

Strata[®] *DK*

Digital Business Telephone Systems

**PC Attendant Console
User Guide**

Publication Information

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Introduction

This guide provides instructions for operating a Strata DK PC Attendant Console for Microsoft® Windows® working with following Strata DK Systems. These systems include all processors except the RCTUA, for the following:

- ♦ DK280
- ♦ DK424

This guide is written assuming that you are familiar with operating a PC, mouse, and Windows software.

Organization

This guide is divided as follows:

- ♦ **Chapter 1—The Grand Tour** includes information on the PC Attendant Console keyboard, the Main Menu, and how to navigate through the menus and dialog boxes. It also describes the Feature Toolbar.
- ♦ **Chapter 2—Console Controls** provides descriptions and instructions for each of the console settings. These settings include the console mode, time and date, and general settings affecting how calls are handled during and after your shift.
- ♦ **Chapter 3—Basic Calling** explains how to perform the most commonly-used features, including answering, calling, and transferring calls.
- ♦ **Chapter 4—Advanced Calling** describes how to use more advanced features, such as Speed Dialing, Call Parking, etc., and other features available from the Features submenu.
- ♦ **Chapter 5—Directory** explains how to add names, phone numbers, and status information to the directory, as well as how to access it and perform a search.
- ♦ **Chapter 6—Message Center** shows the various features available for taking memos and sending messages and message notifications.

- ♦ **Chapter 7—View Menu** provides instructions for displaying the Toolbar and Status Bar, viewing and printing Call Statistics.
- ♦ **Chapter 8—Administration** describes various administrative features which affect the console's capabilities.
- ♦ **Appendix** contains instructions for setting those Windows controls which affect the PC Attendant Console.

How to Use This Guide

We suggest that you read this entire guide and get acquainted with the on-line help screens, described in Chapter 1—The Grand Tour.

Conventions

An icon on the left side of the page represents the feature toolbar icon that you can click on to access the feature or the feature's dialog box.

The left column gives you the single or numbered steps you need to perform a procedure. These steps apply to both mouse or keyboard use.	The right column gives the immediate response to your action. This column also includes additional notes and comments.
--	--

Note Elaborates specific items or references other information.

Important! *Calls attention to important instructions or information.*

CAUTION! **Advises you that hardware, software applications, or data could be damaged if the instructions are not followed closely.**

Letters in [brackets] represent buttons which have Directory Numbers on them, such as PDN. For example:

[PDN] Primary Directory Number button (the Extension or Intercom Number). In older versions of selected systems, this button may be referred to as **INTERCOM** or **INT**.

Bracketed letters also represent variables. For instance, instructions for pressing **Alt** + a keyboard letter will be shown as **Alt** + [**letter**], since the letter will be different depending on the desired response. Soft keys are on-screen keys which change according to the current conditions.

Extra Bold represents buttons on telephone.

Courier letters represent PC Attendant Console keyboard keys. For example: **Conf/Trans**.

Times Roman words that are capitalized represent a specific dialog box button. For example: Transfer button.

“Press” means to touch a specific keyboard button.

“Select” means to choose a specific keyboard *or* dialog box button.

“Click” means to press and then release the mouse button without moving the mouse.

➤ denotes the step in a one-step procedure.

~ means “through”. For example: 5~10.



represents an icon button on the feature toolbar. When you click on this icon, it achieves the same result as the step that it appears next to.

Related Documents

The following documents can be referenced for additional information:

♦ **Strata DK280 Installation and Maintenance Manual**

In the *DK280 Installation and Maintenance Manual*, see Chapter 5 for PC Attendant Console installation instructions and minimum hardware requirements. Also see appropriate programs.

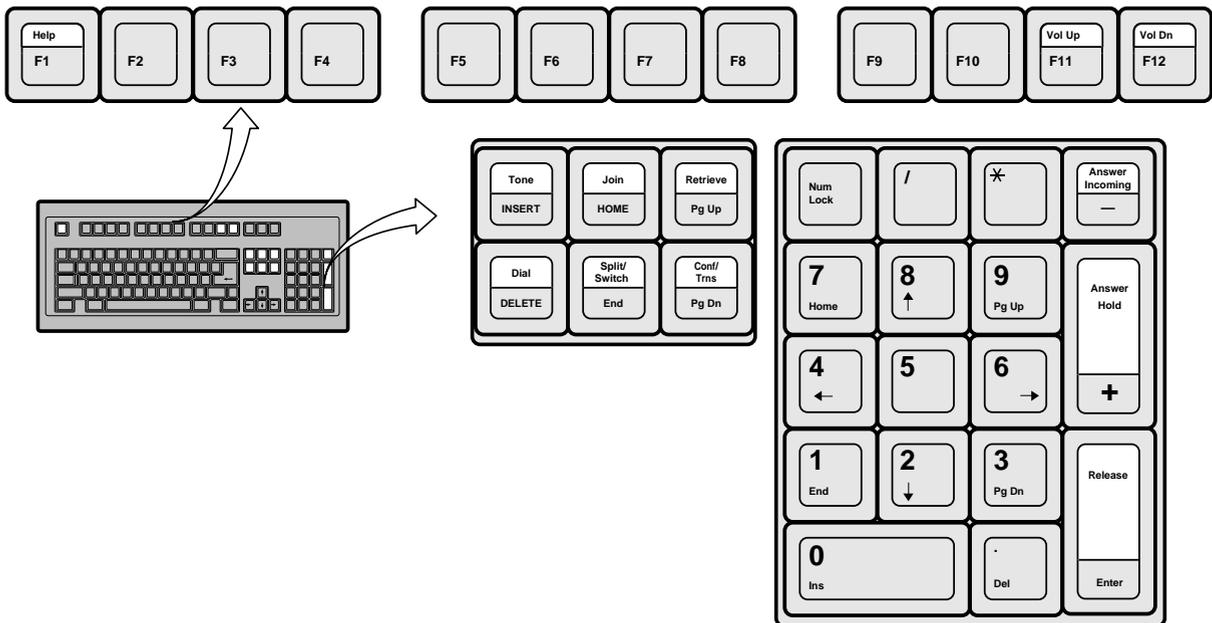
♦ **Strata DK Installation and Maintenance Manual (for DK424)**

In the *Strata DK Installation Manual*, see Chapter 9 for PC Attendant Console installation instructions and minimum hardware requirements. Refer to the *Strata DK Programming Manual* for appropriate programs.

♦ **Strata DK Programming Manual**

The Grand Tour

This chapter describes the PC Attendant Console keyboard, the top level menus, and provides general instructions for navigating through the main screen and the dialog boxes. See the figure below and the following text.



Function Keys

You can use these additional function keys:

F1 for Help

F2~F9 enable you to access the bottom row of eight user buttons (as shown below). Pressing **Shift** + (**F2~F9**) gives you access to the top row of eight user buttons. You can also access these user buttons by clicking them with the mouse on the screen.



F11 for Volume Up

F12 for Volume Down

Special Function Keys

There are six special function keys: **Voice Mail**, **Tone**, **Join**, **Conf/Trns**, **Retrieve**, and **Split/Switch**.

Numeric Keypad

The numeric keypad is kept in the **Num Lock** ON position so that it is a “hot” dial pad. **Answer Incoming**, **Answer/Hold**, and **Release** keys are included on the keypad.

Main Screen

The PC Attendant Main screen (shown below) provides access to features and information on incoming calls, calls on hold, available line groups, station status, and displays a Directory that can be used to transfer calls quickly.

