Receptionist User Guide

XO Hosted PBX

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About this Document

This document is the User Guide for the Receptionist feature of XO Hosted PBX. You can use it to leanr about the features of the Receptionist client and how to use it in your organization.

What is Receptionist?

Receptionist is a telephony attendant console used with the XO Hosted PBX service. It is typically used by "front-of-house" receptionists or power users, who screen inbound calls for enterprises.

The Receptionist service is delivered via a web-based client. See Appendix C for a detailed list of requirements to run Receptionist.

XO Hosted PBX offers the full-featured Enterprise Edition of the client. It supports the full set of call control options, large-scale line monitoring, queuing, multiple directory options, and views, Outlook integration, and other features required in large or distributed organizations.

Getting Started

Start your web browser and navigate to

https://apps.xo.bizcommservices.com/receptionist/

Your user credentials will have been assigned by your administrator. Typically they are of the form phone_number@domain, for example 5551112233@bizcommservices.com. The password is the same password as you would use to sign into the MyPhone portal.

- Your screen must use a resolution of 1024x768 or better.
- Do not attempt to sign in as different users from the same machine at the same time – this is unsupported.
- You may safely ignore the options pane.

Check *Stay signed in* to instruct the client to automatically connect and sign in to the server when it detects a network connection. This is good practice to help mitigate any intermittent network issues.

User Interface

Figure 1 shows the main interface of the Receptionist Enterprise client.

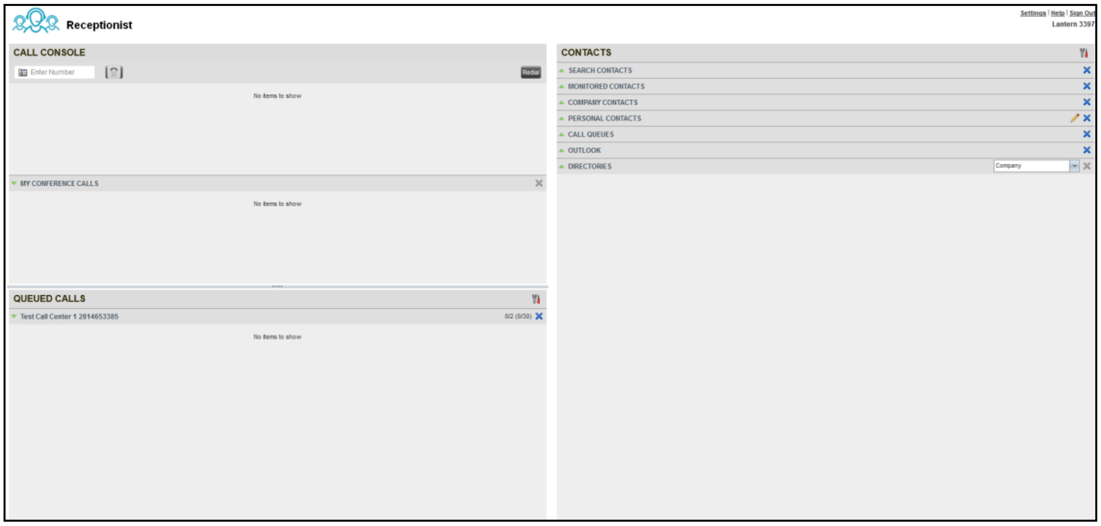


Figure 1 Receptionist Enterprise Main Interface

The interface contains the following work areas:

- **Logo pane** – The *Logo* pane displays links to other pages or functions of Receptionist and provides information about the logged user. It also displays error, warning, and information messages to the user.
- **Call Console** – This is where you view and manage your current calls.
- **Queued Calls pane** – This is where you manage queued calls. You need to have the BroadWorks Supervisor service assigned to have access to this feature.
- **Contacts pane** – This pane contains your contact directories, which you use to make calls to contacts and monitor selected contacts.
- **Settings page** – You use the *Settings* page, accessed via the Settings link, to configure various aspects of Receptionist.
- **Contact Directories**

This following table lists the contact directories available. The *Comments* column specifies additional settings required to access the directory.

Directory Name	Contents	Comments
Monitored Contacts	This consists of the contacts whose phone status you are currently monitoring. The list of contacts to monitor must be configured on the MySite portal.	Monitoring is limited to 100 static contacts within the company.
Company Contacts	This consists of all contacts in your company.	You can dynamically monitor up to 50 contacts in your company.
Personal Contacts	This consists of all contacts that you manually add to your profile in the Receptionist.	
Call Queues	This consists of the Call Queues and associated DNIS numbers that you are staffing as an agent or supervising. It allows you to transfer calls into queues	You need to have Call Queue service assigned.

	quickly.	
Outlook	This consists of all your Outlook contacts.	
Directories	This consists of a configurable view of one or all the contact directories.	You can choose to show the Personal Contacts, Company Contacts, or Outlook directory in this pane. There is also a show all option.

For information on managing your contact directories, see **Manage Contacts**; for information on using your contacts to make and manage calls, see **Manage Calls**; for information on monitoring contacts, see **Monitor Contacts**.

Call Management Functions

The Receptionist Enterprise provides the following call management functions:

Function	Quick Reference
View Call Details	View Call Information
Dial Contact	Dial Contact
Dial Ad Hoc Number	Dial Ad Hoc Number
Redial	Redial Number
Answer Call	Answer Call
Hold Call	Put Call on Hold
Resume Held Call	Resume Held Call
End Call	End Call
Blind Call Transfer	Blind Transfer Call
Supervised Call Transfer	Conduct Supervised Transfer
Consulted Call Transfer	Transfer with Consultation
Transfer to Voice Mail	Transfer to Voice Mail
Transfer to Queue	Transfer to Queue
Group Call Park	Conduct Group Call Park
Directed Call Pickup	**Error! Reference source not found.**
Operator Call Barge-in	**Error! Reference source not found.**
Start Conference Call	Start Three-Way Conference
Hold Conference Call	Hold Conference
Resume Conference Call	Resume Held Conference
Put Participant on Hold	Put Conference Participant on Hold
Take Participant off Hold	Resume Conference Participant
End Participant	Remove Conference Participant

Leave Conference Call	Leave Conference
End Conference Call	End Conference

For more information, see **Manage Calls**.

Get Help

Receptionist provides you with online access to a portable document format (PDF) manual. This version is generic (rather than XO-specific). Click the Help link on the top right of the screen to review that manual.

Sign Out

To sign out of Receptionist, click the *Sign Out* link at the top right-hand side of the main interface. A message appears asking you whether you would like to save your current workspace. Click *Yes* to save your current workspace. This allows you to retain the same setup at your next session.

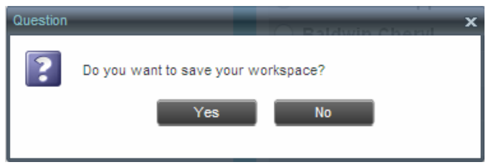


Figure 2 Question Dialog Box

Exploring the Workspace

When you sign in to Receptionist, the main page appears where you perform most of your call management and monitoring tasks. In addition, the main page provides a link to the *Settings* pages, where you configure various Receptionist settings.

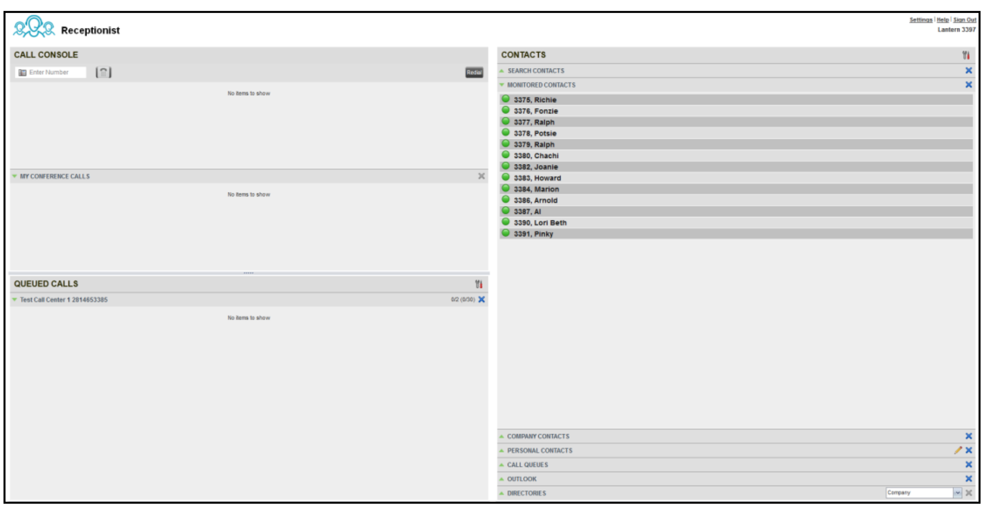


Figure 3 Receptionist Enterprise Main Interface

Many visual aspects of Receptionist are configurable. For example, you can decide which windows should be open and change the size and placement of windows on the screen. You can then save your workspace and retrieve it the next time you log in.

- To work in full screen mode, make sure that the main window is in focus and then press **F11**.

The Back, Forward, and Refresh operations of the web browser are not supported by Receptionist; and if performed, the results are inconsistent.

Most Receptionist controls are context-based, which means that they appear only when the action they represent can be taken. Context-based controls that allow you to take actions on calls are called action buttons.

This section describes the following elements of the Receptionist main interface:

Logo Pane

The Receptionist main page and *Settings* pages contain a *Logo* pane, which displays the Receptionist logo, global messages, links to other interface elements or Receptionist functions, and information about the signed-in user.

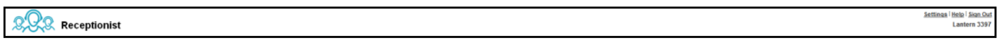
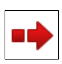
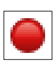


Figure 4 Receptionist Logo Pane

- **Global Message Area**: The *Global Message Area,* that is, the center area of the *Logo* pane, is used by Receptionist to display information, warning, and error messages to the user. A message is displayed for several seconds and then disappears.
- *Settings*, *Help*, and *Sign Out* Links
- The *Logo* pane displays links to the *Settings* pages, where you can configure the client, and the Help and Sign Out links.
- Signed-in User Information: Information about yourself (that is, your name, your phone number, your availability to take calls, and your voice mail status) is displayed at the top right-hand side of the main interface. Information about the following services and features is provided:

  - Do Not Disturb (DND) 
  - Call Forwarding Always (CFA) 
  - Busy Call State 
  - Voice Messaging 

  The information is presented in the form of icons to the left of your name in the following format:

  <DND/CFA/Busy> <Voice Messaging>

  The <DND/CFA/Busy> state is represented by one icon, where Do Not Disturb has precedence over Call Forwarding Always, which has precedence over *your Busy* Call State. If none of the services is enabled and your call state is *Idle*, the icon is not displayed.
  The Voice Messaging icon is present only if you have outstanding voice messages.

