

To screen/transfer a call:

- Click . The active call goes on hold. The **Loop** button changes color to blue. The extension rings and a **Screened Transfer** dialog box appears.



- Ask the person being called if they can take the call. If the answer is yes, click  and the call is transferred. If the answer is no, perform the following steps.
- Click **Cancel**.
- Click the **Loop** button on which the call is being held to reconnect with the caller.
- Process the call accordingly.

Contacting employees using Voice Call

This feature can be used as an intercom to talk directly through the speaker of the employee's telephone.

To use the **Voice Call** button:

1. Position the cursor in the **Target** box and type or enter the extension of the employee.
2. On the toolbar, click .
3. You may now speak to the employee through the speaker in their telephone.

Linking and Joining calls

Using Norstar PC Console, you can link calls to create conference calls or have callers join existing calls to also create conference calls.

To use the **DTMF** button with an active incoming call on a **Loop** button:

Note: The **DTMF** button is used when transferring or linking calls on Centrex lines.

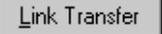
1. Click  on the toolbar. The active incoming call is placed on hold.
2. Position the cursor in the **Target** box and type an outside telephone number.
3. Click  on the toolbar. The number in the **Target** box is dialed out with DTMF tones on the same CO line on which the active incoming call arrived.
4. Click **Release** and the incoming call is transferred to the outside telephone number (using the telephone company's Centrex capability). The Attendant is disconnected from the call and the **Loop** button becomes idle.

To **Join** a call on hold on a **Loop** button with an active call on another **Loop** button:

1. Click  on the toolbar.
2. Drag the "Join" cursor to the **Loop** button on which the call is being held.
3. Click the **Loop** button holding the call. The two callers are now connected, the Attendant is released from the active call and both **Loop** buttons become idle.

To create a conference call to an outside number:

1. With an active incoming call on Norstar PC Console, position the cursor in the **Target** box.
2. Type an outside telephone number.

3. Click . The **Loop** button label shows **Active**, and the number in the **Target** box is tone dialed.
4. Click the **Link** button to set up a conference call between the incoming call, the outgoing call and the Attendant.

When the conference call is finished, click **Release** to disconnect from the call.

Note: To disable the **Link Transfer** button, open the **Options** dialog box on the **Tools** menu and select the **Disable Link Transfer Option** button.

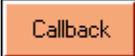
Handling a callback call

There are two types of calls that return to Norstar PC Console:

- a call that was not answered at the extension to which it was transferred
- a call that the called person returned to you for attendant handling

Responding to a callback that an extension did not answer

A callback may be a call that was sent to an extension, not answered and returned to you.

The callback is indicated by .

F1 00:14
 Terra Contours Inc.
 (919) 555-4565
 L1 - SERVICE
 233 - Darren Stevens - Hold

The **Loop** button displays attendant messaging including the name and extension from which the call has returned and other call related information. This allows you to personalize the handling of the call.

To respond to a Callback call:

1. Click .

The **Caller Information** group box shows the information originally displayed so that you can process the call accordingly, such as transfer to Norstar voice messaging, park the call, page the called person, and so on.

Responding to a callback that a called party returned

A call that the called person elects not to take can be handled by you according to instructions that you or your company have established. This type of call is similar to a Callback to the attendant. The called person, can use the buttons below the display area of the telephone, communicate to you, the attendant, how the call should be handled with one of the following pre-set messages:

- **Hold** . You ask the caller to hold for a moment.
- **Assist**. You send the caller to the called party's assistant.
- **IntAct**. You inform the caller that the person they called is currently on the line and ask if they wish to interrupt the call.

The display button pressed by the employee sends a pre-set message to you. Either Hold, Assistant or Interact is displayed below the orange Callback **Loop** button.

To respond to a Callback call that a called party returned:

1. Click  . The **Caller Information** group box shows the information originally displayed.
2. Advise the caller according to the pre-set message that appears.

To process a hold call:

1. Advise the caller that the employee would like them to hold.
2. Enter the employee's extension in the **Target** box.
3. Click  . The call is now camped onto the called employee's extension.

To process an assistant call:

1. Advise the caller that the employee is temporarily unable to take calls and has requested that calls be routed to the Assistant extension.
2. Enter the assistant's extension number in the **Target** box. The number is located in the **Assistant Extension** box on the **Edit Employee Information** dialog box.
3. Transfer the call to the assistant's extension number.

To process an interact call:

1. Advise the caller that the employee is on another call but can be interrupted.
2. If the caller agrees, enter the employee's extension in the **Target** box.
3. Transfer the call back to the extension.

Making a call from the attendant's extension

As the attendant, you can call any extension within the company as well as any outside number. The telephone number you type in the **Target** box does not require special characters such as a hyphen, a parenthesis, a blank space or a comma (special characters are ignored). However, to reach special services such as Interactive Voice Response systems (IVR) you may type special characters (*, #, P, and W) in the **Target** box and these characters can be dialed using  on the toolbar.

To place a call to an extension/outside number:

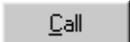
1. When there is no active call, place an extension or outside number in the **Target** box.
2. **Press Enter** on the keyboard. A call is made to the extension/outside number.

To transfer a call to an extension:

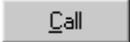
1. Place an extension in the **Target** box when there is an active call.
2. Press **Enter** on the keyboard. The call is transferred to the extension.

Selecting an entry in the **Directory** or in the **Contacts** box also enters the extension number into the **Target** box. When the Target is an extension, the **Person Status** icon for that person appears to the left of the **Target** box, and to the right of the Target is that person's telephone status icon.