Incoming Call Display

The screenshot shows the PC Attendant Main Screen interface. The title bar reads "220 PC ATTENDANT 220". The menu bar includes "Console", "Features", "Directory", "Messages", "View", "Setup", and "Help". The Feature Toolbar contains various icons for call control. The Console ID Area displays "TALK TO 211 STRATAGY DK 211". The Active Call Window shows an incoming call from "201 201 BRIAN" at "09:42" and "211 STRATAGY DK" at "05:01". The Loop Hold Display shows "Loop 09:42" and "05:01". The Notes Field contains "Answer Incoming". The Status Bar at the bottom displays "Press F1 for help" and "09:36 AM Fri Jun 07".

Feature Toolbar

Menu Bar **Soft Keys** **Console ID Area** **Active Call Window** **Loop Hold Display**

Notes Field

Volume Control Buttons

Status Bar

DSS/BLF Station Directory

16 User Buttons (Programmable Feature Buttons)

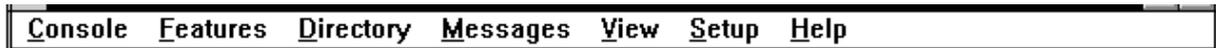
200 Pat Walker	252 Dave Mandeville	262 Sally Lin
201 Brian Henson	253 Bob Lerche	263 Judith Chou
202 Nancy Long	254 Ken Chapman	278 Pete Hlapcich
203 Bob Smith	255 Ed LaBlanca	288 Patricia Waters
204 Jim Brady	256 Joyce Mulcahy	290 Pat Long
207 Larry Meyer	257 Karena Lang	299 Pat Smith
221 Pat Ziegler	258 Michelle Mammolite	500 Pat Walker
244 Pat Lowry	259 Alex Dorfman	A01 CUSTOMER SERVICE
250 Jon Nelson	260 Minh Le	
251 Bill Clinton	261 Ren Chen	

Console ID Area

Displays the console's name and Primary Directory Number [PDN].

Menu Bar

The Menu Bar, shown below, contains seven “drop-down” submenus that enable you to perform commands, access features, or configure the console. Selecting a menu item displays a dialog box or toggles the item.



Console

Controls how the console operates, including: Night Transfer, Position Busy, Date/Time, etc. You will probably change the console settings at the beginning and end of your shift.

Features

Assists you in handling calls, such as Call Pickup, Page Retrieve, etc.

Directory

Where you enter names and phone numbers for the on-line directory. You can also enter titles, departments, and schedules of individuals. The directory contains a search feature. You can choose what information is displayed and the order in which it is shown in the Directory Display field.

Messages

Enables you to use the Message Center for taking, retrieving, and printing messages. You can also save them to a file for transfer to another console.

View

Provides selections for you to determine what information is viewed and how it is displayed. Includes showing or hiding the tool bar or status line and Call Statistics.

Setup

All items in this menu may be password protected (optional). They pertain to console and system administration items that should not be changed without some knowledge of overall system operation.

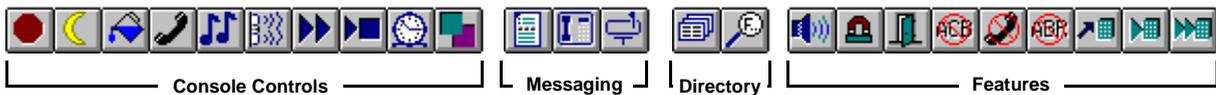
Help

This provides help on Windows-related features specific on-line help for all console operations. This is different from the on-line help for the PC Console, described on page 12.

Feature Toolbar

The Feature Toolbar shown below provides quick access to console controls. You will probably access these control features at the beginning and end of your shift. These controls include setting the console for Night Transfer, turning call overflow and background music settings ON and OFF, putting the console into position busy mode, etc.

The Feature Toolbar displays across the top of the application window, below the menu bar. It is grouped into four functions to make finding the feature easier. When the mouse arrow is positioned on an icon, its callout label displays.



Console Control Icons



Click	To
	Toggle PC Attendant Position Busy ON/OFF
	Setup Night Transfer and Auto Night Transfer
	Toggle the Attendant Overflow ON/OFF
	Toggle the Privacy Button ON/OFF
	Toggle the Background Music ON/OFF
	Reset Alarm
	Setup Call Forward
	Toggle Call Forward Fixed ON/OFF
	Set Timed Reminders
	Set Line Group Restrictions and view Busy/Idle Status

Messaging Icons



Click	To
	Get to the Message Center
	Send LCD Messages
	Message Waiting Light

Directory Icons



Click	To
	View/Add Directory Entries
	Find a Directory Entry

Feature Icons



Click	To
	Access Paging Options
	Use Call Pickup
	To Unlock a Door
	Cancel Callback
	Privacy Release
	Cancel Busy Redial
	Redial Call in ANI List
	Redial Last Call or Saved Number
	Set Speed Dial

Status Bar



The status bar is displayed at the bottom of the PC Attendant window. To display or hide the status bar, highlight Status Bar from the View menu.

The left area of the status bar describes actions of menu items as you use the arrow keys to navigate through menus. This also describes the actions of Toolbar Feature Buttons as you depress them, before releasing them. Then, if you do not wish to execute the command, release the mouse button while the pointer is off the button.

The right side of the status bar shows the date and time.

Incoming Call Display

Number of Incoming Calls shows the number of calls waiting to be answered.

Incoming Call Type displays each type of incoming call waiting to be answered. Call types are shown with black letters except emergency calls which are shown in red.

Answer Incoming Button automatically answers the next ringing call of the type selected. If none are selected, it answers a call from the type at the top of the list.

Active Call Area

Refers to the following three areas.

Active Call Window shows current call information: line, station, and status (e.g., calling, recall, transfer).

Soft Keys functions are defined based upon call handling. Two methods of access: mouse or use the arrow keys to select the soft button, followed by **Enter**. See Chapter 3 for more information.

Notes Field is used for Answer Prompts, Recall Notes, Message Lists, and any information pertinent to the call.

Loop-Hold Display

Loop List shows calls on hold and the duration of hold time. Color of the hold time indicates the hold type:

Red: Emergency Call
Green: Consultation Hold
Blue: Supervised Hold
Black: All others

Retrieve button accesses the calls on hold.

User Buttons

See [‘Function Keys’](#) on [Page 2](#).

DSS/BLF Station Directory

Lists internal [DNs] (Primary DNs and Phantom DNs), distributed hunt group pilots, ACD group numbers (always starting with “A”), and their associated names.

Clicking on a display entry automatically dials the number. (Directory Direct Selection feature.)

Serves as the Busy Lamp Field (BLF):

Black text: Idle

Red text: Busy or DND

Red text on turquoise: Selected display entry

Double-clicking on a display entry dials the number and blind transfers the call automatically.

Keyboard Navigation

The table below shows you how to use the keyboard to navigate within the PC Attendant Console.

Keyboard Keys	Description
Alt+Letter	Selects Main Menu items. Moves directly to the item with the underscored marking. For example, Pressing Alt+I on the Main Screen moves the selection to the Incoming Call Area on the screen. Alt+M opens the Messaging menu.
Letter	Selects submenu items. Pressing the underlined letter of an item selects that item.
Tab	Moves from section to section, or button to button in screens and dialog boxes.
Shift+Tab	Moves from section to section or button to button in the screens and dialog boxes in reverse direction.
Alt+Tab	Moves between open application windows (Windows feature).
Arrow keys	Highlights one of several items from a drop-down box for selection. Also moves from selection to selection or button to button within a dialog box.
Enter (keyboard)	Selects the currently highlighted command button.
Enter (numeric key pad)	Used for Release and Release/Transfer functions on the Main Screen.
Esc	Used to go back to the previous dialog box.
Spacebar	Press to toggle features ON or OFF or select entries in list boxes.