Call Console

You use the *Call Console* to view and manage your current calls.

Figure 5 Call Console

Dialer

The *Dialer*, located at the top of the *Call Console*, below the header, allows you to make ad hoc calls.

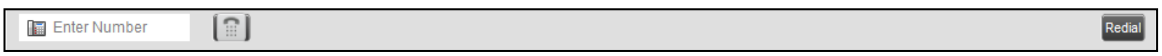


Figure 6 Call Console – Dialer

The *Enter Number* text box is where you enter the number to dial. The buttons to the right, called action buttons, change depending on the context, and allow you to perform operations on calls.

Current Calls

The *Call Console* displays your current calls and allows you to take actions on them.

- If you are involved in a conference call, its details are displayed in the *Conference Call* panel at the bottom of the *Call Console*. The *Conference Call* panel is described in the following section.

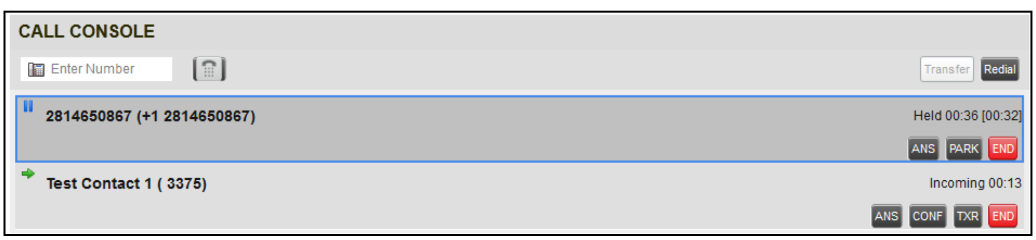


Figure 7 Call Console – Current Calls

Each call is listed on a separate line with the following information:

- Remote CLID – This is the name of the remote party (if available) and the phone number in parenthesis.

  For a recalled call, the following information appears: Recall: <Caller’s name>; via: <Call parked against user>.

- Call State icon – This is a visual representation of the current state of the call.
- Call State name – This is the display name of the state the call is currently in.

- Call duration [Held duration] – This is the duration of the call from the time the call was received reflecting how long the call has been present in the system. In addition, for held calls, the time a call has been on hold is also displayed.
- Action buttons – These buttons are for the operations that you can currently take on the call.

Conference Call Panel

The *Conference Call* panel displays your current conference and allows you to manage your conference calls. You can only be involved in one conference call at a time.

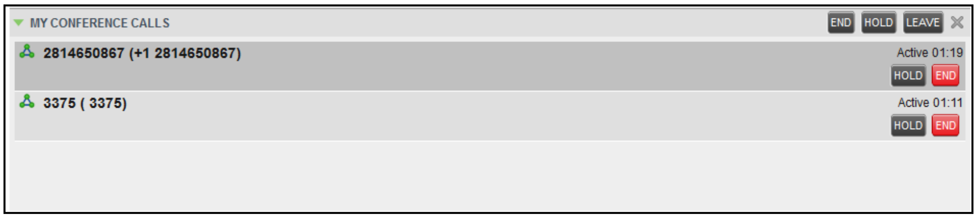


Figure 8 My Conference Calls Panel

The header bar contains various controls that allow you to manage the conference:

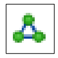
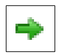
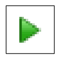
- Hold Conference button HOLD – This allows you to place the conference on hold.
- Resume Conference button ANS – This allows you to resume a held conference.
- Leave Conference button LEAVE– This allows you to leave the conference.
- End Conference button END – This allows you to end the conference.

The panel lists the call legs that make up your current conference. Each two-way call is displayed on a separate line. The information displayed for each call leg is the same as the information displayed for a two-way call.

Call States and Actions

The following table lists the possible call states and actions that can be performed in each state.

Call State	Display Name	Display Icon	Call Personality	Call Actions
Ringing In (Local)	Incoming Local		Click-To-Dial	Answer, End
Ringing In (Remote)	Incoming		Terminator	Answer, Conference, End
Ringing Out, Outgoing	Outgoing		Originator	Conference, End
Active	Active		Any	Transfer, Hold, End, Park, Camp, Conference
On Hold	Held		Any	Transfer, Resume, End, Park, Camp, Conference
On Hold (Remote)	Remote Held		Any	Transfer, Hold, End, Conference

Active (In Conference)	Active		Conference	Transfer, Hold, End
Held (In Conference)	Held		Conference	Resume, Transfer, End
Ringing In (Recalled Call)	Call Recalled		Terminator	Answer, Conference, End
Parked Call	Parked (<DN>)		Any	Answer, End

Contacts Pane

The *Contacts* pane contains your contact directories and allows you to use your contacts to make or manage calls.

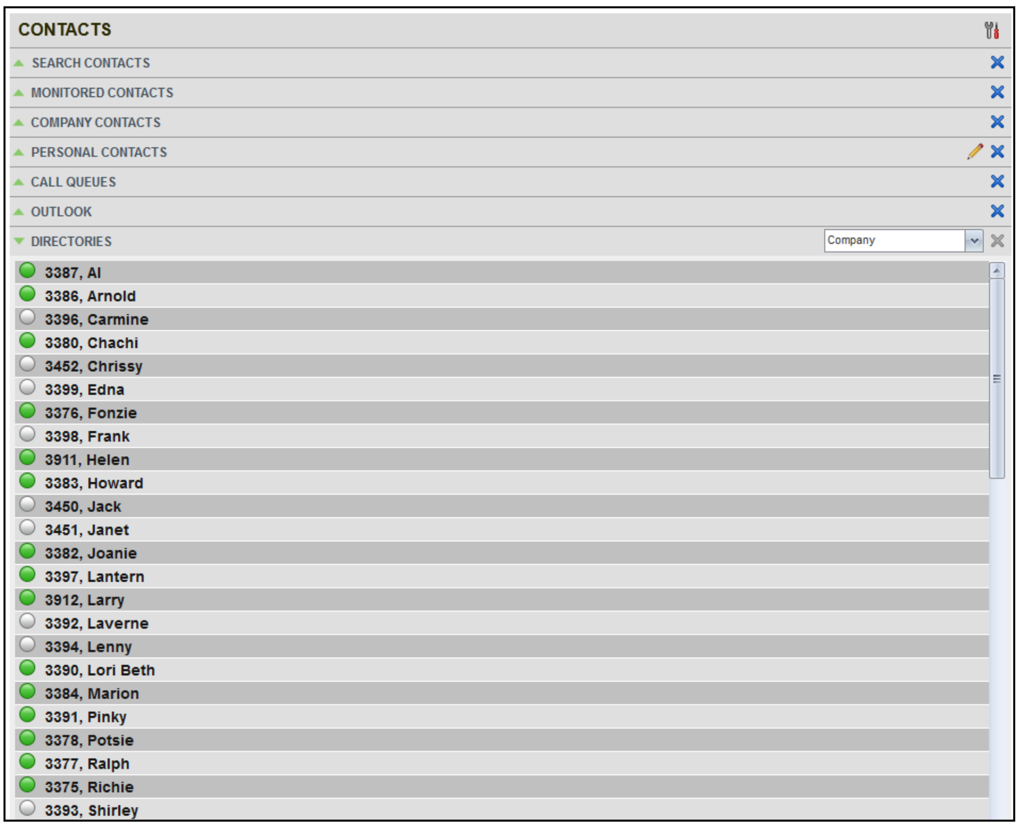


Figure 9 Receptionist Enterprise Contacts Pane

When you click a contact in any contact directory, the contact expands and information about the contact appears as well as the action buttons for the operations that you can currently perform on that contact.

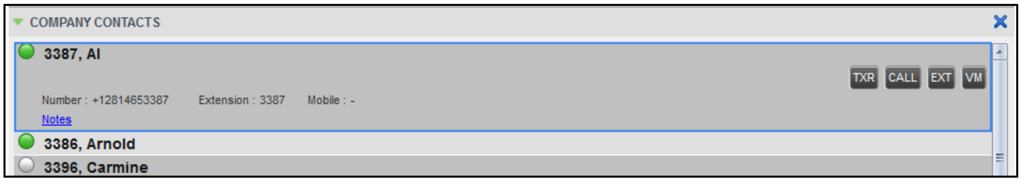


Figure 10 Company Panel – Contact in Focus with Action Buttons

Search Panel

You use the *Search* panel to look for specific contacts in your contacts directories.

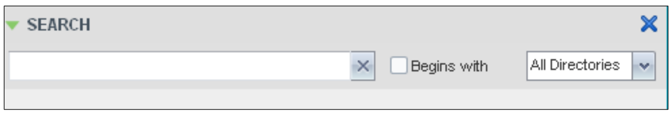


Figure 11 Contacts Pane – Search Panel

Monitored Contacts Panel

You use the *Monitored Contacts* panel to monitor the call status of selected contacts. The contacts to monitor must be configured for Receptionist using the My Site web portal. This is referred to as static monitoring.

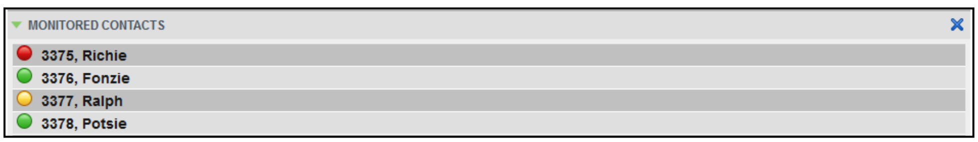


Figure 12 Contacts Pane – Monitored Contacts Panel

Company Contacts Panel

The *Company Contacts* panel contains the contacts in your company directory. You can also monitor selected contacts and view contact details. This is referred to as dynamic monitoring.