To make a call to an inside extension:

1. Make sure that the number you want to call is displayed in the **Target** box. You can type the extension in directly or select it from the **Directory** list. For further information, refer to [Using the Directory Find box on page 44](#).
2. Click  or press **Enter** to make the call.

To make a call to an outside number:

1. Place the cursor in the **Target** box and type the same digits you would dial if you were using your Norstar telephone.
2. Click  or press **Enter**.

Managing calls at the employee's telephone

Norstar PC Console has features which allow the employees to also manage their calls from their telephones.

Once a call has been routed to an extension, a low-level audible tone alerts the called person they have an incoming call, even if they are on their telephone. The name of the caller appears in the display area of the called party's telephone for a few seconds.

The called person has six options for managing the call using the three display buttons below the display area of the Norstar telephone. These include:

- talking to the caller
- placing the call on hold
- sending the call to Norstar voice messaging
- joining the call with the current call
- sending the call back to the attendant to ask the caller if they wish to interrupt the current call
- sending the call back to the attendant to be routed to an assistant attendant

Note: Press the **Next** display button to see more than the first two options that appear.

To talk to the caller:

1. Press the **Talk** display button to automatically connect with the call or pick up the telephone.

If the telephone is in use, pressing the **Talk** display button automatically puts the first call on hold and the new caller is connected.

To send the caller to the attendant who asks the caller to hold:

1. Press the **Hold** display button on the telephone. This delivers a pre-set message to the attendant. The attendant asks the caller to hold for the called person and camps the call onto the called person's extension.
2. The called person sees the call camped onto their telephone and handles the call.

To send the caller to Norstar voice messaging:

1. Press the **VM** display button on the telephone.

The call is automatically transferred to the called person's voice mailbox.

To join the caller with another call:

1. Press the **Join** display button to conference the caller in with your current call.

By looking at the caller's name or Caller ID name in the display area of the Norstar telephone, the called person decides to join the caller with the current call.

To send the call to the attendant who asks the caller if they want to interrupt:

1. Press the **Int.Act.** display button. This delivers a pre-set message to the attendant who asks the caller if they want to interrupt the employee.
2. If yes, the attendant transfers the call back to the employee.
3. The calling party name appears in the Norstar telephone display area of the called person's telephone for approximately 20 seconds. To pick up the call that the attendant transfers back, press the **Talk** display button.

To send the caller to an Assistant extension:

1. Press the **Assist.** display button. This delivers a pre-set message to the attendant. The attendant tells the caller that the called person is temporarily unable to take calls and has requested that they be routed to an Assistant extension.
2. The attendant refers to the **Assistant extension** box in the **Edit Employee Information** dialog box and enters the Assistant extension number in the **Target** box.
3. The attendant transfers the call to the Assistant extension.

Norstar PC Console manages both caller and employee information.

Maintaining caller information

When your company is called, information about the caller available from the Norstar PC Console database appears in the **Caller Information** group box of the Attendant main window. Whether or not you enter information for an incoming call depends on whether the caller is calling for the first time or has called previously and has information already entered in the database.

Creating a new caller record

New caller records are created in the following ways:

- automatically, during an active call, the first time Caller ID information is received by the Attendant program. You can customize the new caller record during the active call or later.

Note: The caller record is not saved if you click **Release** without processing the call.

- when you create a new caller record from an existing one
- when you create a new blank caller record

When a call comes in, Norstar PC Console checks the Caller ID provided by the telephone company to see if the number has previously called. If there is a record that the number has called before, information available from the caller database is displayed in the **Caller Information** group box on the Attendant main window. The **Name** box drop down list displays the names of callers on record that are associated with the incoming Caller ID. There may be several callers from the same telephone number calling if they are employees at the same company. For more information, refer to [The Edit Caller Information dialog box on page 33](#).

When you select the name of the caller from the list, the **Caller Information** group box is populated with information about the caller.

To create a new caller record from an active call:

1. Click on the **Ringling Loop** button to answer the incoming call. Some information may or may not appear in the **Caller Information** group box on the Attendant main window.
2. Click **Edit** in the **Caller Information** group box. The **Edit Caller Information** dialog box appears.

3. Click **New Caller**. This clears all boxes in the **Edit Caller Information** dialog box and allows you to create a new caller record.
4. In the **Name** box, type the caller's name in the format last name first, space, then first name.
5. In the **Caller Type** box, click the down arrow then click a Caller Type, either Unclassified, Personal, Employee, Vendor or Customer.
6. In the **Company** box, type the caller's company's name.
7. Click **Save** and the information can be recalled at a later date. If you click **Close** without saving, you are prompted with the message, "Do you want to save the current record?". Click **Yes** to save the record.
8. After you enter caller information, process the call by:
 - transferring the call to the called party. Refer to [Transferring a call on page 45](#).
 - placing the call on hold. Refer to [Parking, holding and screening calls on page 47](#).
 - transferring the call to Norstar voice messaging. Refer to [Transferring a call on page 45](#).
 - parking the call and paging the called party. Refer to [Parking calls and paging employees on page 47](#).

To create a new name caller record from an existing caller record:

1. Click **Edit** in the **Caller Information** group box on the Attendant main window. The **Edit Caller Information** dialog box appears.
2. Click **New Name**. This clears only the **Name** box in the **Edit Caller Information** dialog box and leaves all other boxes unchanged.
3. Place the cursor in the **Name** box and type the new caller's name.
4. Click **Save** when done to save the record.