Mouse Navigation

With the mouse, an on-screen arrow or cursor moves in coordination with the position of the mouse on a desktop or mouse pad.

Mouse	Description
Move the mouse cursor onto an item on the screen, then click the mouse button. If there is more than one button, click the left button.	Chooses (highlights) Main Menu Items. For on-screen buttons, it selects that button. (The mouse method combines two steps into one. It selects the button; you do not need to press the Enter key.)
Double-click the button. If there is more than one button, double-click the left button.	Chooses and selects the item (it invokes the action immediately.)

Note For more information on adjusting Windows Controls for the PC Attendant Console (such as keyboard and mouse speed, colors, etc.), see the Appendix.

On-line Help

The PC Attendant Console provides on-line help that guides you step-by-step in using its many features. The help is built into the software and can be accessed using the Help button in dialog boxes or by pressing **F1**.

The on-line help provides:

- ◆ Feature and menu item descriptions.
- ◆ On-screen, step-by-step keyboard and mouse instructions. Click any underlined green words to “jump” to instructions for that item.
- ◆ Definitions of individual terms (green letters marked with a dashed underline).
- ◆ While working with a feature within a dialog box, pressing **Help** displays the step-by-step procedures for performing that particular feature.

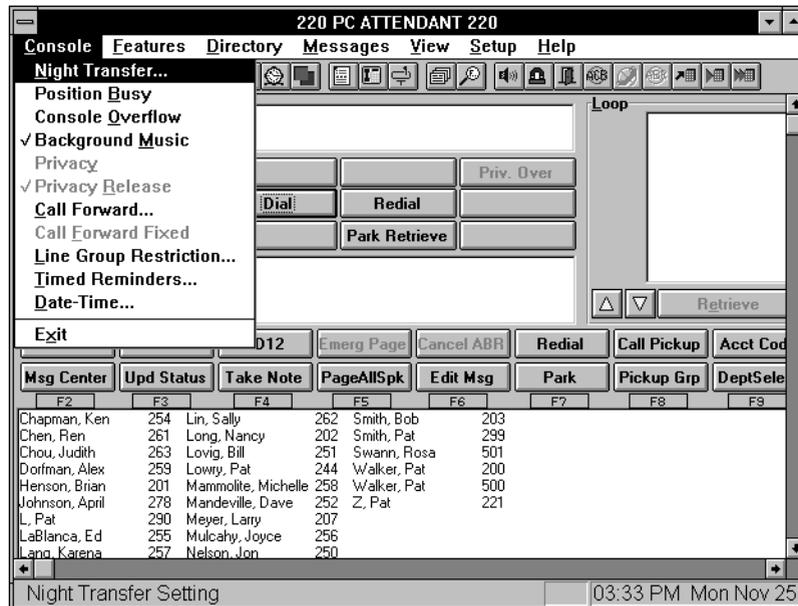
The on-line Help provides the most appropriate information for the current calling conditions.

Console Controls

2

This chapter explains how to set the console control features, such as setting a Call Forward destination, night time call handling, volume controls, etc. Console control features are generally those that you set at the beginning and end of your shift.

There are icons for each of these controls just under the Menu Bar at the top of your screen. Console controls are also found under “Console” on the Menu Bar as shown in this figure.



Night Transfer

You can set the console to transfer after-hours calls to a different station. After Hours call routing can be set for three different modes: Day, Day2, and Night mode. Night Transfer can be set for up to four Tenants. In most cases, there is one Tenant (one company) being handled by a single console.

► To set Night Transfer



1. From the Menu Bar, select Console then Night Transfer.
2. From the Night Transfer dialog box, select a Night Mode from the Tenant 1 drop-down box. Either two or three settings are allowed (Day, Day2, Night), depending on the Telephony Setup parameter for Night Modes.
3. If there is more than one Tenant, choose the next Tenant box and select a Night Mode and Day, Day2, Night settings.
4. Optional: To control Night Transfer automatically, toggle Enable Automatic ON (“X” in the box).

To control Night Transfer manually, toggle Enable Automatic OFF (No “X” in the box).

5. Select the OK button.

Time	Day of Week	Count	Mode
07:00	MTWTF	1	Day
08:00	MTWTF	1	Night
09:00	MTWTF	1	Day
10:00	MTWTF	1	Night
11:00	MTWTF	1	Day
12:00	MTWTF	1	Night

The DK is now in the new Night Mode setting for the selected tenants.

Automatic Night Transfer

Automatic Night Transfer allows the Night Mode to be set by a weekly/time of day schedule for each of the four tenants on the Strata DK system.

► To set Automatic Night Transfer



- From the Menu Bar, select Console then Night Transfer.
- Set Enable Automatic to ON (make sure box has an “X”).
- From the Night Transfer dialog box, select the Add button to enter new settings and the Delete button to remove unwanted entries.
- If you selected the Add button, set up schedules from the Add Night Transfer dialog box:
 - Select the Mode (Day, Day2, Night).
 - Select Time (two digits, 24-hour format).
 - Select Days (reverse video indicates days selected).
- Select the Close button to save, or the Add button to enter another time setting (at least 5 mins. difference).

Time	Days	Count	Mode
07:00	MTWTF	1	Day
08:00	MTWTF	1	Night
09:00	MTWTF	1	Day
10:00	MTWTF	1	Night
11:00	MTWTF	1	Day
12:00	MTWTF	1	Night

Note There must be at least 5 minutes between time settings for the same tenant. Example: if Day 1 begins at 07:00, then Night 1 should be 07:05 (or later).

Position Busy

Position Busy lets you place a console in unattended mode. In this mode, new calls are sent to the other console(s). Held and unanswered transferred calls continue to recall the console that processed them.

Only use Position Busy when there is more than one Attendant Console. The default setting is for single console operation with Position Busy disabled. To enable the feature, Console Settings must be set for Multiple Console operation from the Setup menu.

When the last console in the attendant group is placed in Position Busy mode, the entire group is considered Unattended. Consoles should then set Call Forward and/or Night Transfer so that incoming calls are rerouted to another destination. (Night Bell, an alternate answer position, etc.)

The console is placed in a Position Busy Pending state if you are talking to a party, making an outgoing call, holding calls, or if you are in ring transfer mode. During this state, the console cannot receive any new calls. When you disconnect from the current call and/or process held and unanswered transferred calls, the console enters Position Busy mode.

► To access Position Busy



1. From the Menu Bar, select Console. Toggle Position Busy ON (check mark) or OFF (no check mark).
2. Clear the Position Busy alert pop-up window by pressing the **OK** button.

A pop-up window alerts you when Position Busy is ON.

Optional. Leaving this displayed provides a clear visual indication of Position Busy status.

Console Overflow

When Console Overflow is ON, new incoming calls that have been waiting too long are routed to another station or answering device. Calls overflow based upon a system timer.

► To toggle Console Overflow



- From the Menu Bar, select Console. Toggle Console Overflow ON (check mark) or OFF (no check mark).

“OVERFLOW ON” or “OVERFLOW OFF” shows for a few seconds in the active call window - depending on the toggle position.

Background Music Over External Speakers

Background Music (BGM) over external speakers can be turned ON and OFF from the Attendant Console or the System Administrator’s station (typically station 200).

► To toggle Background Music



1. From the Menu Bar, choose Console.
2. Toggle Background Music ON (check mark) or OFF (no check mark).

When toggled on, music plays over the external paging system.

“BGM ON” or “BGM OFF” displays in the active call window - depending on the toggle position.

Privacy

If your Attendant Console is programmed for the Privacy feature, you can block station users with Privacy Override from entering CO line calls. The Privacy feature does not block Busy Override or Executive Override.