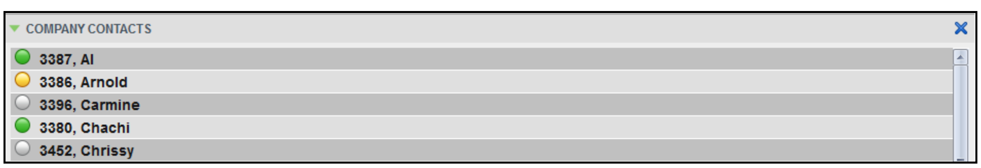


Figure 13 Contacts Pane – Company Contacts Panel

Personal Contacts Panel

The *Personal Contacts* panel contains the contacts from your personal phone list on the BroadWorks web portal. You can edit your personal contacts in Receptionist.

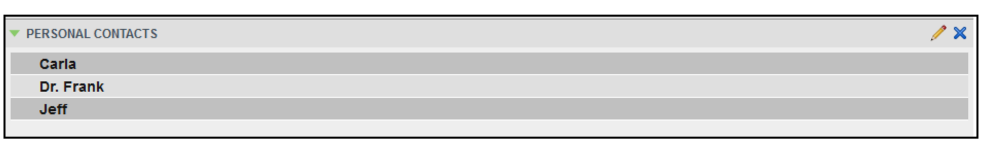


Figure 14 Contacts Pane – Personal Contacts Panel

Call Queues Panel

The *Call Queues* panel displays the list of Call Queues and associated DNIS numbers that a Call Queue agent or supervisor is staffing and/or supervising. The primary purpose of this directory is to provide you with a quick way to transfer calls to queues.

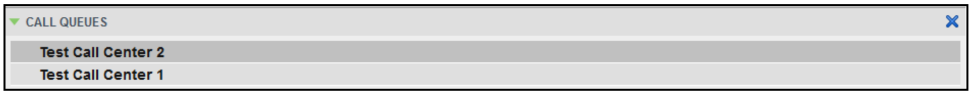


Figure 15 Contacts Pane – Call Queues Panel

Outlook Panel

The *Outlook* panel contains your Outlook contacts.

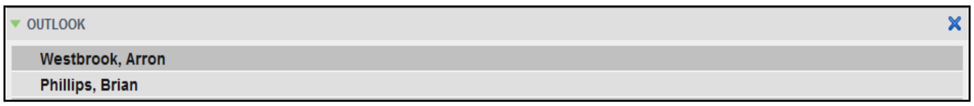


Figure 16 Contacts Pane – Outlook Panel

Directories Panel

The *Directories* panel consolidates the contacts from the following directories: *Company Contacts* directory, *Personal Contacts* directory, and *Outlook* directory. The *Directories* panel is always visible. You can choose which directories to view in the *Directories* panel and you can collapse the panel, but you cannot close it.

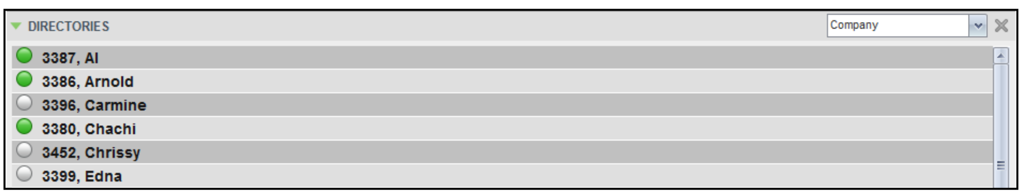


Figure 17 Contacts Pane – Directories Panel

You can also place a copy of a directory below the *Call Console*. This allows you to view more than one directory at a time easily.

Queued Calls Pane

You use the *Queued Calls* pane to manage queued calls in the selected call queues.

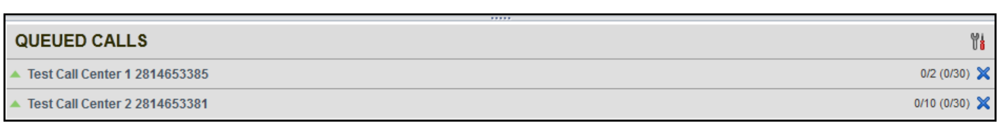


Figure 18 Queued Calls Pane

The pane lists queued calls for the selected Call Queues. Each call queue is displayed in a separate panel. The panel's header displays the following information:

- The name of the call queue.
- The primary phone number of the call queue.

- The number of calls currently displayed for the queue against the maximum number of calls that can be displayed for a queue.
- The number of calls in queue against the queue length.

To monitor a queue, you must be an active participant in the queue to be monitored.

When you expand the panel for a Call Queue, the list of calls queued in that call queue appears, with calls listed according to their position in the queue.

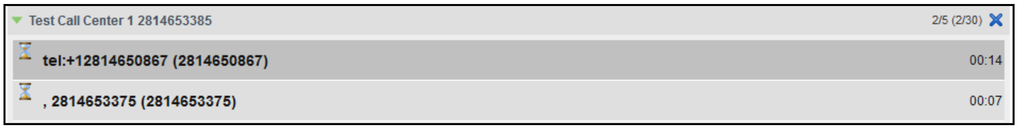


Figure 19 Queued Calls Pane – Call Queue Panel (Expanded)

The following information is provided for each call:

- Call Status icon – A graphic representation of the state of the queued call, which can be one of the following:
  - *Waiting* – The call is queued, waiting to be answered.
  - *Announcement* – An announcement is being played to the caller.
  - *Reordered* – The position of the call in the queue has been changed.
  - *Bounced* – The call has been bounced.
- Name (if available) and phone number of the calling party
- The total call time, including the time in the current priority bucket (in parentheses)

Clicking a call expands the call to show additional data:

- Position of the call in the queue
- Name (if available) and the phone number of the call queue (or DNIS, if applicable) that was called

When you move the mouse over a queued call, the action buttons that can be applied to the call appear.

Controls

Receptionist controls are designed in a contextual manner, that is, most controls appear only when the action they represent can be taken. For example, when you select a call and enter a number or select a contact, the Transfer button appears, allowing you to transfer the call. The controls that correspond to call operations, such as Dial, Transfer, or Hold are called action buttons.

The following table lists the general controls used in Receptionist and the controls displayed on the headers in the panels.

Name	Description

Common Controls	
Options	This allows you to organize items in lists.
Expand/Collapse	This shows or hides the contents of a window or panel.
Close	This closes an interface element, such as window, pane, or panel.
Edit	This allows you to edit contacts in some directories.
Call Console Controls	
END End Conference	This ends a conference call.
LEAVE Leave Conference	This allows you to leave the conference while allowing other participants to continue the call.
HOLD Hold Conference	This places a conference call on hold.
ANS Resume Conference	This resumes a held conference.
Pull Out Directory	This places a selected directory below the Call Console.
Dialog Box – Notification Window	
vCard	This saves the caller's phone number and personal information as a vCard in Microsoft Outlook.
Transfer to Voice Mail	This transfers an incoming call to your voice mail.

Call Action Buttons

Action buttons allow you to perform actions on calls, such as answering or transferring a call, or actions that result in a call being placed, such as dialing a number or contact. They appear on the Dialer, a call line, a call history log, or a directory entry.

Action buttons are contextual, that is, they appear on a line/entry only when you move the mouse over that entry and when the corresponding action can be performed on that entry.

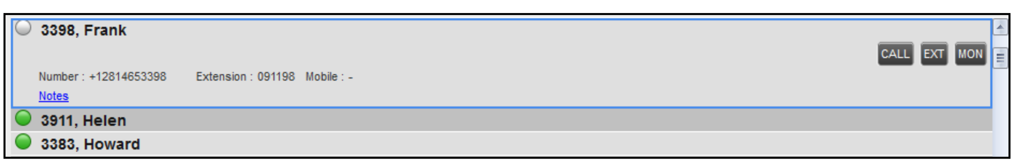


Figure 20 Company Contacts Panel – Contact in Focus with Action Buttons

The following table lists action buttons available in Receptionist.

Button	Description
Dial	This dials the number you entered in the *Dialer*.
CALL	This places a call to the selected contact or to a number from Call History.
Redial Redial	This redials the last dialed number.
EXT Extension	This dials the contact's extension.
MOB Mobile	This dials the contact's mobile number.
Transfer Transfer	This transfers a call to an ad hoc number entered in the Dialer.
TXR Transfer	This transfers a call to a selected number or contact.
VM Transfer to Voice Mail	This transfers a call to the selected contact's voice mail.
ANS Answer	This answers an incoming call, answers an unanswered call for a contact, or resumes a held call.
HOLD Hold	This places a call on hold.
END End	This ends a call.
CONF Conference	This establishes a conference call or adds a call to a conference.
CAMP Camp	This camps the call on a busy contact.
BARGE Barge In	This barges in on a contact's call.
PARK Park	This parks a call on a contact.
Monitor	This starts monitoring the state of the selected contact.
RETRIEVE Retrieve	This retrieves a selected call from the queue to the supervisor's device.
REORDER Reorder	This changes a selected call's position in the queue.

Manage Calls

This section includes information and procedures on how to manage current calls. You use the *Call Console* to view and manage your current calls.

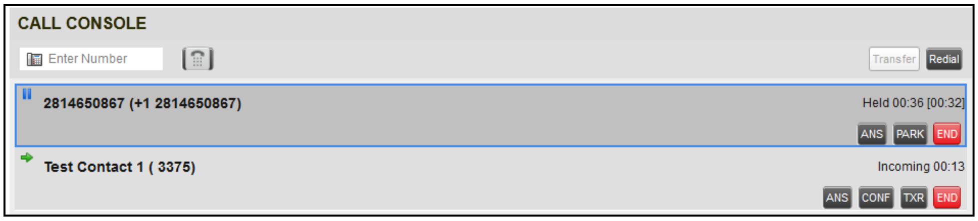


Figure 21 Call Console

Drag and Drop Call onto Contact

For operations on calls that involve a contact, you can drag a call from the *Call Console* and drop it on a target contact in one of your contact's directories. This provides you with a quick way to perform operations on calls that involve a contact.

As the call is dragged, a green arrow appears. When the call is dropped onto a contact, no action is taken on the call. The target contact expands and you can select the action button for the operation you want to perform on that call.

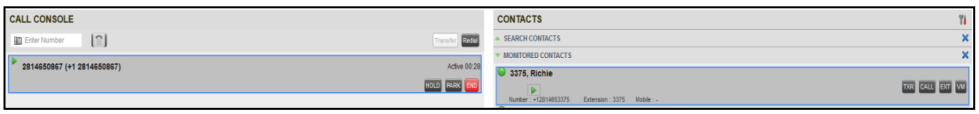


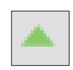
Figure 22 Dragging Call and Dropping it on Contact

View Call Information

Call information is provided in the *Call Console* and in the *Call Notification* pop-up window that appears on top of the system tray for incoming calls.