To create a new caller record when there are no active calls:

1. Click **Edit** in the **Caller Information** group box. The **Edit Caller Information** dialog box appears.
2. Press **New Caller**. A new blank caller record is created with a new Record Number assigned.
3. Fill in the boxes with the desired information.
4. Press **Save** to save the new caller record.

To create a new caller record associated with an existing Caller ID when there are no active calls:

1. Click **Edit** in the **Caller Information** group box. The **Edit Caller Information** dialog box appears.
2. Click **Find**, and type the name of another caller from the same company and click **OK**.

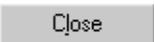


3. Click **New Name** and the **Name** box becomes blank (all other boxes remain unaltered).
4. Type the new caller's name.
5. Click **Save**. The record is now saved in the database.
6. Click **Close**.

To save caller information:

1. Click . The changes made to the boxes in the **Edit Caller Information** dialog box are saved to the database. After clicking **Save**, the **Edit Caller Information** dialog box remains open.

To close the **Edit Caller Information** dialog box:

1. Click . The **Edit Caller Information** dialog box closes.

Note: If you click **Close** without first clicking **Save**, the **Edit Caller Information** dialog box closes without saving any changes.

Finding and editing caller information

Caller information can be edited at any time and the changes can be saved.

To find caller information:

1. Click **Edit** in the **Caller Information** group box on the Attendant main window. The **Edit Caller Information** dialog box appears.
2. Click . The **Find** dialog box appears.



The **Find** dialog box is used to find a caller's name in the database. When the **Find** dialog box opens, the cursor is in the **Name** box.

3. In the **Name** box, type the first letter or letters of the caller's last name.
Note: If the caller's first name is used instead of their last name, type the first letter or letters of the caller's first name.
4. Click **OK** or press **Enter**. The **Find** dialog box closes.
5. All matching names are displayed in the **Name** box of the **Edit Caller Information** dialog box. If there is more than one name, a drop down list appears below the **Name** box.



6. Click on the caller name you want to edit. The information associated with that caller fills in the **Edit Caller Information** dialog box.

To edit a caller's record:

1. Make sure the caller name you want to edit is displayed in the **Edit Caller Information** dialog box. Position the cursor in the box you want to edit and make the change. Repeat if needed.
2. Click **Save** to save the changes to the database.
3. Click **Close** to close the **Edit Caller Information** dialog box.

Note: If you answer a call and then open the **Edit Caller Information** dialog box without first selecting a name from the **Name** box list, you must click **Edit** twice.

To delete an existing caller record:

1. Click **Edit** in the **Caller Information** group box on the Attendant main window. The **Edit Caller Information** dialog box appears.
2. Make sure the caller name you want to delete is displayed.
3. Click . The record displayed in the **Edit Caller Information** dialog box is deleted from the database.

Maintaining employee information

When Norstar PC Console is installed, employee information is extracted by the Server. This information is automatically displayed in the **Directory** list box in the bottom center of the Attendant main window.

The **Directory** list box has four different tabs that display lists of employees. They are **Full**, **BLF (Busy Lamp Field)**, **Assigned** and **Selected**. For further information, refer to [Search and edit functions in the Directory group box on page 36](#).

Working with the Directory list

Information in the **Directory** list appears in ascending order (for example, 1 to 9 or A to Z), and sorting is based on the contents of only one column at a time. When there are different forms of information in the same columns, priority is given in the following order: no information entered (blank), numeric then alphabetic. For example, when you sort a **Name** column that contains both names and extension numbers, the extension numbers appear before the names.

Full	BLF	Assigned	Selected
Name	Ext	Notes	Department
Cruise, Nanell	223		Marketing
Gibson, Ben	226		Accounting
Villegas, Alejandra	227		Sales
Dupuis, Claire	228		Administration
Duncan, Harold	230	Working at home	Development
Carrera, Amparo	237		Accounting
Davis, Kenny	245		Research

You can sort Directory information by column in any of the tabbed views by clicking any column heading. For example, to sort the directory by extension, click on the **Ext** column heading. The listing appears with the extensions in numerical order.

To sort a column of information in the Directory:

1. Click the tab for the view you want to sort, either **Full**, **Selected** or **Assigned**. Information in the **BLF** tab view appears in the same order you selected for **Full** view.
2. Using the mouse, position the cursor and click the column heading you want to sort, either **Name**, **Ext**, **Notes** or **Department**.

Finding an employee record

You can search for an employee by name, by department or by an individual within a department.

You can search by an employee's name two different ways:

- by clicking **Edit** and then **Find** on the **Edit Employee Information** dialog box
- by clicking **Find** in the **Directory** group box on the Attendant main window

To search by name clicking **Edit** in the **Edit Employee Information** dialog box:

1. Click **Edit** in the **Directory** group box on the Attendant main window. The **Edit Employee Information** dialog box appears. For more information, refer to [The Edit Employee Information dialog box, on page 37](#).

The screenshot shows a dialog box titled "Edit Employee Information". It contains the following fields and controls:

- Name: Cruise, Nanell (dropdown)
- Assistant Extension: 278 (text box)
- Type: Employee (dropdown)
- Record Number: 6 (text box)
- Department: Marketing (text box)
- Voice Mail DN: 223 (text box)
- Phone: 223 (text box)
- City: Calgary (text box)
- State/Province: Alberta (text box)
- Zip/Postal Code: (empty text box)
- Contacts: A list box containing three names: Claire Dupuis, Amparo Carrera, and Ben Gibson.
- Buttons: Save, Close, Find..., and New Name.