► To toggle the Privacy feature



- From the Menu Bar, choose Console. Toggle Privacy ON (check mark) or OFF (no check mark).

When toggled ON, the Privacy feature is enabled.

Privacy Release

When you activate Privacy Release, other stations and Attendant Console users can enter your call on a CO line.

Privacy Release is assigned for each console or station in system programming. Up to two attendant consoles and/or stations can enter an existing CO call, allowing up to three consoles and/or stations to be connected.

► To toggle Privacy Release



- From the Menu Bar, choose Console. Toggle Privacy Release ON (check mark) or OFF (no check mark).

When toggled ON, the Privacy Release feature is enabled.

Call Forward

You can forward calls from the Attendant Console (internal) to stations and outside (external) telephone numbers.

Internal Call Forward

The following Internal Call Forward selections are available:

No Call Forward disables this feature.

All Calls forwards all calls immediately. The PC Attendant Console does not ring.

Busy forwards calls immediately if you are in Position Busy mode.

No Answer forwards calls if you do not answer in the specified time.

Busy/No Answer forwards calls immediately when you are in Position Busy mode. Forwards when not answered within the specified time when not in Position Busy.

Fixed Set forwards all calls immediately to a preset internal destination. This is not associated with Fixed Call Forwarding programmed in the DK system. The destination is defined in the Call Forward Menu (see below).

► To set Internal Call Forward



1. From the Menu Bar, choose Console, then Call Forward.
2. From the Call Forward / Voice Mail dialog box, click an “X” into the desired Call Forwarding box.

Call Forward / Voice Mail

Internal Call Forwarding

No Call Forward Destination:

All Calls

Busy

No Answer No Answer Time in Seconds:

Busy/No Answer Fixed Destination:

Fixed Set

External Call Forwarding

External Set

3. Choose Destination and enter a number
or...
select a number from the Fixed Destination drop-down box.

Optional: Select No Answer Time in Seconds and enter the seconds the call rings before forwarding.

4. Select OK.

External Call Forward

Enables you to forward new incoming calls to a destination outside the system. Only incoming calls over CO lines dedicated to the console and/or Direct In Dial (DID) line calls will forward. Other Call Forward modes can be set simultaneously while Call Forward - External is ON.

► To set Call Forward to an external station or device



1. From the Menu Bar, select Console, then Call Forward.
2. From the Call Forward/Voice Mail box, enter the destination telephone number (outside the system) into the External Call Forwarding box.
3. Click an “X” into the External Set box.

Call Forward / Voice Mail

Internal Call Forwarding

No Call Forward Destination:

All Calls

Busy

No Answer No Answer Time in Seconds:

Busy/No Answer

Fixed Set Fixed Destination:

External Call Forwarding

External Set

OK Cancel Help

4. If the Call Forward destination is over a tie or CO line, place the CO line access code in front of the external telephone number.

The code entered for external destination is stored in speed dial location 49.

Call Forward Fixed

Using the Call Forward feature, a station user can route all calls to an alternate station. A feature button is selected to put that station in Call Forward mode to a fixed station. For example, the station may be programmed to forward to the attendant station or a voice mail system.

► To toggle Call Forward Fixed ON/OFF



- From the Menu Bar, select Console, then Call Forward Fixed.

To change the Call Forward destination, follow the Internal Call Forward steps on [Page 19](#) and record a telephone number in the Fixed Destination box.

Note If this item cannot be selected, a Fixed Destination was not entered.

Line Group Restrictions

The Line Group Restrictions feature lets you restrict access to outgoing CO line groups on an as-needed basis. This feature also lets you restrict outgoing calls on two-way CO line groups. This enables you to control outgoing traffic on heavily-used line groups during busy hours.

Once a line group is restricted, station users cannot access the group on an outgoing basis except through LCR and/or an Attendant (Access an Outside Line for a Station, Three-Way Calling, Four-Party Conference, Executive Override, Hold Pickup, etc.). This restriction affects all stations equally.

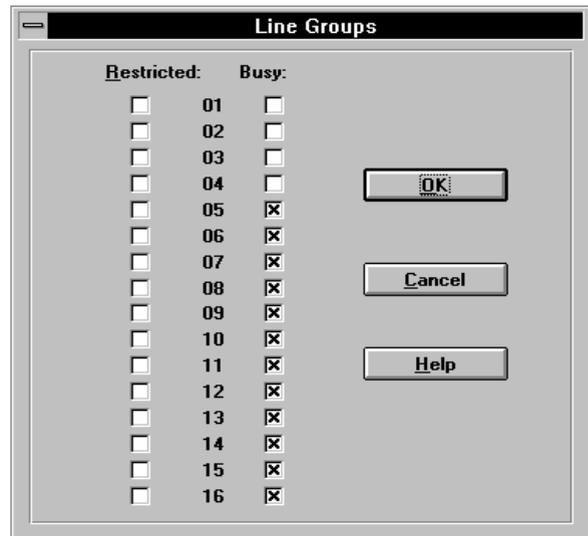
► To restrict a Line Group



1. From the Menu Bar, choose Console, then Line Group Restriction.
2. From the Restricted row in the Line Groups dialog box, click an "X" into the box(es) next to the line(s) you want to restrict.

The "X" in the Busy column shows busy/idle status and cannot be selected.

3. Select the OK button.



Timed Reminders

Use this feature to send a reminder message to the active call window at a specified time. To define these messages, see the Set Messages section on Page 83.

► To set Timed Reminders



1. From the Menu Bar, select Console, then Timed Reminders.
2. From the Timed Reminders dialog box, enter the time. Use the 24-hour format (e.g., 2 p.m. is 14:00).
3. Select a message from the drop-down list.
4. If you want to send the message daily, click an (X) in the Daily box.
5. Repeat Steps 2~4 for any additional reminders you wish to set.
6. Select the OK button.

	Time	Daily	Message
1:	14:00	<input checked="" type="checkbox"/>	61 IN A MEETING
2:		<input type="checkbox"/>	
3:		<input type="checkbox"/>	
4:		<input type="checkbox"/>	
5:		<input type="checkbox"/>	

Buttons: OK, Cancel, Help

Leaving the Time box blank deactivates the feature.

The message is sent at the selected time.

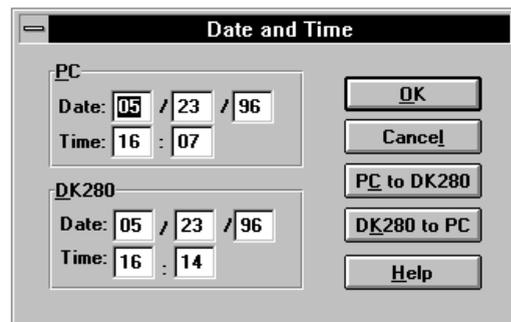
Date and Time

The Date and Time can be set from two different sources: the PC's internal clock or the DK system clock. Once you set either the PC or DK clock, then you can "send" the date and time to the other one. The time for both are shown in the dialog box so that you can make sure that they are set for the same time.

Also, if there is more than one console, you can set the time from one PC Attendant Console, then send the time to the DK, and then send the DK time to the second PC Attendant Console.

► To set the Date and Time

1. From the menu bar, select Console, then Date and Time.



2. Update the PC date/time *or* the DK date/time. Select the OK button to update either the PC or the DK only.
3. To transfer the update to the other, click on the PC to DK280 or DK280 to PC button.

Volume Control

Volume control can be set while the console is idle or when you are on a call using the volume up/down arrow keys.

► To adjust Ringer Volume



- While *the console is idle*, click the up/down icons or...
press the **Vol Up**/
Vol Dn keys.

Each click increments the volume.