View Current Calls

Your current calls are always visible in the *Call Console*.

To view a conference call, in the *My Conference Calls* panel, click the **Expand** button .

View Incoming Call Details

If the Call Notification feature is enabled, a *Call Notification* pop-up window appears on top of the system tray when an inbound call is received.

- *Direct inbound calls* – For calls to your direct number or extension, the following information is displayed:
  - Calling party name
  - Calling party number

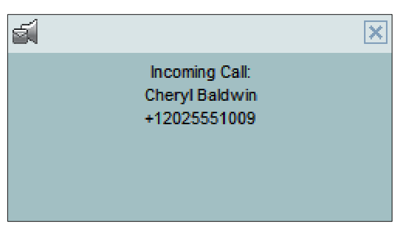


Figure 23 Call Notification Pop-up Window for Non-ACD Call

- *Calls from a call queue* – For calls from a call queue, the call queue name is displayed in addition to the caller's name and phone number.

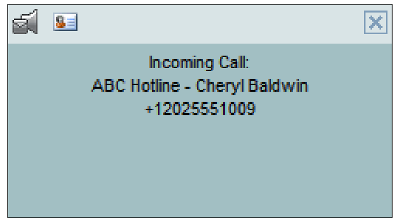


Figure 24 Call Notification Pop-up Window – Call from Call Queue

  - **Note 1**: You must have only one tab open in the browser running Receptionist to receive call notifications.
  - **Note 2**: If calls come within eight seconds of each other, the *Call Notification* pop-up window only appears for the first call of that series.

Save vCard

When you receive a call, a *Call Notification* pop-up window is visible on top of the system tray. From this window, you can save the caller's phone number and personal information as a vCard in Microsoft Outlook.

To save **caller's information as a vCard:**

- In the *Call Notification* pop-up window, click the **Add vCard** button .
- This button is present only when Outlook is running.

Answering Calls

You can answer your own incoming calls and calls for other users in your group.

Answer Call

Your incoming calls appear in the *Call Console*. To answer a call, the call state must be *Incoming.*

To answer **an incoming call:**

- Move the mouse over the call and click **Answer** ANS. The call state changes to *Active*.

  - **Note**: Double-clicking a call, does not answer it.

To answer **an incoming call from a Call Notification pop-up window:**

- Click anywhere on the text in the window.

Hold and Resume Calls

You can only put an active call on hold.

Put Call on Hold

To put **a call on hold:**

- Move the mouse over the call and click **Hold** HOLD.

Resume Held Call

To resume **a held call:**

- Move the mouse over the call and click **Answer** ANS.
  - **Note**: Double-clicking a call does not take the call off hold.

Make and End Calls

Receptionist provides you with several ways in which you can make calls. When you dial a number or contact, the call appears in the *Call Console* as *Incoming Local.*

Dial Ad Hoc Number

You use the *Dialer* to place a call to an ad hoc number.

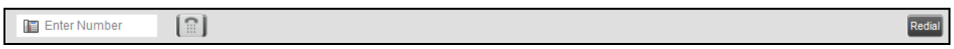


Figure 25 Dialer

To dial **an ad hoc number:**

- In the *Dialer*, enter the phone number and click **Dial**. The call appears in the *Call Console* as *Incoming Local* and your phone rings.
- Click **Answer** ANS for that call. An outbound call is placed and the call state changes to *Outgoing*.

Redial Number

Receptionist keeps up to ten most recently dialed numbers.

To redial **one of the recently dialed numbers:**

- In the *Dialer*, place the cursor in the text box and start entering a number. A list of recently called numbers that start with the entered digits appears.

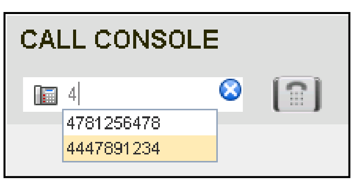


Figure 26 Dialer – Select Recently Dialed Number

- Select the number to dial and click **Dial**. The client issues a Click-To-Dial attempt to the selected number.

  Alternatively, click the **Redial** Redial button and select the number from the list that appears.

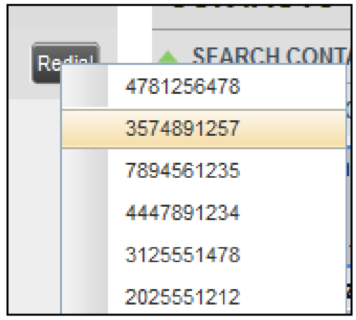


Figure 27 Dialer – Redialing Number

Dial Contact

You can dial contacts from any directory available in Receptionist.

To dial a contact:

- In the *Contacts* pane, expand the directory from which you want to dial a contact.
- Click the contact to expand it and click **Call** CALL for that contact. A Click-To-Dial action is initiated and your phone rings.

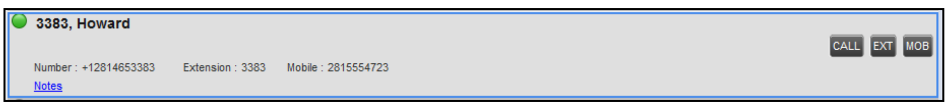


Figure 28 Company Contacts Panel – Contact in Focus with Call, Extension, and Mobile Buttons

- Answer the phone. An outbound call is placed.

  Alternatively, to dial the contact's extension, click **Extension** EXT or to dial the contact's mobile number, click **Mobile** MOB.

End Call

To end a call, click **End** END for that call.

Transferring Calls

There are a number of ways in which you can transfer a call. You can blind transfer calls or transfer calls with consultation or supervision. You can also transfer calls directly to voice mail or to a queue.

Blind Transfer Call

A blind transfer occurs when a call is transferred without an introduction. Calls may be blind transferred while active, held, or ringing (in) on your phone. If a call is ringing (in), blind transfer allows the call to be redirected before it is answered. You can blind transfer a call to an ad hoc number or to a contact.

To blind **transfer a call to an ad hoc number:**

- In the *Call Console*, select the call to transfer.

- In the *Dialer*, enter the destination number and click **Transfer** . The call is transferred and removed from the *Call Console*.

To blind **transfer a call to a contact:**

- In the *Call Console*, select the call to transfer.
- In the *Contacts* pane, expand the panel from which you want to select a contact.
- Click the destination contact to expand it, and click **Transfer** for that contact. The call is transferred and removed from the *Call Console*.

  Alternatively, drag the call onto the target contact and click **Transfer** for that contact.

Conduct Supervised Transfer

When you have an active inbound call that you want to transfer, you can follow this procedure.

To conduct **a supervised transfer:**

- In the *Call Console*, select the call to transfer. Dial the number or contact to whom you want to transfer the call.
- If the dialed contact is busy, either retry or dial another contact.
- Move the mouse over the new, non-selected call and click **Transfer** .

Transfer with Consultation

Use this method to transfer a call with an introduction to the destination party. Calls may be transferred this way while active, held, or ringing (in) on your phone. In the latter case, the system redirects the call before it is answered.

To transfer **a call with consultation**:

- Make a call to the person to whom you want to transfer the call. If the first call was active, it is put on hold. The new call appears in the *Call Console*.
- Wait until the called party accepts your call and speak to the party.
- When ready to transfer, in the *Call Console*, select one of the two calls.
- Move the mouse over the non-selected call and click **Transfer** .

  The calls are connected and removed from the *Call Console*.

Transfer to Voice Mail

You can transfer a call to a monitored contact's voice mail or to your own voice mail. Calls may be transferred while active, held, or ringing (in) on your phone.

To transfer **a call to voice mail:**

- In the *Call Console*, select the call to transfer.
- In the *Contacts* pane, expand the *Company Contacts* or *Monitored Contacts* directory and find the contact. Find yourself if you want to transfer the call to your voice mail.

- Click the contact and click **Transfer to Voice Mail** for that contact.

  Alternatively, drag the call onto the target contact and click **Transfer to Voice Mail** for that contact.
  You can also transfer an incoming call to voice mail from the *Call Notification* pop-up window.

To transfer **an incoming call to your voice mail:**

- In the *Call Notification* pop-up window that appears when you receive a call, click **Transfer to Voice Mail** .

Transfer to Queue

You can transfer a current call to any queue that appears in your *Call Queues* panel. The call is placed at the bottom of the new queue.

To transfer a call to a queue:

- In the *Call Console*, select the call to transfer.
- Expand the *Call Queues* panel.
- Click the destination queue and click **Transfer** . The call is transferred and removed from the *Call Console*.

  Alternatively, drag the call onto the target queue and click **Transfer** for that queue.

Parking and Camping Calls

Call parking or camping allows you to find a temporary parking place for the call. If the parked or camped call is not answered within the predefined time, the call is recalled and reappears in your *Call Console*.

Conduct Busy Camp On

Busy Camp On allows you to place a call at a busy contact. The call is automatically transferred to the destination when the contact becomes available to take the call. A call to camp must be active or held, and the destination contact must be either *Busy* or *Ringing*.

- **Note**: To use the feature, you need to have the Busy Camp On option enabled under the Call Transfer feature.

To camp **a call on a busy contact:**

- In the *Call Console*, select the call to camp.
- In your *Company Contacts* or *Monitored Contacts* directory, click a *Busy* or *Ringing* contact and click **Camp** . Once the call is camped, it is removed from the *Call Console*.

  If the call reaches the designated expiration timer before the call is answered, the call is recalled to your device and reappears in the *Call Console*.

Conduct Group Call Park

Group Call Park searches within a predefined hunt group for an available line on which to park a call. After a designated time, the call returns to the originating operator or a specified hunt group (depending on how the service is configured). If the parking attempt fails for any reason, the call remains in your *Call Console*.

To perform **a Group Call Park:**

- In the *Call Console*, move the mouse over an active or held call and click **Park** . The call is parked on an available extension and removed from *the Call Console*.

  If the call reaches the designated expiration timer before the call is answered, the call may be recalled to your device and reappear in your *Call Console*.

Manage Conference Calls

You manage your conferences in the *Call Console*.

- You use the top area of the *Call Console* to establish a conference and add participants to it.
- You use the *Conference Call* panel to manage or end an active conference.