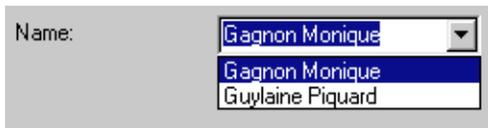
2. Click **Find...**. The **Find** dialog box appears. The **Find** dialog box is used to find an employee's name in the database. When the **Find** dialog box opens, the cursor is in the **Name** box.



3. In the **Name** box, type the first letter or letters of the employee's last name.

Note: If the employee's first name is used instead of their last name, type the first letter or letters of the employee's first name.

4. Click **OK** or press **Enter**. The **Find** dialog box closes. All matching names are displayed in the **Name** box of the **Edit Employee Information** dialog box. If there is more than one name, a drop down list appears below the **Name** box.



To search by name on any **Directory** group box on the Attendant main window:

1. Position the cursor in the **Find** box on the Attendant main window.



2. Type the first letter(s) of the person's surname or given name according to how names are listed in the **Name** column under **Directory**.

3. Click . All names matching the letter(s) you entered are displayed in a list under the **Full** tab **Directory** view.

Full	BLF	Assigned	Selected
Name	Ext	Notes	Department
 Villegas, Alejandra	227		Sales

To search by department:

Note: A department search takes priority over a name search.

1. Click the down arrow of the **Department** box in the **Directory** group box. A list of departments that are associated with extensions appear in the drop down list. The name of the department for each extension is created in the **Edit Employee Information** dialog box.



2. Click the department name from the drop down list and the department name appears in the **Department** box.
3. Click . All extensions matching the department are displayed in a list under the **Full** tab **Directory** view.

To search for an individual within a department:

1. Select the department in the **Department** box.
2. Type the name in the **Find** box.
3. Click . All extensions matching the name within the department are shown in a list under the **Full** tab **Directory** view.

Resetting the Full tab view

The **Full** tab view can be reset to the default display.

To reset the **Full** tab view:

1. Click  in the **Directory** group area.

Regardless of the **Directory** view, the **Full** tab view appears with all extension, names, notes and department information. Use this button to restore the **Directory** view after you perform a search.

Editing employee information

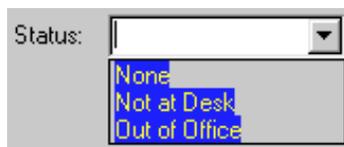
Employee information can be easily edited by adding or changing an extension, changing the person status of an extension or by creating a new name for an extension.

To add or change an extension:

1. In any **Directory** tab view (**Full, BLF, Selected** or **Assigned**), click the extension in the **Directory** list about which you wish to change or add information.
2. Click  in the **Directory** group box. The **Edit Employee Information** dialog box opens. It allows you to create or edit information in the employee database.
3. Position the cursor in any editable box and type in the new information.
4. Click **Save** to save the changes to the database and to automatically apply the changes to the employee's extension in the **Directory**.
5. Click **Close** to close the **Edit Employee Information** window.

To change the Person status of an extension:

1. In any of the **Directory** views (Full, BLF, Assigned or Selected), click the extension.
2. Click the drop down arrow of the **Status** box (found in the **Directory** group box).



3. Click the status from the drop down list, either None, Not at desk or Out of office. The status you chose now appears as an icon in the **Directory** view to the far left of the extension Name.

There is no icon for None. Instead, a blank space appears next to the person's telephone status if this is selected.  or  appear when **Out of office** or **Not at desk** (respectively) are selected from the list.

Note: Do not type in the **Status** box.

Creating a new name for an extension

You can change the name of an employee assigned to an extension.

To create a new name for an extension:

1. In the **Directory** group box, click **Edit**. The **Edit Employee Information** dialog box appears.
2. Click . The cursor is positioned in the **Name** box and the **Name** box is ready for editing. All other boxes in the **Edit Employee Information** dialog box are unchanged.
3. Type in the new employee's name.
4. Click **Save** when done.

Using the Make Caller button

This function is used when an employee calls from a customer's office.

To assign the name of an employee to a caller record:

1. Select the employee's extension in the **Directory** (or enter the employee's extension number in the **Target** box)
2. Click  .

The name of the employee is now assigned to the caller record and is not saved as a customer record.

Adding notes to employee records

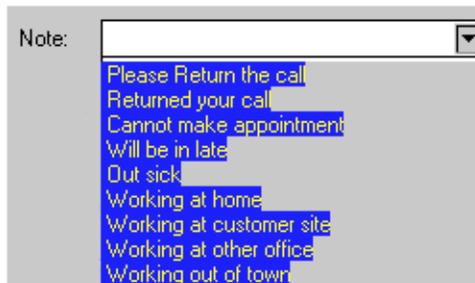
You can select from a list of notes or type a personal note for an extension to appear in the **Notes** column under **Directory** in the Attendant main window.

Note: You cannot change an extension's note unless the Attendant and Server databases are synchronized and, the

Synchronization icon,  , appears on the Status Bar.

To select from the available list of notes:

1. Click an extension number in the **Full**, **Assigned** or **Selected Directory** views.
2. Click the drop down arrow of the **Note** box.



3. Click the applicable note from the drop down list. The note now appears in the **Notes** column under **Directory**.

To type a note:

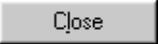
1. Click an extension number in the **Full**, **Assigned** or **Selected Directory** views.
2. Position the cursor in the **Note** box, and type a note.
3. Press **Enter**. The note now appears in the **Notes** column under **Directory**.

