Allworx® Call Assistant 2.5

Quick Reference Guide

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Allworx® Call Assistant 2.5

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Chapter 1   Introduction

The Allworx Call Assistant™ application is a fully-integrated PC software tool that:

- provides graphical information to individuals in the role of an operator or receptionist.

- enables monitoring the state of every line in the system and dispatch calls by answering, transferring, parking, or sending the calls to voicemail.

- enables using the phone keys, if that is more convenient.

The Call Assistant application does not provide voicemail support such as voicemail indicators or the ability to retrieve a voicemail message.

1.1   Who Should Read This Guide

Allworx users of the Call Assistant application.

1.2   Guide Purpose

The purpose this guide is to advise users on the installation, set up, and operation of the Call Assistant application.

1.3   Equipment Requirements

The table below indicates a list of all equipment and requirements necessary to perform all operations identified in this chapter.

Equipment	Requirements		
PC	• Running OS described below:		
	• Windows 7 32-bit SP1	• Windows 8 64-bit	• Windows 10 32-bit
	• Windows 7 64-bit SP1	• Windows 8.1 32-bit	• Windows 10 64-bit
	• Windows 8 32-bit	• Windows 8.1 64-bit	
	• RAM minimum: 2 GB • Monitor resolution: 1024 x 768 (XGA) • Call Assistant application • Allworx username and password		
Allworx server	• Allworx Server Software Version 7.3, 7.4, 7.5, 7.6 or 7.7 • IP Address or DNS name Allworx server • Feature key for Call Assistant		
Allworx IP phone			

Chapter 2   Setup

To use the Call Assistant application, users must know their My Allworx Manager username and password as well as the Allworx server IP address. Contact the Allworx administrator for this information.

2.1   Installation

1. Contact the Allworx administrator for the latest download version of the Call Assistant application.

2. Double-click the Call Assistant 2.5 icon. The Call Assistant Setup Wizard dialog box opens.

3. Click **Next** to proceed.

4. Accept the End-User License Agreement, and click **Next**.

5. Click **Install** to start the installation.

6. Click **Finish** to launch the application.

2.2   Log in

1. Launch the Call Assistant application.

2. Enter the My Allworx Manager username, password and the Allworx Server IP address.

    If the IP address is unknown, click the **Search** button.

    If using a Remote phone, check the box and enter the Plug-N-Play Key. Contact the Allworx administrator for this key.

3. Click **Login**. The application opens.

Chapter 3   Windows

The Call Assistant application has three distinct windows: My Calls, Switchboard, and Outside Lines (if applicable). Each view displays call information and expedites call handling. When receiving an incoming call, the phone rings and the call displays in the My Calls window.
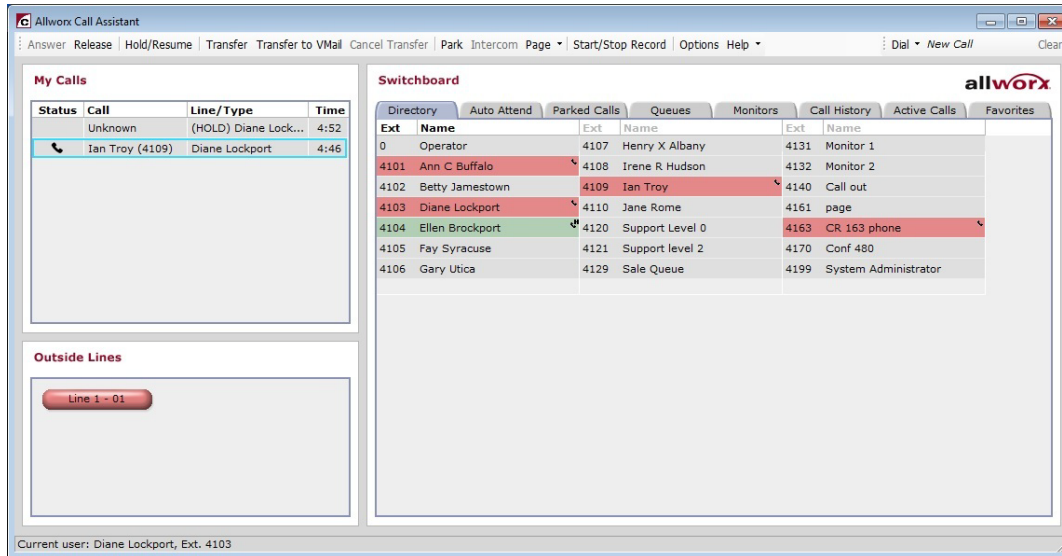
Note:	To resize the Call Assistant application window or individual windows, place the mouse on the window boundary, and then click and drag to the preferred size.