  You can only have one active conference at a time.

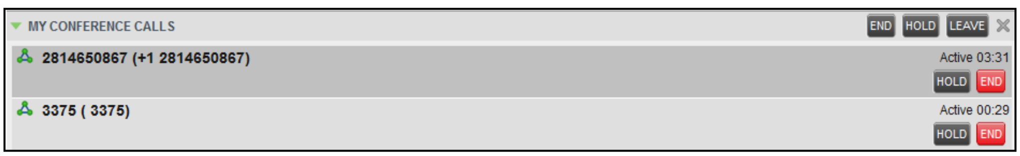


Figure 29 Call Console – My Conference Calls Panel

Start Three-Way Conference

To start a conference you need to have at least two current calls.

To start **a conference:**

- If necessary, place calls to participants using any of the methods described in section *0 Make and End Calls*.
- In the *Call Console,* select one of the two calls.

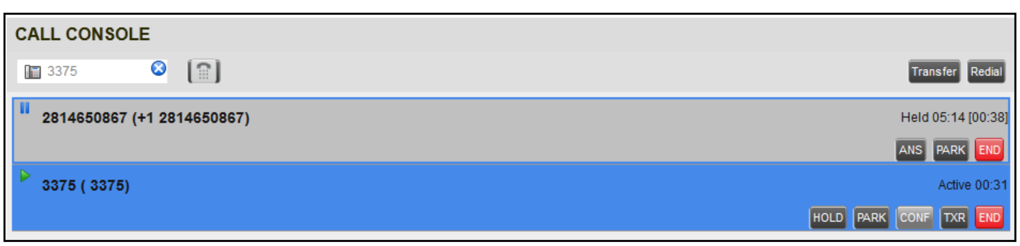


Figure 30 Starting Conference

- Move the mouse over the non-selected call and click **Conference** . A Three-Way Conference is established and the connected calls are moved to the *Conference Call* panel.

Hold Conference

To put **an active conference on hold:**

- In the *Conference Call* panel, click **Hold Conference** HOLD. This allows other conference participants to continue their conversation.

Resume Held Conference

To resume **a held conference:**

- In the *Conference Call* panel, click **Resume Conference** ANS. All the calls in the conference become active.

Put Conference Participant on Hold

To put **a specific conference participant on hold:**

- Expand the *Conference Call* panel.
- Move the mouse over the target call and click **Hold** HOLD.

Resume Conference Participant

To resume **a conference participant:**

- Expand the *Conference Call* panel.
- Move the mouse over the target call and click **Answer** ANS.

Leave Conference

To leave the conference:

- In the *Conference Call* panel, click the **Leave Conference** LEAVE button.

  Note: This function is only available for Three-Way Conferences.

Remove Conference Participant

To end a selected call in the conference:

- Expand the *Conference Call* panel.
- Move the mouse over the call and click **End** END.

End Conference

To end the conference:

- In the *Conference Call* panel, click **End Conference** END. This releases all the calls that participate in the conference.

Manage Contacts

Receptionist allows you to view, search, and organize your contact directories.

You use the *Contacts* pane to manage your contact directories, to monitor selected contacts, and to use your contacts to make or manage calls.

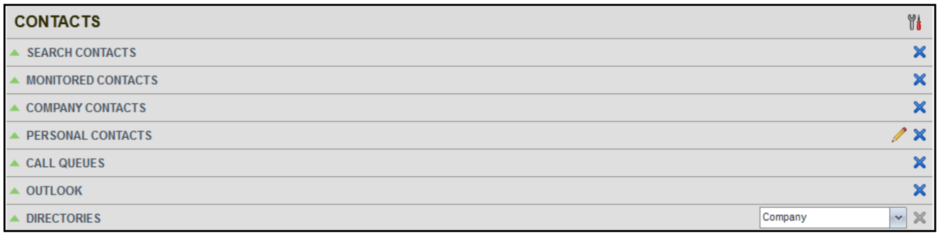


Figure 31 Contacts Pane

This section describes the directories management functions provided by Receptionist.

Show/Hide Directories

Receptionist allows you to specify which directories should be visible in the *Contacts* pane.

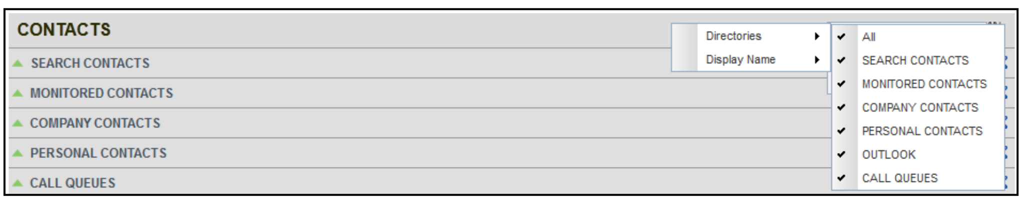


Figure 32 Contacts Pane – Expanded Options Menu

All directories can be displayed individually in the *Contacts* pane.

In addition, you can decide which directories to display in the *Directories* panel (on their own or with other directories), and below the *Call Console*.

To display **or hide a directory in the Contacts pane:**

- At the top right-hand side of the *Contacts* pane, click **Options** .
- From the menu that appears, select *View*, then *Directories*, and then select or unselect the directory to display/hide. To display all directories, select *All*.
- To hide a directory, you can also click the **Close** button  in that directory's panel.

  Note: You cannot close the *Directories* panel.

To display **a directory in the *Directories* panel:**

- In the *Directories* panel, select the directory to display from the drop-down list. To display all directories, select *Show all*.

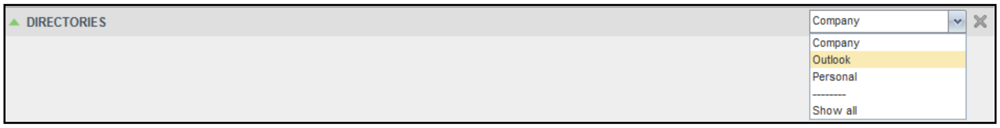


Figure 33 Directories Panel – Selecting Directory to Display

To display **a directory below the Call Console:**

- In the *Directories* panel, select *Show all*.

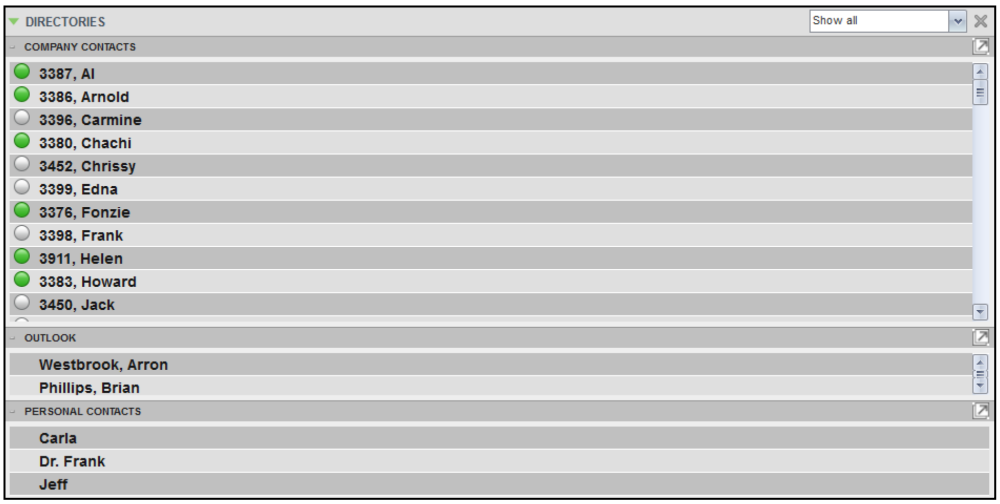
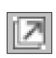


Figure 34 Directories Panel – Selecting Directory

- Click the **Pullout Directory** button  for the directory to display.

  The directory appears below the *Call Console*.

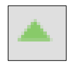
Figure 35 Outlook Contacts Directory Displayed Below Call Console

- To close the directory, click the **Close** button  for the directory.

Show/Hide Directory Content

By default, your directories are collapsed, with only the title bar visible. You can selectively expand directories that you want to consult or use.

To show or hide contacts in a directory:

- In the *Contacts* pane, click the **Expand/Collapse**  button for that directory.

Search Contacts

The Search feature allows you to search for contacts in one, several, or all directories.

You use the *Search Contacts* panel located at the top of the *Contacts* pane to perform contact searches.

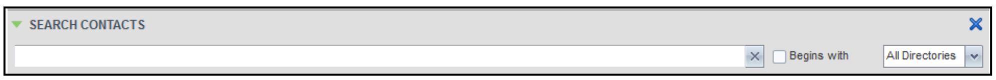


Figure 36 Search Contacts Feature

To search **one or more directories:**

- In the *Search Contacts* text box, enter the text you want to search for and press ENTER. You can enter partial information, such as part of a name or phone number.
- For example, if you do not remember whether Mary's last name is spelled "Shelley" or "Shelly", you can enter "Shell", and either name is returned.
- To restrict the search to contacts that start with the entered text, check the *Begins with* box.
- From the drop-down list, select the directories to search.
- Press ENTER.

  The text you enter is matched against all attributes of every entry in the selected directories.

  - **Note**: The search is not case-sensitive; the search for "Ann" and "ann" returns the same results.

Search results are displayed in the *Search* panel, each contact listed with the name of the directory where they were found.

BroadWorks directories are searched in the following order: Supervisors, Agents, Company Contacts. Duplicate search results in BroadWorks directories are not displayed; the first match for a given contact is displayed.

Duplicate search results in other directories are displayed.

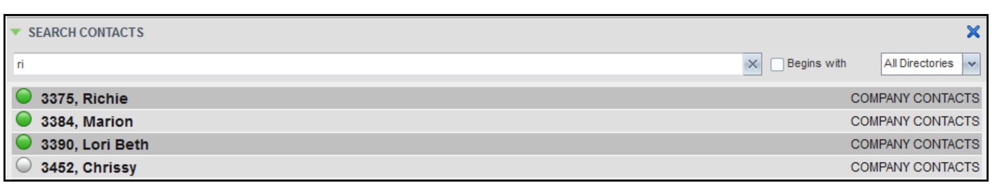


Figure 37 Contacts Pane – Search Contacts Results

The search returns either all the contacts (in the selected directories) that contain the entered keyword or all the contacts that start with the entered keyword.