Note: For a blank **Note** box, delete what is in the **Note** box then press **Enter**.

To save employee edit changes:

1. Click  in the **Edit Employee Information** dialog box. The changes made to the boxes in the **Edit Employee Information** dialog box for the employee highlighted in the **Directory** list is saved to the database. After clicking **Save**, the **Edit Employee Information** dialog box remains open.

To close the **Edit Employee Information** dialog box without saving changes:

1. Click . The **Edit Employee Information** dialog box closes.

Note: If you click **Close** without first clicking **Save**, the **Edit Employee Information** dialog box closes without saving any changes.

Norstar PC Console automatically collects information about incoming calls and tracks how calls are processed. This important information is available through **Reports** to help spot trends and provide answers to questions before they become problems.

Reports provide caller related information that can help to:

- increase sales opportunities
- improve productivity
- lower expenses
- streamline operations

For example, the report Calls by Customer shows how callers from your company's top customers are being handled. It addresses the question of whether calls are being taken by employees or being routed to Norstar voice messaging.

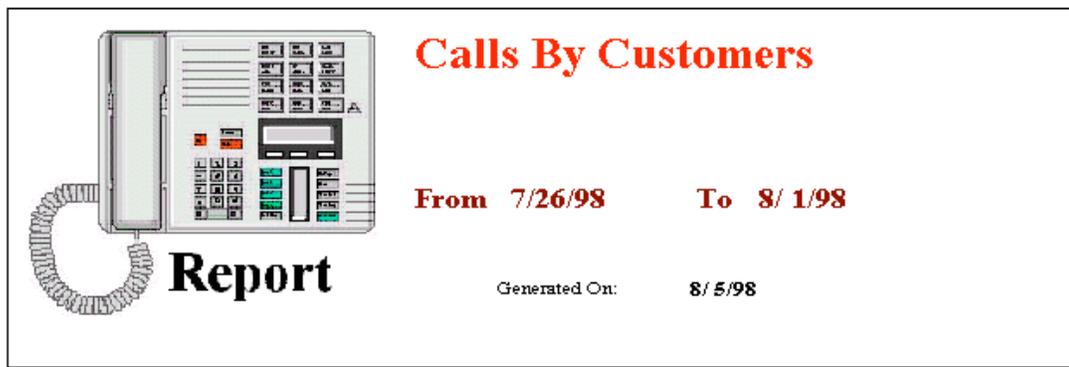
Report types

There are three report types:

- Calls by Customers
- Calls to Employees
- Extension Directory

Calls by Customers report

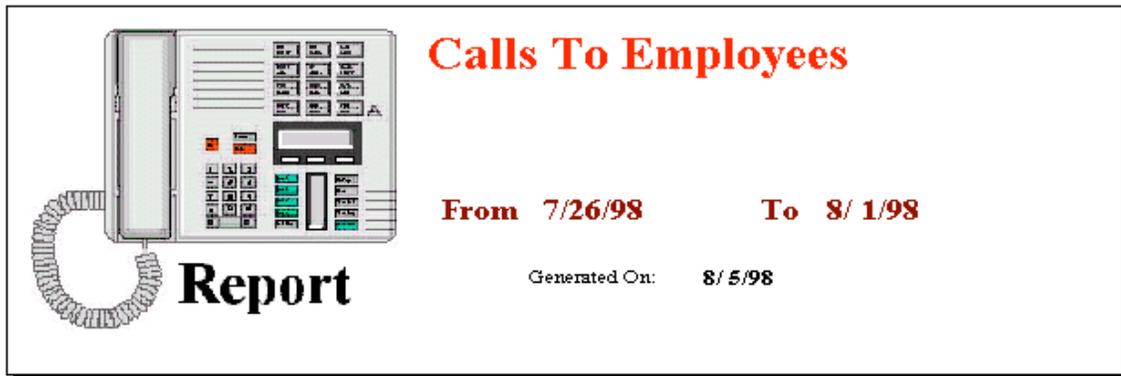
This report shows how calls from your customers are handled by your employees. Each employee report can identify as many customers as necessary. Calls are distributed by destination which shows the number of calls taken by the employee, routed to Norstar voice messaging or handled by others. Of total calls from each customer, the percentage of calls by destination is also indicated allowing review of call taking effectiveness.



Customer	Total	Total%	Taken	Taken%	VMail	VMail%	Other	Other%
Grand Totals		<u>100%</u>						

Calls to Employees report

The Calls to Employee report shows the type of calls employees are receiving over a defined time period. This report can spot caller abuse such as too many personal calls and misdirected calls, such as calls from customers routed to the wrong person/department. This report displays the type of caller across the top and employee(s) down the left side. Each Caller Type has a column for number of calls and percent. Total of all calls and percent is shown separately.



EmployeeName	Unk.	%Unk.	Cust.	%Cust.	Vendor	%Vend.	Emp.	%Emp.	Pers.	%Pers.	Total %Total
Totals											100%

Extension Directory report

Extension Directory shows a listing of all employees that are in the Norstar PC Console database along with the information in their call record.