Holding down the **Vol Up**/**Vol Dn** keys to make precise volume settings may be difficult if they are programmed to “fast-repeat.”

See ‘[Windows Controls](#)’ on [Page 123](#).

► To adjust Handset Volume



- While *on a call*, click the up/down icons or...
press the **Vol Up**/
Vol Dn keys.

See above comments on volume buttons.

This chapter contains instructions for the most commonly used Attendant functions:

- ♦ [Incoming Calls](#)
- ♦ [Transferring Calls](#)
- ♦ [Voice Mail](#)
- ♦ [Placing Calls](#)
- ♦ [Voluntary Account Codes](#)
- ♦ [Calling Options](#)
- ♦ [Dialing for Others](#)
- ♦ [Conference Calls](#)
- ♦ [Call Splitting \(Split/Switch\)](#)
- ♦ [Trunk-to-trunk Connections](#)
- ♦ [Call Supervision](#)

Many of the calling features in this chapter take advantage of the “hot” keyboard. As soon as you begin typing the name or extension number of an individual, the PC Attendant Console searches for a match and highlights that person in the directory.

Incoming Calls

You can answer incoming calls with either the **Answer** or **Answer Incoming** keys. The type of incoming call is displayed in the Active Call Window. The actual wording for call types is set in system programming.

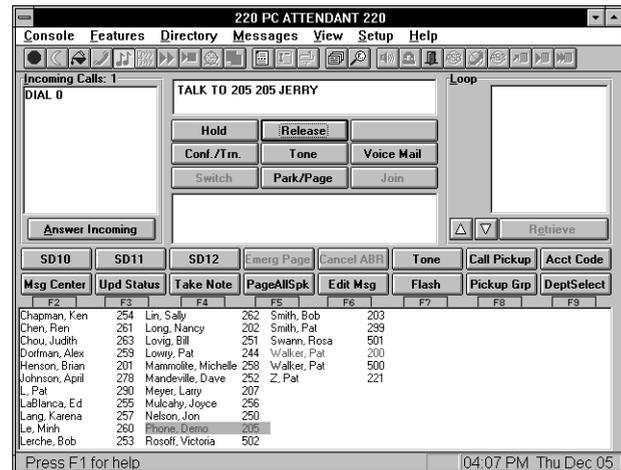
► To answer Calls by Priority

- Select the **Answer** button.
See “[Answered Call Options](#)” on [Page 30](#) for more call handling options.

Calls coming into the console are prioritized in the queue according to their answer priority. Emergency calls are always highest priority.

► To select which Incoming Call to answer

1. Highlight the call type to answer from the incoming call display, such as “Dial 0”.
See “[Incoming Call Types](#)” on [Page 29](#) for more information.



2. Select the **Answer Incoming** button.
See “[Answered Call Options](#)” on [Page 30](#) for more call handling options.

If you skipped Step 1 and just pressed **Answer Incoming**, the call at the top of the list is answered.

Incoming Call Types

See the table below for Incoming Call types.

Incoming Call Type	Active Call Window	Description
Emergency	206 EMERGENCY CALL	Emergency calls from station users who pressed [DN] + #400. Emergency calls have the highest answering priority and appear in red.
Park Recall	LINE 1 PARK RECALL ORBIT 900	Park Recalls alert the console after the Park Recall timer expires.
Transfer Recall	LINE 1 RECALL FROM 206 206 RECALL	Transferred calls not answered at the destination station before the ring transfer timer expires.
Hold Recall	LINE 1 RECALL 206 RECALL	Hold recalls that alert the console after the Hold Recall timer expires.
Transfer	LINE 1 TRANSFERRED FROM 206	Incoming line calls transferred to the Attendant.
Line Group XX		New incoming CO line calls, where XX is the group number (01~16). Names can be programmed in Setup Line Settings.
Dial 0	206 CALLING	Incoming calls from station users who pressed [DN] plus 0.
[PDN]	206 CALLING	Incoming calls from station users who pressed [DN] + XXX or Call Forward to XXX or 0, where XXX is the Attendant Console's [DN].

Notes

- ◆ [DN] refers to any Directory Number button (also known as an Extension or Intercom Number).
- ◆ [PDN] refers to Primary Directory Number button (the Extension Number for your telephone).
- ◆ Calls transferred to Automatic Call Distribution (ACD) groups do not recall.

Answered Call Options

See the table below for Answered Call Options.

Option	Page	Option	Page
To place a call on Hold	30	Dialing a Number for a Caller	46
To use Automatic Hold	31	Performing Through Dialing for a User	47
To transfer a call to an individual	32	Trunk-to-trunk Connections	52
Taking Notes About a Call	36	To make a trunk-to-trunk connection	52
To transfer to a PBX or Centrex system	34	Call Park and Page	66
To use Department Search with Call Transfer	37	To complete a message started earlier	83

► To place a call on Hold

- Select the **Hold** button.

The call appears on the Loop List. If a Note were taken, that Note appears in the Hold Window as a reminder of who is holding.

➤ **To retrieve a held call**

- Double-click on the held call in the Loop box
...or
- 1. Highlight the held call in the Loop box.
- 2. Select the **Retrieve** button.

The call moves from the Hold Loop to the Active Call Area. Pressing the **Retrieve** button when a call is not highlighted always selects the call at the top of the list.

➤ **To use Automatic Hold**

- While on a call, select the **Answer Incoming** button to hold the existing call and make a new call.

The call is put on hold and answers the next call.

➤ **To switch between held calls**

1. When two calls are on hold, highlight the held call in the Loop box
...or
select the held call.
2. Select the **Retrieve** button.

The Held Call moves to the Active Call Area and the active call moves into the Hold List. If Automatic Hold is not active, the active call disconnects.

Note The above items require setting the option “Automatic Hold” in the Setup menu or you may drop calls.

Transferring Calls

With the Auto Dial feature, you can transfer a call by typing someone's name. The Attendant Console also provides information on the Conference/Transfer screen so that you can better respond to callers. In addition to the basic conference/transfer features, the PC Attendant provides you with a variety of transfer options.

► To transfer a call to an individual

1. While connected to the current call, type a name, (first or last) or an extension number.

When you begin typing, the Conference/Transfer dialog box opens. If the dialed party is busy, an "X" appears in the Busy box.

2. If Auto Dial is on and a match is found, the system Auto Transfers
...or

If Auto Dial is off and a match is found, press **Enter**. The PCATT will perform either a Blind Transfer or an Announce Transfer based on Setup.

If no match is found, in the Conference/Transfer dialog box and highlight the name desired in the Number drop-down box. Then select Transfer (or conference to announce first).

You have the following options;

- To transfer, select the Transfer button
...or

click on the name or number in the directory.
- To announce a call, select the Conference button, announce the call, then select the Transfer button.
- To transfer to voice mail, select the Voice soft key to toggle the ringing station to Voice Announce
- To supervise a call, select the Supervised button.
- To Camp-on, select the Transfer button.

The console has an option to transfer “blindly” or “supervised” upon pressing **Enter**.

The complete directory information for the selected party is shown on the screen.

This is sometimes called a “blind” transfer. The call immediately rings the called party. If they do not answer within a certain time (set in system programming), the call will ring back to your console.

If the console is set for Default Transfer, the call will transfer immediately. If it is not set, you can announce the call (see the following procedure). For more information, see “[Default Transfer](#)” on [Page 99](#).

If the system is set up to ring, the Voice soft key displays.

The call is allowed to transferred and the console goes idle, but the call remains on a loop. You can click on the call and re-enter the call.

When you camp a caller onto a busy line, the caller will ring through to the busy party as soon as their phone is idle.

- To return to the original part, close the Transfer dialog box by selecting Cancel or press the **Esc** key.