In the first case (*Contains*), entering “Ann” returns all contacts with the name “Ann”, but it also returns all contacts with names such as “Anne”, “Marianne”, “Marie Ann”, “Ann Marie”, and so on.

In the second case (*Starts With*), entering “Ann” returns all contacts with names such as “Ann”, Anne”, and Ann Marie”, but not “Marianne” or “Mary Ann”.

- To clear the search results, click **Reset** .

  Note: Contact entries displayed in search results follow the same rules as if that entry was accessed in its own directory. This allows you to perform any operations directly from the search results.

Order Directory Entries

Receptionist allows you to order directory entries. This setting takes effect immediately. The directories that can be ordered are *Company Contacts* and *Monitored Contacts* (by first or last name) and *Call Queues* (by name).

To order **a directory:**

- At the top of the *Contacts* pane, click **Options** .
- From the drop-down list, select *Sort*, then the directory to order, and then the field to sort by.

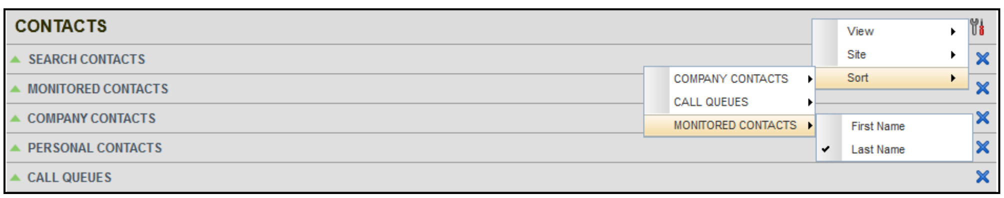
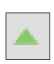


Figure 38 Sort Directory

The contacts in the selected directory are reordered based on the selected field.

- To view the contacts, click **Expand**  for that directory.

View Contact Details and Make Notes

Receptionist Enterprise allows you to view contact information. You can also make notes about the contacts in your *Company Contacts* directory.

To view **contact details:**

- Expand the target directory panel.
- Click the contact to view. This expands the row for the contact displaying additional information about the contact, which includes the contact’s phone numbers (as provisioned). If a call is parked against the contact and if you are monitoring, the information about the parked call is also displayed.

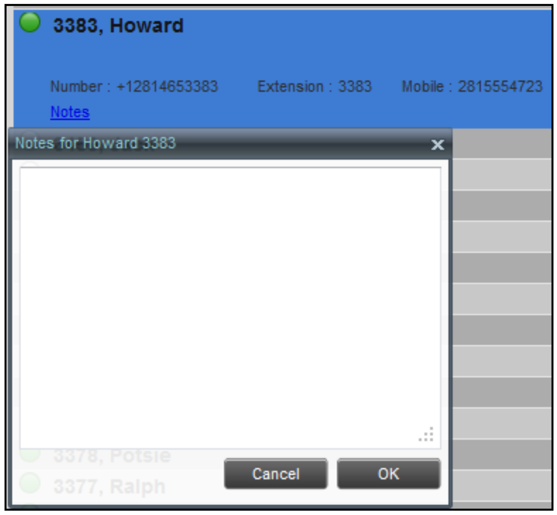


Figure 39 Company Contacts Contact Details and Notes

Only one contact per directory can be expanded at a time. When you click a contact, the system automatically hides the details of the previously expanded contact.

To view or make a note about a contact:

- In the *Company Contacts* directory, click the contact.
- Click the **Notes** link. The *Notes for <Contact Name>* dialog box appears.

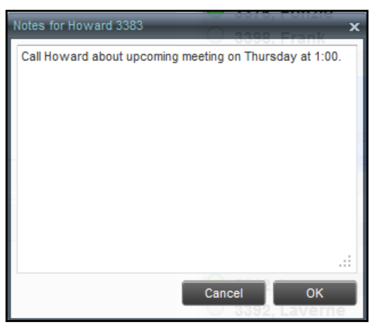


Figure 40 Notes for Contact Dialog Box

- Enter the desired text or view or modify the existing text in the *Notes* text box.
- To save your changes and close the dialog box, click **OK**.
- To close the dialog box without saving, click **Cancel**.

Manage Personal Contacts

You can add or remove personal contacts in Receptionist.

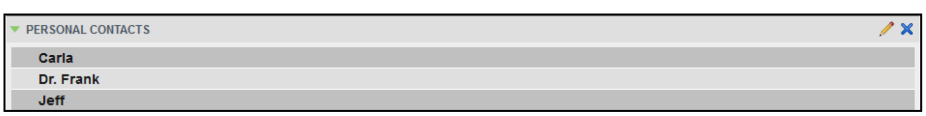


Figure 41 Personal Contacts Panel

You cannot modify a personal contact entry in Receptionist. To modify information for a personal contact, delete the entry and add it again.

Add Personal Contact

To add **a personal contact:**

- In the *Personal* panel, click **Edit** . The *Edit Personal Contacts* dialog box appears.
- Click **Add**. A new line is added below the existing entries, allowing you to define a new entry.

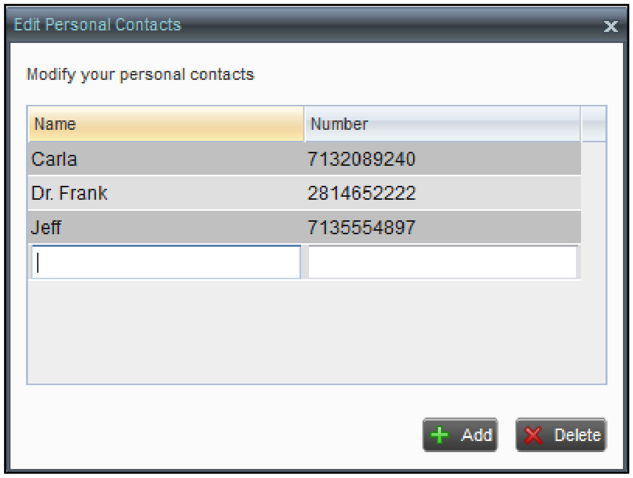


Figure 42 Edit Personal Contacts Dialog Box – Add Entry

- In the *Name* text box, enter the contact's name or description, as you want it to appear.
    - In the *Number* text box, enter the phone number of the contact.
- To save the changes, click anywhere in the dialog box outside the entry.

Delete Personal Contact

To delete a speed dial entry:

- In the *Personal* panel, click **Edit** . The *Edit Personal Contacts* dialog box appears.
- Select the entry to delete and click **Delete**.

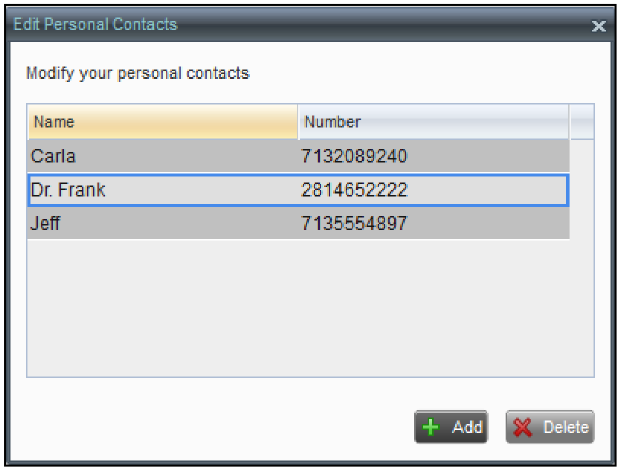


Figure 43 Edit Personal Contacts Dialog Box – Delete Entry

Monitor Contacts

Receptionist allows you to monitor the call status of selected contacts. All editions of Receptionist allow you to monitor contacts configured through the My Site portal. This is referred to as static monitoring. In addition, Receptionist Enterprise allows you to monitor selected contacts dynamically.

The following table summarizes the monitoring capabilities of the different editions of Receptionist:

Call Status	Description
Enterprise	**This is the static monitoring of up to 100 contacts and the dynamic monitoring of a configurable number of contacts enterprise-wide.** **The maximum number of contacts you can dynamically monitor is 50.**
Small Business	**This is the static monitoring of up to 30 contacts enterprise-wide.**
Office	**This is the static monitoring of up to 8 contacts group-wide.**

You use the *Monitored Contacts* panel to view the phone state of statically monitored contacts and the *Company* Contacts panel to view the phone state of dynamically monitored contacts.

Phone States

The phone state of a contact, that is, the state of the contact's phone line, is represented by an icon located to the left of the contact's name. The following table lists the possible phone states for a contact:

Phone State	Icon	Description
Idle		**The contact's phone is on-hook (available to receive a call).**
Busy		**The contact's phone is off-hook (on a call, busy).**

Ringing		**The contact's phone is ringing.**
Do Not Disturb		**The contact has the Do Not Disturb service turned on.**
Private		**The contact has enabled their Privacy feature.**
Call Forwarding Always		**The contact has the Call Forwarding Always service turned on.**
Unknown		**The contact is not monitored.** **NOTE: Virtual users cannot be monitored.**

Static Monitoring

To statically monitor contacts, the list of contacts to monitor must be configured on your web portal. The selected contacts appear in your *Monitored Contacts* directory. However, the updates that you make to the list of contacts to monitor appear in Receptionist at the next sign-in.

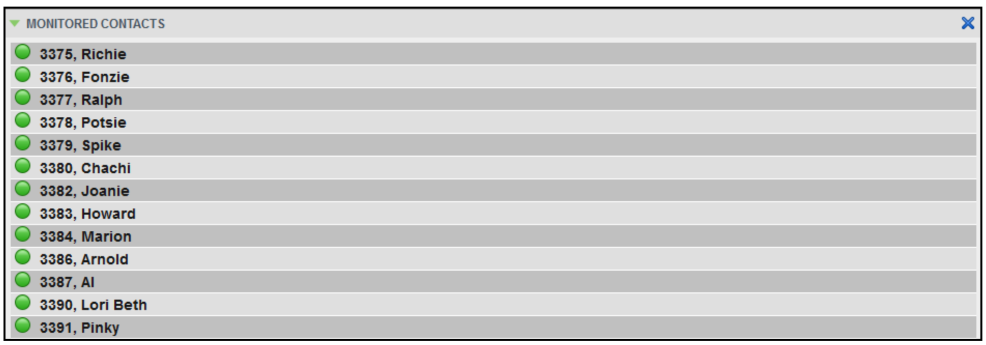


Figure 44 Monitored Contacts Directory

Dynamic Monitoring

Dynamic Monitoring allows you to view the call status of selected contacts in your *Company Contacts* directory. You must request that a contact be monitored. Selected contacts cannot be unselected. When the number of monitored contacts reaches the maximum limit of 50, the first contact that was selected to be monitored is unselected and stops being monitored. The status of a contact that is not monitored is shown as *Unknown*.