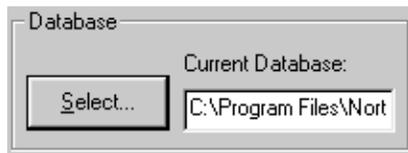
Name	Department	Extension
------	------------	-----------

Working with the Reports window

You can get to the Norstar PC Console **Reports** window by clicking on **Tools** on the Attendant main menu and then choosing **Reports**. The **Reports** window consists of **Database**, **Information**, **Period** and **Employees** group boxes and a report viewing area. The menu bar across the top of the **Reports** window includes standard **File**, **Edit**, **View** and **Help** menus.

With the **Create Report**, **Page <, Page >** and **Print** buttons you can define the type of report you want to create. You can manipulate the preview image once a report is created.

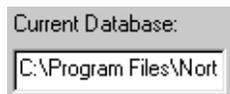
Database group box



This group box contains information on selecting a database.

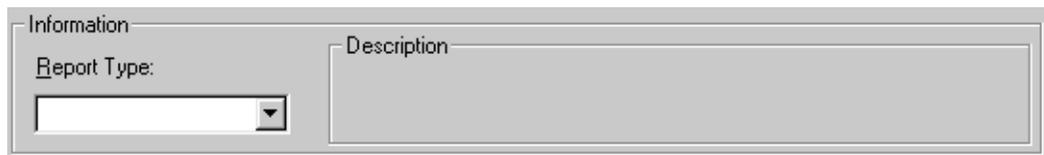


Clicking **Select** accesses the **Open** dialog box from which you can select a Microsoft Access database. For more information about databases and how to locate the database (.mdb) file, refer to [Selecting the database on page 74](#).



You can type the path-name of a Microsoft Access database in the **Current Database** edit box.

Information group box



The **Information** group box contains the report type information.



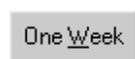
The **Report Type** is active and available when a valid Microsoft Access database is set in the **Current Database** edit box.



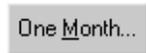
When a report type is selected, a description of that report type appears in the **Description** area.

Period group box

Note: The **Period** group box is active provided a valid database is selected and a Report Type is selected that requires a Report Period to be defined.



opens the **One Week** dialog box from which you can specify a report period with a duration of one week (Sunday through Saturday).



opens the **One Month** dialog box. This dialog box is intended to allow easy selection of a Report Period consisting of an entire month.

shows the date of the beginning of the report period. The date edit boxes change to reflect dates set by other controls such as the **Month**, **Week**, and **Calendar** buttons. The dates in the edit boxes are checked to maintain the general rule that the From date must come earlier than or be the same as the To date. If this rule is broken, an error message is displayed.



opens up **Calendar** dialog boxes for use in quickly setting the From and To Report Period Dates. The **Calendar** dialog box is designed to resemble the Calendar dialogs used in other applications for Windows operating systems. The **Calendar** buttons are active provided a valid database is selected and a Report Type is selected that requires a Report Period to be defined.

Employees and customers group boxes

You can use these boxes to choose customers or employees for which a report is to be generated.

All and Select option buttons



The **Customer** and **Employees** group areas contain:



used to generate a report that includes data for all members of the selected category (Employees or Customers).



used to generate a report that includes data for only those members listed in the list box. If you click **Select**, the button beneath the selection list box (labeled either **Customer** or **Employee**) becomes available so you can make your selection.

Note: The **All** and **Select** buttons for Employees or Customers is only available if a valid database is selected, the report period is set, and a Report Type was chosen which utilizes the category (Employees or Customers).

list box

only displays information if you have chosen to select a subset of the customers and employees in your database. If you choose **All**, the list box remains blank. The list box cannot be directly edited. If the selected list is long enough, it can be scrolled to view its contents. Changing the contents of the list is done with the button below the list box.

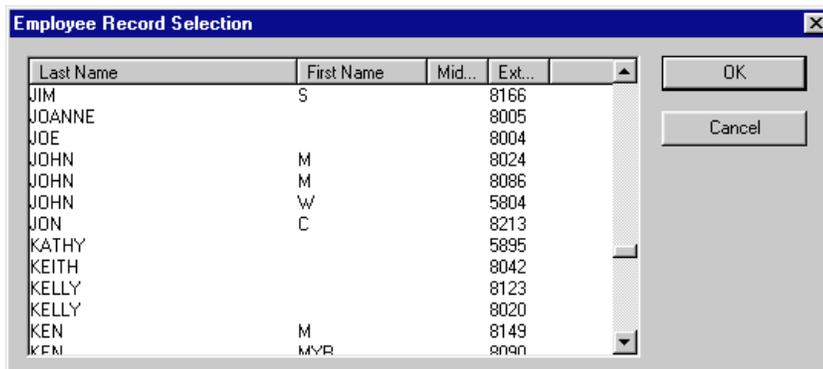
Customer/Employee button

access directories. The **Employee** and **Customer** buttons are only active when you choose **Select**. Clicking on these buttons display either the **Employee** or **Customer Record Selection** dialog box from which you can make your selection.

Note: These buttons are available only if a valid Database has been chosen, a Report Period has been given (if required), a Report Type which involves either Employees or Customers has been selected, and the **Select** option button for the category has been chosen.

Customers and Employees Selection dialog box

The **Customer** and **Employee Selection** dialog boxes are where you can choose which Employees or Customers to include in a report.



The program records which items were selected in this dialog the last time you created a report. When the dialog opens, any items which were selected last time appears as selected. In this way, the list of selected items can be modified.