The operator maintains a path with the original party until a selection button is chosen.

➤ **To transfer to a PBX or Centrex system**

1. While connected to the current call, select the **Conf / Trn** button
...or
enter the name (first or last) of the desired party. When you begin typing, the Conference/Transfer dialog box opens for name or number entry
2. Select the **Flash** button.
3. Wait for an answer, select the **Release** button.

This enables the called person to answer before hanging up to ensure call transfer.

➤ **To transfer a caller back out on another trunk**

1. While connected to the current call, select the **Conf / Trn** button
...or
enter the name of a directory entry setup to include the trunk access code plus the outside number.
2. If no directory entry exists, enter the outside number in the Number field.

The directory entry does not display in the Directory/BLF field, but displays in the drop-down list.

3. Select the line, line group, or LCR after closing the drop-down Number field by clicking on the arrow to the right of the field.
4. Click on Conference.
5. Click on the soft key Join.
6. Click Exit to leave the two parties connected
...or
click Split to return to the original caller.

Current call holds on a loop.

The operator and two lines are joined.

The Strata DK must be programmed to allow for trunk to trunk conferencing.

Taking Notes About a Call

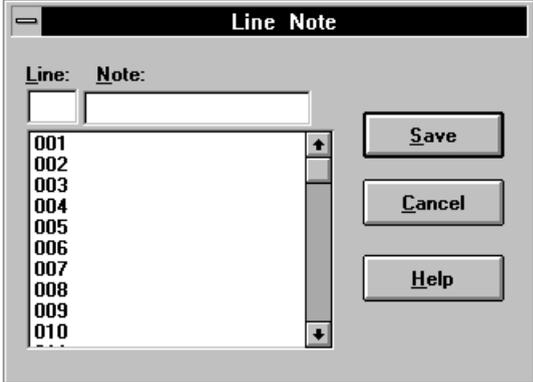
You can write a short reminder note to help you identify who the caller is or who is waiting on a particular line. The note appears on-screen next to the line number.

► To take a note

1. While connected to the call, from the Main Screen, select the Take Note user button.

Note If you do not have the Take Note button, it has not been assigned to your console.

2. In the Line Note dialog box, enter a short Note (16 characters maximum) to attach to the call.
3. Select Save (or press **Enter**) to save the note.

The image shows a dialog box titled "Line Note". It has a header bar with the title. Below the header, there are two input fields: "Line:" and "Note:". The "Line:" field is currently empty. The "Note:" field is a larger text area, also empty. To the right of the "Note:" field is a vertical scrollbar. Below the "Note:" field, there is a list of line numbers from 001 to 010, with a vertical scrollbar to its right. At the bottom right of the dialog box, there are three buttons: "Save", "Cancel", and "Help".

You can use the note to record information about the call. The note shows in the Hold window or in the Notes window when a call is recalled to the console.

The note displays with the line number in the Loop screen when the call is held. If the line recalls the console, the name displays in the Information window. The note stays with the call until it is disconnected.

Using Department Search with Call Transfer

► To use Department Search with Call Transfer

1. From the Main Screen, select the Dept Select user button.
2. From the Department Transfer dialog box, select the desired name
...or
enter the department name.

If the Dept Select button is not displayed and available, it has not been assigned to your console.

You have the following options:

- To transfer, select the Transfer button.
- To announce the call, select the Conference button, announce the call, then select the Transfer button.
- To supervise the call, select the Supervised button.

Voice Mail

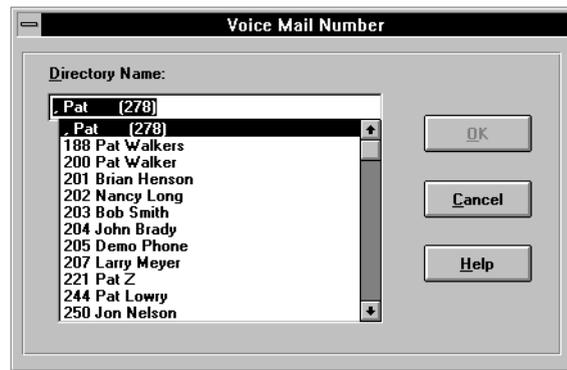
The PC Attendant Console is compatible with the Toshiba Strategy or VP Voice Processing systems. Voice Mail can be used as a Night Transfer location or to answer your calls when you are busy or not available.

► To call or transfer a call to a voice mailbox

1. When you are on a call, select the Voice Mail button
...or
press the Transfer VM button in the Conference/Transfer dialog box or Dialing dialog box after selecting a name.
2. From the Voice Mail Number dialog box, select a name from the directory or type a name or number.

Go to the directory to select the person whose mailbox is to be opened.

3. Select the OK button.
4. When the voice mail answers and you can hear the opening greeting, click on the Transfer button.



You hear the Voice Mail greeting.

The PC Attendant Console calls the voice mail pilot.

Console setup settings must have the Voice Mail Pilot number and prefix digits programmed in the Trans VM Settings section.

The PC Attendant Console uses the mail box for the extension found in the directory.

► To manually connect to Voice Mail

1. Dial the Voice Mail code.
2. From the Main Screen, press the **Tone** button from the keyboard and dial to the voice mail.



3. To close the out Dialing Dialog box, click close.

The dialog box clears while remaining on the connection.

Placing Calls

Calls can be placed using the Busy Lamp Field (BLF), or with the keyboard or Dial button as shown below.

► Dialing with the Busy Lamp Field (BLF)

- Select the desired station in the BLF directory display on the bottom of the screen.

200	Pat Walker	252	Dave Mandeville	262	Sally Lin
201	Brian Henson	253	Bob Lerche	263	Judith Chou
202	Nancy Long	254	Ken Chapman	278	April Johnson
203	Bob Smith	255	Ed LaBlanca	290	Pat L
205	Demo Phone	256	Joyce Mulcahy	299	Pat Smith
207	Larry Meyer	257	Karena Lang	500	Pat Walker
221	Pat Z	258	Michelle Mannolite	501	Rosa Swann
244	Pat Lowry	259	Alex Dorfman	502	Victoria Rosoff
250	Jon Nelson	260	Minh Le		
251	Bill Lovig	261	Ren Chen		

Press F1 for help

08:16 AM Tue Jul 23

The BLF display may show station number or names, plus station numbers. Selecting any name or number causes that station to be called.

► Dialing with the Keyboard or Dial button

1. Type the name or number of the party to call
...or
select the on-screen Dial button, then select a name from the directory.

The Dialing dialog box appears when you begin typing. When the program finds a match in the directory, that name is highlighted.

If the Auto Dial is on and a match is found in the directory, the number is automatically dialed.

PDN is the default selection.

The toll restriction override code must match that assigned in the system for the call to proceed.

The account code must be a minimum length as defined by the Strata DK or match a verified account code.

- (Optional) If you are dialing an outside number, enter or select a Line, Line Group, or LCR. (“X” is selected.)
 - (Optional) Enter a toll restriction override code: select the T. R. Override Code box, enter the code.
 - (Optional) Enter an account code: Selecting the entry box, enter a code.
2. From the Dialing dialog box, select the on-screen Dial button.

Toll Restriction Override Codes

Your PC Attendant Console can be restricted from making certain calls. Each console can be allowed or denied specific area and office codes, long distance information calls, international calls, and/or operator-assisted calls. You can override toll restriction at selected consoles or you can change a console's toll restriction class. The console resumes its normal class at the end of the call.

Account Codes

Account Codes can be used for a variety of reasons, including billing, tracking, and line restriction. Account Codes are entered before (Dialing or Forced) or during (Manual) a call. The Station Message Detail Report (SMDR) contains account code call information which can be printed.