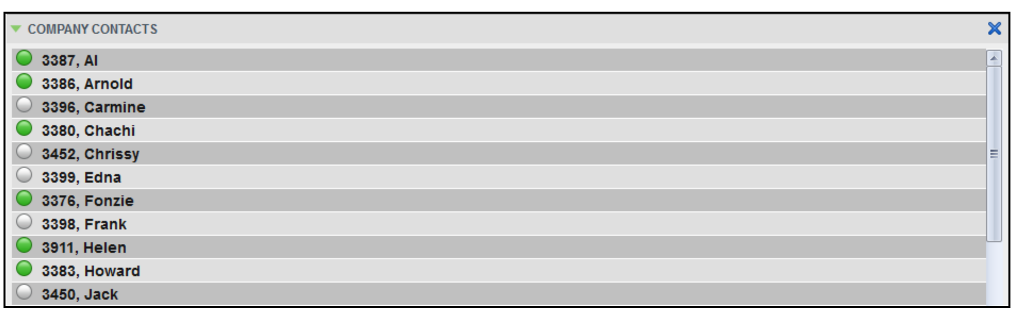


Figure 45 Company Contacts Directory with Monitored Contacts

- **Note:** If a contact in your *Company Contacts* directory is statically monitored, then their phone state is displayed without the need to explicitly request dynamic monitoring; however, it counts toward the total number of dynamically monitored contacts.

Request Contact Monitoring

The set of contacts that you dynamically monitor is stored as part of your context information and automatically retrieved and activated on subsequent sign-ins.

To monitor **a contact:**

- In the *Company Contacts* directory, click the contact to expand it and then click the **Monitor** button  for that contact.

Figure 46 Group Directory – Requesting Contact Monitoring

This requests state notifications from the Application Server for this contact; the contact's state is updated in real time.

Figure 47 Company Contacts Directory – Monitored Contact

Manage Queued Calls

Receptionist allows you to manage calls in selected Call Queues (up to five) and monitor calls in real time. You manage queued calls using the *Queued Calls* pane. This functionality is only available if you are supervising Call Queues.

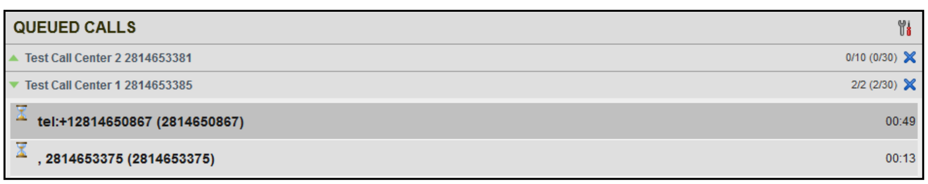


Figure 48 Queued Calls Pane

This section describes the procedures you perform to manage queued calls:

Select Call Queues to Manage

After you sign in to Receptionist, select the Call Queues you want to manage (up to five).

To select **Call Queues:**

- In the *Queued Calls* pane, click **Options**  and select the *Edit Queue Favorite Dialog* option.

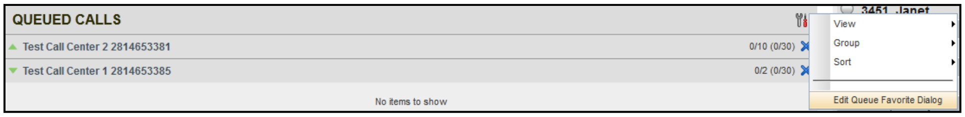


Figure 49 Queued Calls – Options – Edit Queue Favorite Dialog

The *Edit Queue Favorites* dialog box appears.

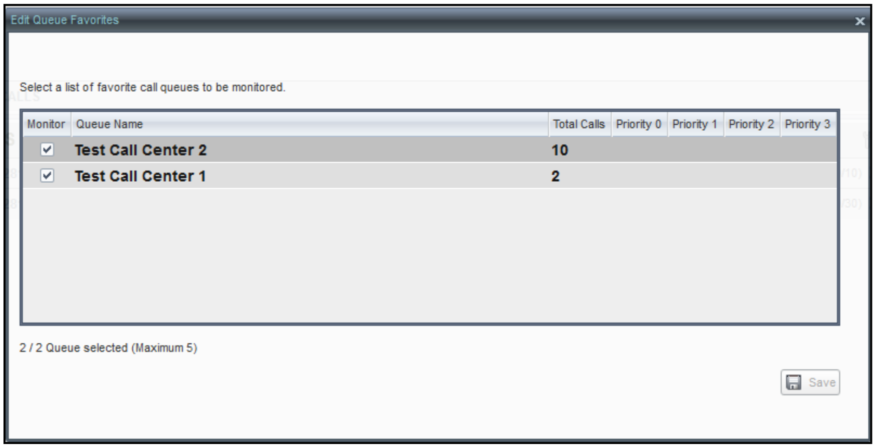
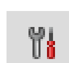


Figure 50 Edit Queue Favorites Dialog Box

- Select the check boxes for the Call Queues you want to monitor.
- Click **Save**. The selected Call Queues appear in your *Queued Calls* pane.

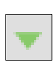
Modify Number of Calls to Display

For each Standard Call Queue that you are monitoring, you can modify the maximum number of calls to be displayed and for each Premium Call Queue you can modify the maximum number of calls that can be displayed in each priority bucket. The total number of calls to display for a Call Queue cannot exceed 50.

- In the *Queued Calls* pane, click **Options**  and select the *Edit Queue Favorite Dialog* option. The *Edit Queue Favorites* dialog box appears.
- For each Standard Call Queue you are monitoring, set the total number of calls to display.

View Queued Calls

To view calls in a queue:

- Click the **Expand** button  for that queue.

Retrieve Call from Queue

You can retrieve a call from a queue to your phone device.

To retrieve **a call from the queue:**

- In the *Queued Calls* pane, click the call to expand it and click **Retrieve**  for that call.

Once you retrieve the call, the call appears in the *Call Console*, and you treat it as any other call.

Transfer Call to Ad Hoc Number

To transfer **a call to an ad hoc number:**

- In the *Queued Calls* pane, select the call.
- In the *Dialer*, enter the destination number and click **Transfer** Transfer.

Figure 51 Ad Hoc Queue Transfer

The call is transferred and removed from the queue.

Transfer Call Between Queues

To transfer **a call to another queue:**

- In the *Queued Calls* pane, select the call.
- In the *Contacts* pane, expand the *Queues* panel.
- Click the target queue and click **Transfer** TXR for that queue.

The call is transferred and removed from the original queue.

Change Position of Call in Queue

To change **the position of a call in the queue:**

- In the *Queued Calls* pane, click the call and click **Reorder** REORDER.

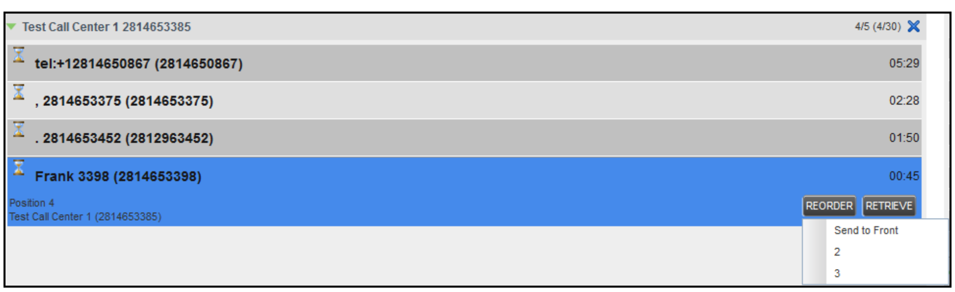


Figure 52 Reordering Queued Call

- In the drop-down box that appears, select the new position in the queue.

  The call is placed at the new position.

  - **Note:** The list can contain a maximum of 24 reorder positions you can choose from to reorder a call in queue, in addition to *Send to Back* and *Sent to Front* options.

Group Calls

You can group queued calls by their priority bucket.

To group or **ungroup queued calls:**

- In the *Queued Calls* pane, click **Options** , select *Group,* and then select or deselect *Group by priority*. This action applies to all monitored Call Queues.

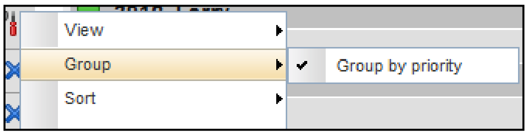


Figure 53 Queued Calls – Options – Group

- To ungroup calls, unselect the *Group by priority* option*.*

Order Queued Calls

Queued calls can be ordered according to their total waiting time or according to their waiting time in the current priority bucket.

To order queued **calls:**

- In the *Queued Calls* pane, click **Options** .
- Select *Sort* and then the ordering option you want. This operation applies to all monitored Call Queues.

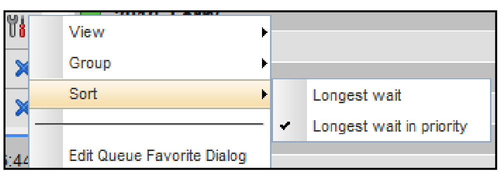


Figure 54 Queued Calls – Options – Sort

Note: The ordering does not work when calls are grouped. If needed, first ungroup the calls.

Configure Receptionist

You use the Settings link at the top right-hand corner of the main page to access the *Settings* page where you can configure various aspects of the Receptionist application.

- **Note**: Do **not** use the internet browser's Back button to return to the main interface.

This section describes the *Settings* pages that you use to configure Receptionist.

Settings – General

There are no configurable General Settings in the current release of Receptionist.

Settings - Application

You use the Application tab to configure your availability to specific call queues.

Figure 55 Settings – Application

The settings can be configured on this page and are described in the following subsections.

Queue Membership

These settings allow you to select which queues you want to join.

To join queues:

- To join a specific queue, select the check box on the line for the queue. You will only be able to monitor those queues to which you are an active participant.
- To join all queues, select the check box in the column header.

Note: If you are not allowed to join/leave a queue, the line for the queue is dimmed and you can only view your join status in the queue. To change your join status in a queue if you are not allowed to do it yourself, contact your administrator.