Creating and viewing reports

The Reports program is designed to make it easy to generate quality reports for analyzing telephone usage at your organization. The following section provides the steps required to generate reports, including:

- selecting the Database
- selecting a report type
- setting the report period
- selecting employees and customers
- creating and previewing the report
- printing the report

Selecting the database

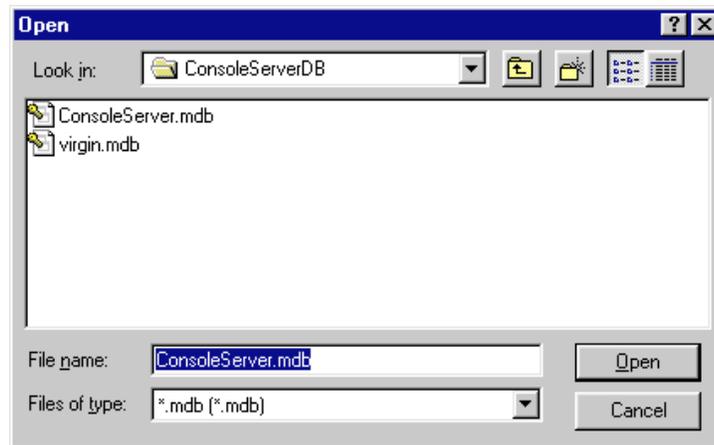
Norstar PC Console stores information about telephone usage in your organization in a special database. This database is used to generate the different types of reports. In most cases, you will want to use the database that was installed with the Norstar ICS system. However, if you make backups of the database for archiving purposes, Reports can use those backups as well. If you are generating reports from a PC that does not have the database stored, locate the database on the server PC through Network Neighborhood. Check with the system administrator to ensure that the database is a shared file.

There are two methods of selecting a Microsoft Access database for reports from the **Reports** window:

- using **Select** in the **Database** group box
- using the **Current Database** box

To point to a database using **Select**:

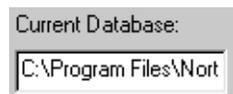
1. Click **Select**. The **Open** dialog box appears.
2. Click the **Look in** box.
3. In the drop-down list, locate and click **Hard drive (C:)**, then click **Program Files**.
4. Double-click the following folders: **Nortel**, **Norstar PC Console**, **Server**, and **ConsoleServerDB**.
5. Click the filename **ConsoleServer.mdb**.



6. Click **Open** to connect to the selected file name. If this file is not a valid database, an error message appears.

To point to a database using the **Current Database** box:

1. Enter the path name of the database in the **Current Database** box: **C:\Program Files\Nortel\Norstar PC Console\Server\ConsoleServerDB\ConsoleServer.mdb**.



2. Press **Enter**. If this file is not a valid database, an error message appears.

Selecting a report type

Once a database has been selected, the next step is to decide what type of report to produce.

To select a report type:

1. Click the **Report Type** drop-down list box.
2. Select your report.

Setting the report period

Some reports require a report period. The report period defines the time span for which data is considered. If the report type chosen does not require a report period, the **Period** group box is inactive. The report period begins on the From date and ends on and includes the To date.

To enter the From and To dates:

1. Click on the **From** box and enter the date. The following are acceptable date formats.
 - June 5, 1997
 - 6/5/1997
2. Press **Enter**.
3. Repeat for the **To** box. Press **Enter**.

Note: If a date is typed in an unrecognized format, or if a typed date does not exist, an error message is displayed.

To cancel out of the **From/To** boxes:

1. Press **Tab** or **Esc**.

To specify a report of one week:

1. Click on . The **One Week** dialog box appears. Choose the month that the desired week started or ended in from the month drop-down list.
2. Select the year the week occurred in the year box. You can either type in the year box or use the increment and decrement arrows to the right of the year box.
3. Select a week from the list of weeks in the box at the bottom of the dialog. Either click on a week and click **OK** or double-click the desired week. When a week is selected, the start and end dates of the week appears in the **From** and **To** date edit boxes.

To specify a report of one month:

1. Click . The **One Month** dialog box appears. Choose the desired month from the month drop-down list.
2. Set the desired year, using the year control, either by typing it in or adjusting its value with the increment and decrement arrows to its right.
3. When done, click **OK** to accept the month, or **Cancel** the Report Period selection.

If a month was selected, the starting and ending dates of the month appears in the **From** and **To** date edit boxes, respectively. Dates for February automatically account for leap-years, centuries, and millennia.

To cancel a selection you made, press the **Esc** key or click **Cancel**. The **Period** group box information is not changed.

Clearing a date

A date can be cleared by deleting the contents of the edit box. A cleared edit box does not count as a date, and thus does not restrict the range of the other date by the above mentioned-rule.

Note: The **To** and **From** date edit boxes are active provided a valid database is selected and a Report Type is selected that requires a Report Period to be defined.

Selecting employees and customers for the report

Some report types, especially those dealing with call data, allow you to choose sets of employees, customers, or both, for which the data are summarized in the report. Reports make only those categories available which are appropriate to the report type you chose. If your Report Type does not need or allow these selections, the **Employees** and **Customers** selection areas remain inactive and you can move on to the next step.

To select the **Employees** or **Customers**:

1. Click on either **Employees** or **Customers**. This displays the **Employee** or **Customer Record Selection** dialog box.

Note: The first time you click one of these buttons after connecting to a database, a wait cursor appears while Reports builds the directory. Afterward, and whenever the button is clicked, a pause follows while Reports creates and fills the dialog box. This pause is to be expected, especially for large directories. After the pause, the **Selection** dialog box appears.