Voluntary Account Codes

Voluntary Account Codes are optional and can be entered after accessing a CO line or during a call which you originated or received. Your conversation is not interrupted when you enter an Account Code.

► To use a Voluntary Account Code

1. After accessing a CO line or during a call, select the Account Code button.
2. Enter the Account Code and select the OK button.



The screenshot shows a dialog box titled "Account Code". It features a text input field labeled "Account Code:" with a cursor inside. Below the input field are three buttons: "OK", "Cancel", and "Help".

You hear a half-second tone for a valid code or three short tones for an invalid code. The last code entered is recorded. To re-enter a code, repeat Steps 1~2.

Calling Options

The following summarizes available calling options.

- To change from Ring First instead of Voice First, select the Ring soft key.
- To change from Voice First to Ring First, select the Voice soft key.
- To Hang Up, select the Release button.
- Select the Exec Override button.
- Select the DND Override button.

- Select the Priv. Over button.

This changes the default setting so that you can immediately talk to the called party through their telephone speaker.

This changes the default setting so that the called party's telephone rings.

This enables you to “bargue in” to an existing call.

This overrides the Do Not Disturb (DND) by sending a tone to the called telephone to alert them that a call is waiting.



Note The CO line must be assigned to appear on the console for this feature to operate.

Setting or Cancelling Automatic Callback

After reaching a busy or Do Not Disturb (DND) station, you can set Automatic Callback to have the system call you back when the called station becomes available.

Automatic Callback enables you to be placed in a waiting queue for an available CO line after attempting access to a line group in which all lines are busy. The system calls you back when a line becomes available.

➤ To set or cancel Automatic Callback

- Select the Callback user button, then select **Release**.

This procedure toggles the feature on/off. If the Callback button is not visible after reaching a busy or DND station, the console has not been assigned this button.

➤ To set Automatic Busy Redial (ABR)

- Select the ABR button
...or
select **Conf/Trns**, enter **#44**, then select **Release**.

This procedure toggles the feature ON.

➤ To cancel a callback or ABR



- Select the Cancel ABR button
...or
select **Conf/Trns**, enter **#44**, then select **Release**
...or

From the Menu Bar, select Features. Then select Cancel Callback or Cancel ABR to turn off the features.

Busy Override and Off-Hook Call Announce (OCA)

Busy Override enables you to notify a busy caller that there is another call waiting.

Off-hook Call Announce lets you call and speak through the speaker of an off-hook, busy digital or electronic telephone. The called telephone must be equipped for OCA. Release 3 systems also allow Call Announce through the handset.

► To Set Busy Override and Off-Hook Call Announce (OCA)

-
- Select the Busy Override button.

If the phone is configured for Off Hook Call Announce, announce the call.

Dialing for Others

If a caller has been restricted from placing a call, this option enables you to place the call for them.

Dialing a Number for a Caller

An incoming caller who is restricted from calling may ask you to place the call for them. You can enter the number to be dialed while talking to the caller.

► To dial a number for an internal caller

When connected to the calling party...

- Enter the number to be dialed, including the trunk access code (if needed).

...or

1. Select Transfer.
2. Enter the number to be dialed
3. Select or enter any required lines, codes, or conditions.
4. Select the Transfer button.

The call dials out with the call transferring and the console releases.

► To connect parties if originating call is on a CO Line

-
1. Enter the number to be dialed, including the trunk access code (if needed).
 2. Select the Conference button.
 3. Select **Join**, then Exit.

The call dials out.

Connect the parties together, then release the console from the call.

Performing Through Dialing for a User

► To perform through dialing for a user

- | | |
|---|--|
| 1. When connected to a station, select the Conf/Trns button. | Some callers may be restricted from calling certain numbers and may need you to select a line for them so that they can make their call. |
| 2. Select the Line or Line Group entry. | Choose a line for the call to be placed. |
| 3. Select Transfer. | Dial tone is transferred to the caller. |

Conference Calls

Conference calls can involve up to four parties. You can create conferences through adding parties into existing calls. You also have the ability to enter a call, split and switch between the parties, and join the callers together.

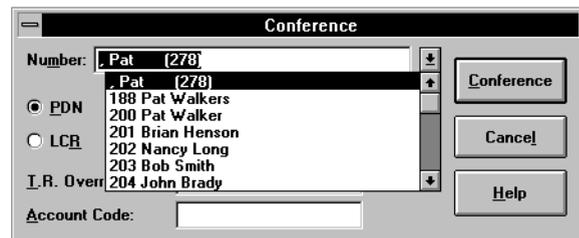
Creating a Three-way Call or Joining Two Calls

You can connect any call in the Loop box with another call using the Join feature. Rather than transferring the call, Join temporarily creates a three-way conference from which you can drop out.

Example: When a caller asks you to have a party paged, you put the first caller on hold, then page the other party. When the paged party calls you, you can use Join to connect the held and paged parties.

► To create a three-way call or to join two calls

1. While on a call, select the Hold soft key.
2. From the Conference dialog box, obtain another party, e.g., page someone to call the operator.



The (first) call is held in the console's Loop box.

3. Upon answering the call, select the held party in the Loop box
...or
highlight the held party name, and then select the **Join** button.
4. Select the Exit button.

You are now connected to the source and destination parties in a three-way conference. The Active Call Window displays XXX + YYY, the source and destination party's station numbers.

The console exits the conference. The source and destination parties remain joined.

Adding a Station to Create a Conference Call

You can add another station to the current call connection to create a conference call.

► To add a station to create a conference call

1. Select the **Conf/Trns** button.
2. Enter the number to dial or dial by name using the directory.
3. Select the **Dial** button. If you do not receive an answer, select the **Return** button.
4. Select the **Join** button after the party answers.

The current call is placed on hold. You hear internal dial tone. If connected to two CO Lines, both will display in the Loop box.

The Conference/Transfer dialog box provides an entry for dialing.

Listen for a busy or no answer so that you can return to the original connection.

All parties are conferenced.

Adding a CO Line to Create a Conference Call

► To add a CO Line to create a conference call

1. While on a call, select the Conf/Trns button.	The current call is placed on hold. You hear internal dial tone. If connected to two CO Lines, both display in the Loop box.
2. Enter the number to dial. Select the line or group to use for the call if an access code was not entered as part of the number.	The Conference/Transfer dialog box provides an entry for dialing, choosing a line, entering account codes or toll restriction override codes if needed.
3. Select the Dial button. If you do not receive an answer, select the Return button.	Listen for a busy or no answer so that you can return to the original connection.
4. Select the Join button after the party answers.	All parties are conferenced.

Call Splitting (Split/Switch)

Call Splitting enables you to alternate between source and destination sides of a call while keeping the two parties separate on the console. This feature can be performed only when the console is involved as the third party in a three-way conference.

► To use Call Splitting

<ol style="list-style-type: none"> 1. After forming a three-way conference, select Split. 2. To alternate between the parties, select Switch. 3. Options: you can disconnect the party that you are connected to by selecting the Release button ...or you can reconnect to both parties by selecting the Join button. To exit from the three-way conference, select the Exit button. 	<p>The destination party is placed on hold, and you are connected to the source party.</p> <p>The source party is placed on hold, and the connection is made with the destination party. Each time the key is pressed, the call alternates between the source and the destination parties.</p> <p>After you press Release, the current party is dropped and you are automatically connected to the remaining party.</p> <p>All parties are connected in a three-way conference. When you exit the conference, the other two parties remain connected.</p>
---	--

Trunk-to-trunk Connections

A trunk-to-trunk connection lets you connect two CO lines, then drop out of the conversation. Both CO lines display in the Loop box until the call is released by the caller hanging up, or until you release the call. CO Lines that do not provide disconnect supervision must be supervised by you or the call disconnects when you release, thus, you are required to periodically monitor these connections to determine when the call is completed.