To answer the call:

•   Double-click on the call.

•   Click on the call, and then click the Answer button in the toolbar.

•   Right click on the call, and then select the Answer option.

3.1   My Calls Window

The My Calls Window displays all calls that ring the programmable function keys (PFK) or Call Assistant Appearances of a user's phone including Call Appearances, Line Appearances, Queue Appearances, ACD Appearances, and Call Monitors. The calling order places the oldest calls at the top of the view.

The My Calls View displays:

Display	Description
Status	The phone icon displays, if the call is: • Ringing – • Active – • Being Recorded – • On Hold– *(blinking)* • Ended –
Call	Displays Caller-ID information such as name and number, if available.
Line/Type	Displays the Line or Call Appearance that the call came in on or when out on and information such as that the call is on hold
Time	Displays the elapsed time of the call.

Note:	To change the column width for each field, click on the boundary line between the field names and drag to a new position.

Users can initiate the following actions on calls with a right-click:

| Feature	Description
Answer	Pick up the current call.
Release	End the current call.
Hold/Resume	First click places the current call on hold, second click reconnects the caller.
Transfer	Send the call to another number.
Transfer to Vmail	Send the call directly to the voicemail of the dialed extension.
Park	Place the call into the parking orbit.
Dial Additional	Enables using the dialpad while on a call.
Start/Stop Record	First click begins recording the current phone call conversation, second click ends the recording.

3.2   Switchboard Window

The Switchboard window displays the Company Directory, Auto Attendants, Parked Calls, Call Queues, Call Monitors, Call History, Active Calls, and Favorites in a tabbed format.

3.2.1   Directory Tab

The Directory tab displays all extensions configured in the Allworx directory. Each box displays the Caller ID extension number and or description. Use the Directory tab to dial, answer a ringing call or transfer calls to the listed extensions.
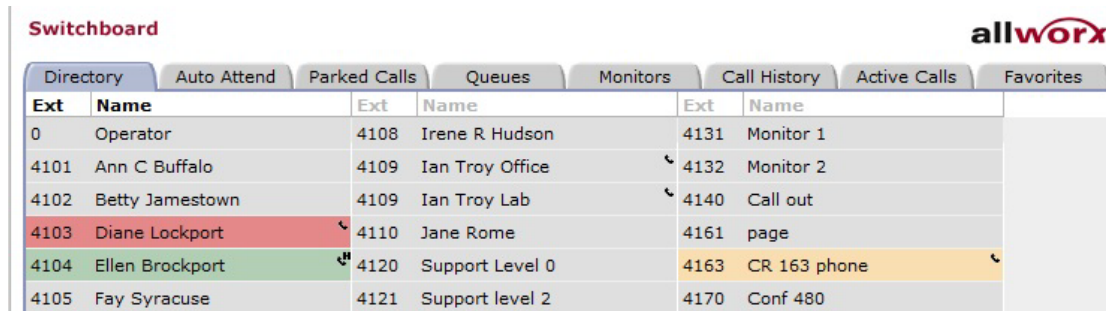
Extensions display phone icons ☎ when assigned as the internal caller ID of an Allworx IP or analog handset. The hot desk phone icons ⇄ display for users logged into Allworx IP handsets and removes the phone icon from the user's original extension entry. For extensions assigned to more than one handset, entries display for each of the handsets. In the above example, there is an entry for both Ian Troy's office phone and his lab phone.

The PFK color indicates the current status of each Allworx IP or analog handset:

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

Note:	Extensions for non-Allworx handsets are always gray.

Each entry displays the following mouse fly-over hints:

- Handset state (extensions assigned to Allworx IP and analog handsets only)
- Extension
- Name (or description)
- Presence (user extensions only)

3.2.2 Auto Attend

The Auto Attend tab displays all Auto Attendants configured on the Allworx system. This enables transferring calls by selecting the Transfer icon on the toolbar, and then the preferred Auto Attendant extension.

3.2.3 Parked Calls

The Parked Calls tab displays all calls currently in the Parking Orbit. Pick up the parked call by double-clicking on it.

3.2.4 Queues

The Queues tab displays all the Call Queues with the corresponding descriptions and distribution mode. The user can observe the number of calls currently waiting in each queue and the duration of the longest waiting call or pick up a queued call by double-clicking on the queue.

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

3.2.5 Monitors

The Monitors tab displays the number of calls currently in each monitor and enables answering any call by double-clicking on the monitor.