2. The **Selection** dialog box consists of a list of Employees or Customers. For Customers, the list consists of a single column, the Customer's Company Name. For Employees, it consists of several columns, such as last, first and middle names, and telephone extension. These columns can be resized by dragging the column header edges in the bar at the top of the list.
3. You can choose either a single item or multiple items. Selected items appear with a blue background running behind their boxes. Choose a single item by pointing and clicking on it. Choose multiple items by holding down the **Control** key while selecting the items you want. Up to 100 items can be selected from the list. If you require more than 100 items, consider doing several reports with different selection lists, or using the **All** button.
4. Click **OK**. The **Customer** or **Employee Record Selection** dialog box closes and the related **Selection** list box displays only those items selected from the dialog.

Create Report button

When all the data needed to create a report has been provided in the other report controls,

 becomes available.

To create a report:

1. Click . This starts the report generation process.
2. The Reporting Animation icon, just to the left of the button, begins moving, indicating that the report is running. The animation continues until the report is completed.

Note: While it is running, the application cannot be closed. If you need to close the application while a report is running, this can be done from the **Close Programs** dialog box available from the Windows Task Manager. Refer to Windows Help for information about how to force programs to close.

3. Once the report is completed, it is displayed in the **Report Viewing** area below the Report controls.  becomes unavailable again, indicating that the report has been created. The Report controls are disabled and the keyboard functions only in the **Report Viewing** area. You can re-access the Report controls by pressing the **Tab** key.

Viewing the report you generated

Once a report has been created, the **Page** buttons,  and , become available.

The **Next Page** button  shows the next available page of the report, if there is one, in the report view. The **Previous Page** button , shows the previous page of the report, if there is one.

The page number of the current page appears in the report itself, found in the lower right hand corner of each page.

You can also change the displayed report page from the keyboard.

To change the viewed page from the keyboard:

1. The keyboard should be active in the **Report Display** area which is the lower half of the **Norstar PC Console Reports** window. This is set automatically after creating report, but can also be done by pressing **Tab** to cycle through the Report controls. The **Report Viewing** area is treated as the last control in the **Tab** order sequence.
2. Press **Ctrl + Page Up** to view the previous page, or **Ctrl + Page Down** to view the next page.

Printing a report

Once a report has been created and is in the **Report Viewing** area,  becomes available.

To print a report:

1. Click . This prints the report to the default printer. The default printer can be changed from the Printers folder. It can be reached from either the Windows Start Menu or the Windows Control Panel. Refer to PC Console Help.
2. A dialog opens allowing you to choose the pages and number of copies of the report to print.
3. Click **OK** and the report begins printing. Clicking **Cancel** cancels it.

Note: If a Report Parameter is changed in one of the Report

Controls,  again becomes active and

 becomes inactive. Do not change any Report Parameters before printing the report. If you do, you have to generate the report over again and then print it.

Glossary

Assistant attendant

The assistant attendant is the telephone attendant who provides call coverage for specific employee(s).

Backup attendant

The Backup attendant receives calls when the main attendant is not available. The main attendant uses the **Out** button on the Attendant main window to direct calls to the backup attendant.

BLF

This is one of the **Directory** list tab views. It displays only the phone status and extensions of the employees.

CF

Call Forward

Caller ID

Caller ID is also known as CLID or Calling Line Identification and is provided by your telephone company. When Caller ID is in place, the caller name and number are displayed on incoming calls.

CO

Central Office

CTA - Computer Telephony Adapter

A CTA is the hardware device used to connect a PC to the Norstar ICS, and includes the CTA 100, an external device, and the CTA 150i which is installed in a PC hard drive.

Destination extension

The destination extension is the person's extension to which a caller (or attendant) is attempting to connect.

DND

Do not disturb

DTMF - Dual Tone Multi Frequency

DTMF is the sound emitted when telephone buttons are pressed.

External call

External call is a call originating from outside your company's voice mail system.

ICS - Norstar Integrated Communications System

ICS is the Norstar key system that Norstar PC Console is connected to. Two types of Norstar ICS are Modular ICS (MICS) and Compact ICS (CICS).

ID

Identification

Internal call

An internal call is a call that originates from your company's Norstar ICS, such as another employee's extension.

Hookflash

This is the signal that occurs when a telephone goes on-hook followed by off-hook.

Hunt Group

A Hunt Group is a group of telephones that can be all called by a single number. Hunt Groups are configured in your Norstar ICS.

LAN

Local area network

Main attendant

A main attendant is the telephone attendant primarily responsible for managing a company's incoming calls that may or may not have other attendants to assist.

Networked model

Networked model is a way of setting up a Norstar PC Console system in which the main attendant's PC is connected to one or more additional attendant PC(s) through a network.

Norstar PC Console

Norstar PC Console is a Windows based software product that provides call management and call activity reporting capability to a business.

Norstar ICS

Norstar Integrated Communication System. The telephone system that Norstar PC Console works with. The two types of Norstar ICS systems are the Modular ICS and the Compact ICS.

Overflow attendant

The overflow attendant receives incoming calls when there are more than six active calls at the main attendant's PC.

PC

Personal Computer

Server program

The Norstar PC Console Server program supports the Attendant program residing in the PC.

Shared system

A shared system is a Norstar PC Console system in which the Norstar ICS is shared by two or more companies.

Stand-alone model

A stand-alone model is a Norstar PC Console system in which one attendant only manages a business's incoming calls. There are no assistant attendants, backup attendants or overflow attendants in a stand-alone model.

Target extension

A target extension is the extension number to which you are directing a call.

VM

Voice mail or voice messaging.

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