For queues on this page, you can select columns to appear and you can sort and group queues by any column.

Settings – Services

You use the Services tab to configure various services assigned to you by your administrator on BroadWorks, which are applicable to Receptionist. These settings are only available if you have been assigned such services. For more information, see your administrator.

The services are grouped into two categories: Active and Inactive.

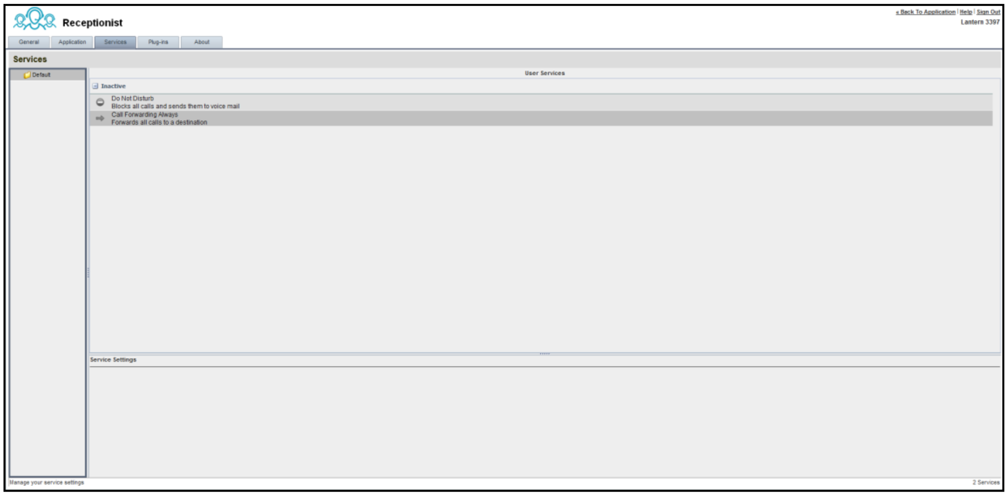


Figure 56 Settings – Services

The services that you can configure (if you have been assigned the services) are:

- Do Not Disturb – When you activate this service, you are not available to take calls, and all your calls are automatically sent to your voice mail.
- Call Forwarding Always – When you activate this service, you need to provide the phone number to forward your calls to. When the service is active, all your calls are forwarded to the specified number.

To activate a service:

- Select the service and check the *is Active* box. The service is moved from the *Inactive* to *Active* category.

  - If you enabled the Call Forwarding Always service, in the *Forward To* text box that appears, enter the phone number to forward the calls to.
  - To generate a ring splash for incoming calls, check the *Ring Splash* option.
  - To save your changes, click **Save**.

Settings – Plug-ins

You use the Plug-ins tab to configure the plug-in software used by Receptionist to provide Outlook Integration functionality.

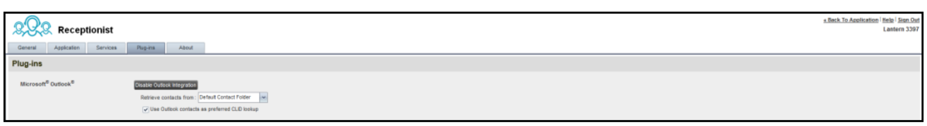


Figure 57 Settings – Plug-ins

Microsoft Outlook

The Microsoft Outlook options control Outlook integration with Receptionist. They are only visible if Outlook integration is enabled in Receptionist.

The options you can set are as follows:

- *Enable/Disable Outlook Integration* – This determines whether Receptionist integrates with Outlook to provide you with access to your Outlook contacts. If Outlook integration is disabled, the corresponding desktop plug-in software components are not downloaded from BroadWorks.
- *Retrieve contacts from* – This option allows you to specify where to look for your Outlook contacts.
- *Use Outlook contacts as preferred CLID lookup* – When this option is checked, Receptionist uses Outlook to try to identify a caller, when the caller ID is unknown.

Settings – About

Use the About tab to view the information about Receptionist.

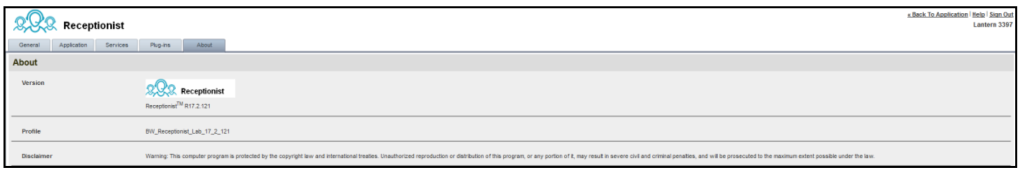


Figure 58 Settings – About Page

The following information is provided on this page:

- Version – This is the software version of the BroadWorks Receptionist client.
- Profile – This is the Receptionist client profile used.
- Disclaimer – This is the Receptionist copyright Information.

Appendix A: Glossary and Definitions

Phone States

Phone states show the state of the monitored contact's phone line.

Phone State	Icon	Description
Idle		**This is when the contact's phone is on-hook (available to receive a call).**
Busy		**This is when the contact's phone is off-hook (on a call, busy).**
Ringing		**This is when the contact's phone is ringing.**
Do Not Disturb		**This is when the contact has the Do Not Disturb service turned on.**
Private		**This is when the contact has enabled their Privacy feature.**
Call Forwarding Always		**This is when the contact has the Call Forwarding Always service turned on.**
Unknown		**The contact is not monitored.** **NOTE: Virtual users cannot be monitored.**

Call States

Call states are the states that your current calls can be in. They are as follows:

Call State	Display Name	Icon	Description
Ringing In (Local)	Incoming Local		This represents a Click-To-Dial call ringing on your phone.
Ringing In (Remote)	Incoming		The call is coming in and ringing on your phone.
Ringing In (Recalled Call)	Call Recalled		The call was parked or camped and is being recalled because its timer has expired.
Ringing Out	Outgoing		The call is outgoing, ringing out. This is equivalent to a phone ringing on the called party's phone.
Active	Active		The call is an active call.
On Hold	Held		The call is on hold.
On Hold (Remote Held)	Remote Held		The call is held by the remote party.
Active (In Conference)	Active		The call is in a conference and active.
Held (In Conference)	Held		The call is in a conference and on hold.

Appendix B: Keyboard Shortcuts

When using keyboard shortcuts, make sure that the main interface window is in focus.

Key	Equivalent Mouse Action	Description
ESC	Click the **Close** button in a dialog box.	This closes the open dialog box.
ESC	Cancel the changes.	This exits the currently selected editable item, such as a text box.
/	Click the *Dialer* text box.	This places the cursor in the *Dialer* text box; it retains the currently selected item (if applicable). **NOTE**: In Internet Explorer 8, the "/" shortcut key does not always work. Pressing the key clears the default *Enter Number* text, but does not place the cursor in the input box.
?	Click the *Search* text box.	This places the cursor in the *Search* text box; it retains the currently selected item (if applicable).
ARROW DOWN	Click the scroll bar or the next item in a list.	This selects the next item in the *Call Console* or *Queued Calls* pane.
ARROW UP	Click the scroll bar or the previous item in a list.	This selects the previous item in the *Call Console* or *Queued Calls* pane.
PAGE DOWN	Scroll down one page.	This goes to the next page in the *Call Console* or *Queued Calls*

		pane.
PAGE UP	Scroll up one page.	This goes to the previous page in the *Call Console* or *Queued Calls* pane.
1….9	Select a call in the *Call Console*.	Pressing “1” selects the first call, pressing “2” selects the second call, and so on.
SPACEBAR	Click **Answer** on the selected incoming call in the *Call Console*.	This answers the selected incoming call or if no call is selected, the incoming call that has been waiting the longest. Pressing the SPACEBAR again answers the next longest waiting incoming call, which puts the previously answered call on hold.
<PERIOD>	Click **End** on a selected call in the *Call Console*.	This ends the selected call.
ENTER	Click **Dial**.	If the cursor in placed in the *Dialer* text box, the entered digits are dialed.
ENTER	Click **Search**.	If the cursor is placed in the *Search* text box, a search is performed.
+	Click **Transfer** in the *Dialer*.	This transfers the selected call to the ad hoc number entered in the *Dialer*.
SHIFT+1..9	Select a ringing call and click **Answer**.	Pressing **SHIFT+1** selects and answers the first ringing call, pressing **SHIFT+2** selects and answers the second ringing call, and so on.
SHIFT+1..9	Select an active call and click **Hold**.	Pressing **SHIFT+1** selects and places the first active call on hold, pressing **SHIFT+2** selects and answers the second active call, and so on.
SHIFT+1..9	Select a held call and click **Retrieve**.	Pressing **SHIFT+1** selects and retrieves the first held call, pressing **SHIFT+2** selects and retrieves the second held call, and so on.
S or s	Click on **Settings** link.	This opens the *Settings* page if main window is in focus.
B or b	Click on **Back to Application** link.	This goes back to the main page from the *Settings* page.
R or r	Click the **Call History** button.	This opens the *Call History* dialog box.
H or h	Click the **Help** link.	This opens this guide in a PDF format.
SHIFT+L or SHIFT+l	Click the **Sign Out** link.	This signs the user out of the application.

Appendix C: Multi-Platform Support

The Receptionist client is supported on Windows and non-Window operating systems. The following table outlines support for operating systems, third-party applications such as Outlook, and virtualization environments such as Citrix. Some desktop plug-ins are operational only in the Windows operating system.

We recommend that you always use the latest service packs/updates for your operating system and browser.

System/Software	Version	Supportability
Microsoft Windows	XP, Vista, 7	Yes (current service packs recommended)
Mac OS X	10.5 (Leopard), 10.6 (Snow Leopard)	Yes (current updates recommended)
Internet Explorer	7, 8	Yes (IE installations on Windows only)
Firefox	3.6	Yes (Windows and Mac installations only)
Safari	5	Yes (Mac installations only)
Microsoft Outlook	2003, 2007, 2010	Yes (Windows installations only)
Java	1.6.0_20	Yes (Windows and Mac
Citrix XenApp	4, 5	Yes (Windows installation only)

Revision History

Date	Version	Author	Details
20-Mar-2013	1.00	Gurung	Draft
21-Mar-2013	1.01	Gurung	Draft – updated section headings
11 Jul 2013	1.02	Gurung	Applied section styles, removed draft marker

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