3.2.6 Call History

The Call History tab displays all of the user's previous calls including completed calls, missed inbound calls, and unanswered outbound calls. If the Caller-ID is available in the call History record, double-click the entry or use another dialing method to call the number. Only completed calls display while the Call Assistant application is open.

3.2.7 Active Calls

The Active Calls tab displays active calls on the Allworx system. When the information is available, the active call information includes: start time, duration, originating caller ID and destination caller ID.

3.2.8 Favorites

The Favorites tab behaves similarly to the Directory tab but with the ability to choose which extensions to display and the ability to add external numbers. The Favorites tab can include any of the following items:

- User Extensions
- System Extensions
- System Speed Dial Numbers
- Auto Attendants

- Call Queues
- Call Monitors
- Custom External Phone Numbers

See "Favorites Selections" on page 15 to identify favorites.

3.3 Outside Lines Window

If the handset configuration on the Allworx server is set up for Line Appearances, the Outside Lines window displays the available lines. To place calls using the outside lines, click the preferred outside line button and enter the number on the dial pad pop-up window. The line button displays the status:

Color	State
Green	Ringing
Red	Active
Gray	Inactive

Chapter 4   Product Features

The status of the currently selected call in the My Calls window or the Call History tab enables or disables the toolbar options. To activate any of the call options on the Call Assistant toolbar, select a call. The selected call has a blue border.
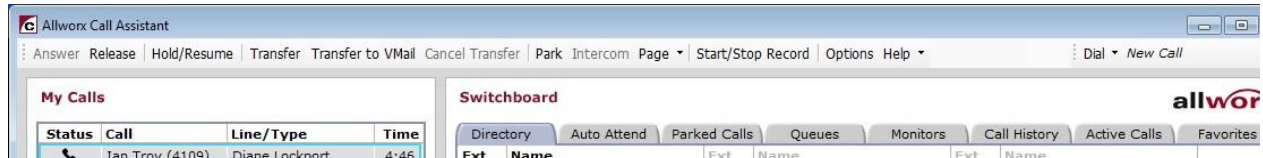
Figure 1: Inbound call unselected

Figure 2: Active call selected

Users can also access the application features by selecting a call, and then right-clicking. The available features display.

4.1   Toolbar

4.1.1   Answer

An inbound call displays in the My Call view as ringing. To answer the call, select the ringing call in My Calls view, and then click Answer on the toolbar.

4.1.2   Release

End or drop the selected call in My Calls view.

4.1.3   Hold/Resume

To place a call on hold or to resume a call:
1.   Select a call in the My Calls window.

2.   Click **Hold/Resume** in the Call Assistant application toolbar. The telephone icon blinks, which indicates the call is on hold.

3.   Click **Hold/Resume** again to make the call active. The telephone icon stops blinking, which indicates the call is no longer on hold.

4.1.4   Transfer

Users can transfer calls to another extension.

Option	Description
Blind	Send the call unannounced to a new extension.
Attended	Send the call announced to a new extension.

To do a blind transfer:
1.   Select a call in the My Calls window.

2.   Click **Transfer** on the Call Assistant application toolbar.

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

Note:	Alternative, drag the call to the destination on one of the Switchboard window tabs.

The call status changes to "Ended" in the My Calls view and removes the call from the view.

To do an attended transfer:
1.   Select a call in the My Calls window.

2.   Click **Hold/Resume** on the Call Assistant application toolbar.

3.   Dial or intercom the targeted extension, and announce the call.

4.   Select the targeted party and click **Hold/Resume** in the Call Assistant toolbar.

5.   Navigate to the My Calls view and select the original call (on hold) to transfer.

6.   Click Transfer on the toolbar.

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

       The My Calls view no longer displays the call, and the targeted extension call status changes to Ended which removes it from the My Calls View.

4.1.5   Transfer to VMail

To transfer a caller to voicemail:
1.   Select a call in the My Calls window.

2.   Click **Transfer to VMail** on the Call Assistant application toolbar.

3.   Select the targeted Caller ID in the Switchboard window.

4.1.6   Cancel Transfer

After selecting a Transfer or Transfer to Voicemail, selecting this option terminates the transfer operation to resume the call.

4.1.7   Park

The Park option places a call on hold to one of the designated parking extensions (701 through 709)[1]. Any handset in the system or the Call Assistant application using the Park tab can retrieve the parked calls.

4.1.8   Intercom

Use Allworx phones on the same system as intercoms by using the Intercom option.

1.   Select the targeted extension in the Switchboard window > Directory tab.

2.   Click **Intercom** in the toolbar. The phone announces the connection by ringing.

3.   Begin speaking. The person you called hears you over the speaker.

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

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1.   Extensions may vary per system.

4.1.9   Page

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

To broadcast a message to any of the Allworx system paging zones:
1.   Click the **Page** drop-down arrow in the Call Assistant application toolbar.

2.   Select one of the paging zones. The broadcast goes to the extensions assigned to that paging zone.

        Clicking the Page button instead of using the drop-down list sends a page to the first paging zone in the list.

4.1.10 Start/Stop Record

Record and save calls as WAV files. Play the recordings in Windows Media Player or other popular media player programs. Save each recording in a folder named Recorded Calls in the user's My Documents folder. File names are the date and time of the recording.

•   **Start Recording** - To record the selected call in the My Calls view, click the Start/ Stop Record option. A red, flashing dot displays next to the phone icon to indicate recording the call is occurring.

•   **Stop Recording** - To stop recording, click the Start/Stop Record toolbar option. The red, flashing dot no longer displays next to the phone icon to indicate recording has stopped. Recording stops automatically if releasing, parking, or transferring the call. It is possible to pause the recording by selecting the Stop/ Stop Record option. To restart the recording, select the Start/Stop Record option again. Recording pauses when placing the call on hold. To restart recording after resuming the call, select the Start/Stop Recording option again. The application inserts a beep into the audio file each time the user resumes recording.

4.1.11 Options

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

Note:	A recording in progress disables the 3-way Conference calling. Conversely, a Conference call already in progress hosted by the Call Assistant user prevents recording. However, users can record conference calls set up using the Conference Center or 3-way Conference calls hosted by one of the other participants.

4.1.11.1   Call Recording Options

To set the following options for Call Recording:
1.   Navigate to **Options** > **Call Recording Options** in the Call Assistant application toolbar**.**

2.   Update the Call Recording options.

   a.   Audio File Folder - click **Browse...** to change the current location.

   b.   Audio File Compression Format - click the radio button ti select G.711 u-law or PCM.

   c.   Recording Volume - user the slider to adjust or click **Default** to use the application default setting.

3.   Click **OK** to save the changes.

4.1.11.2   Switchboard Options

Enable or disable the tabs displayed in the switchboard view. The default view displays all tabs. Users can enable or disable the Dialpad display from this option.

To enable or disable the tabs:
1.   Navigate to **Options** > **Switchboard Options** in the Call Assistant application toolbar.

2.   Check the box next to the tabs or dialpad. If unchecking a box, the application no longer displays the tab or dialpad.

3.   Click **OK** to save the changes.

4.1.11.3   Favorites Selections

Users can add or remove items displayed in the Favorites tab. The default displays no items.

To add or remove items:
1.   Navigate to **Options** > **Favorites Selections** in the Call Assistant application toolbar**.**

2. Select the extensions.

   a. **System Extensions** - check the box next to the Caller ID number and
      name.

   b. **Other Phone Numbers** - add the Name and Phone Number in the
      appropriate column, respectively. Click **Add**.

3. Click **OK** to save changes.

4.2   Dialing Calls

The Call Assistant application can do various dialing functions:

4.2.1   Place a New Call

To place a new call:

- Click the Dial button and enter digits into the Dial Pad. Follow the dialing rules
  (e.g. entry of PIN Codes).

4.2.2   Dial an Extension

To dial an extension:

- Double-click the Caller ID the Directory or Favorites tab.

- Select the Caller ID in the Switchboard window, and click the **Dial** button in the
  Call Assistant application toolbar.

4.2.3   Dial a Previous Caller

To dial the number of a previous call:

- Double-click on the entry in the Call History tab.

- Locate and select the entry in the Call History tab, and then click the **Dial** button.

4.2.4 Place a new Call on a Specific Outside Line

Note:	This features requires that the handset configuration on the server includes one or more Line Appearances.

This feature does not require the need to dial the outside line access number.

1. Navigate to the Outside Lines window.

2. Select an outside line button to place a new call. The dialpad displays.

3. Enter the number into the dialpad.

4.2.5 Dial Digits in an Existing Call

Use this option for navigating within an Auto Attendant or within the Message Center.

To dial digits during a call already in progress:
1. Right-click the call, and then select **Dial Additional** from the menu.

2. Enter the number into the dialpad.

4.2.6 Copy & Paste digits in the Dial Pad

The Dial Pad supports the copy & paste function of valid phone digits (0-9, #, *) from the clipboard and removes the invalid characters. The phone receives the valid digits, one after another, as if typing into the Dial Pad. A right-click on the Dial Pad offers the option to paste "as-is" or append the number to seize an outside line to the beginning of the dialing number (Nine (9)[1], in the default internal dial plan).

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1. Extensions may vary per system.

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