► To make a trunk-to-trunk connection

1. While on a CO line call, select the **Conf/Trns** button.
2. Select the line or line group (or enter an access code) and enter the number to dial. Select **Conference** or **Supervise**.
3. Upon getting an answer, select a source party in the Loop box.
4. Select **Join** to form a three-way conference.
5. Select **Exit**.

The CO line call is placed in the Loop box. You hear internal dial tone. The Conference/Transfer dialog box displays.

Choose the line to place the call and enter the telephone number to dial. You must supervise (monitor the call for) lines without CO-provided disconnect supervision; otherwise, the callers are disconnected when you select **Release**.

The Active Call Window displays LINE XXX + LINE YYY, the source and destination party's line numbers.

The console exits the conference. The source and destination parties remain joined.

► **To monitor a trunk-to-trunk connection**

1. Select one of the held lines in the Loop box.
2. Select the Exit button if they are still talking
...or
select the **Release** button if the parties have hung up.

You are connected to both CO lines.

You exit the conversation, but the two outside parties remain connected.

CAUTION! When you press **Release**, the call is dropped and all parties are disconnected. Listen to the connection and determine if the call is or is not in progress before deciding to release or keep the call.

Call Supervision

Supervised Loop operation supervises a transferred CO line call. The call may be an incoming call or a call originated at the console. The Supervised Loop is assigned in system programming.

► To supervise a call

1. While on a call, select the **Conf/Trns** button.
2. Enter the number to dial or dial by name using the directory.
3. Select Supervise.
4. After the destination party answers, select the Transfer soft key.

The Conference/Transfer dialog box displays.

The Conference/Transfer dialog box provides an entry for dialing.

► To monitor a supervised call

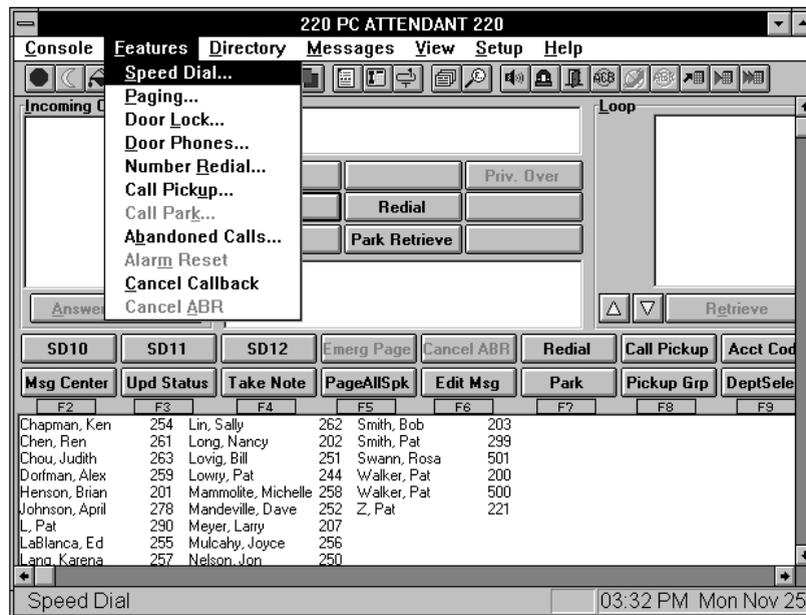
1. Highlight the supervised call in the Loop box.
2. To place the parties back on a supervisory loop, select the Sup Hold soft key.

You are connected to both parties in a three-way conference. System programming may insert a warning tone that all parties hear.

Advanced Calling

4

This chapter explains how to use advanced features which are accessed from the Features menu (shown below) located on the Menu Bar.



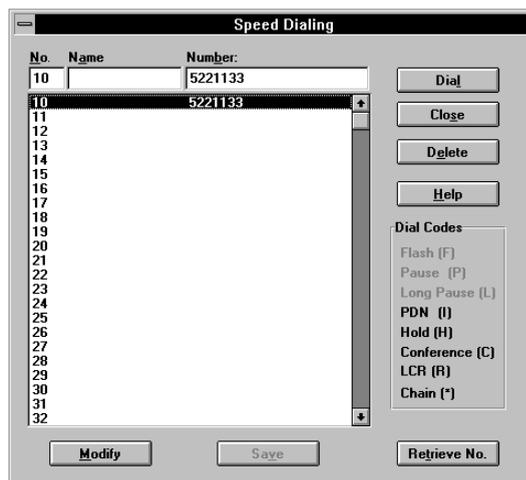
Speed Dial

This feature enables you to store 40 Speed Dial Numbers for your personal use. Up to 100 or 800 system Speed Dial numbers (depending on your Strata DK system size) can be used by any telephone within your system. You can store area and access codes, as well as the following special functions.

► To store Speed Dial numbers



1. From the Menu Bar, select Features. Then select Speed Dial.
2. From the Speed Dialing dialog box, choose the entry to add or change. Select the Modify button.



3. Enter a name, the telephone number.
3. Select the Save button.

The Attendant Console personal speed dial numbers are 10~49; system speed dial numbers are 600~699 or 200~999, depending on your processor.

Dial codes shaded in grey are not available for entry from this console.

Enter a name to identify the Speed Dial number. Maximum of 20 digits, including codes. Entered names are stored in the PC only and are not transmitted to the Strata DK.

Saving system speed dial numbers changes the number for all users in the Strata DK system.

4. Select the Close button when you are done.

Speed Dial Special Function Codes

Press	To Store
F	Hook Flash
P	Pause (1.5 or 3 second pause depending on system programming).
L	Long Pause (10 second pause)
I	PDN (Pressing DN button)
H	Hold
C	Conf
R or 9	LCR access
#7001 ~#7200	For CO Line numbers 1 through 200
801 ~816	For a Line Group
*690 ~*699 (RCTUBA/BB, RCTUC/D) *990 ~*999 for RCTUE/F only	To link a string of Speed Dial numbers

Only 10 System Speed Dial codes can be linked to any other Speed Dial numbers: 690~699 (RCTUA, BA/BB, C/D) or 990~999 (RCTUE/F). A number stored in location 690~699 dials out first, followed by a number chained to 690~699.

You can link any of the console personal numbers (10~49 or 100~109) or system Speed Dial numbers (600~699) to system Speed Dial codes (690~699 or 990~999).

Using Speed Dial Numbers

► To use Speed Dial numbers

1. Select the on-screen Dial button.
2. Enter the name or number in the Spd Dial entry box or...
select a name from the drop-down box.

The screenshot shows a 'Dialing' window with the following fields and options:

- Number:** 200 Pat Walker
- Spd Dial:** (Dropdown menu showing: 11 2135876750 DONNA SMITH, 12 6192243000 LABEL CO, DONNA SMITH, 2135876750 (11), LABEL CO, 6192243000 (12))
- Line
- 001 Line 1**
- I.R. Override:** (Two empty input boxes)
- Busy
- Buttons:** Dial, Show Record, Cancel, Help
- Personnel Information:**
 - First:** Pat
 - Last:** Walker
 - DN:** 200 VM: 200
 - Phone:** (714) 555-2213 HOME, (714) 555-6808 PAGER, (714) 555-1234 CAR
 - Title:** Admin Asst
 - Mgr:** (Empty)
 - Loc:** Main
 - Dept:** (Empty)
 - Work Hrs:** 8:30-5:00
 - Work Days:** MTWTF
 - Note:** On vacation until Jan 17th.

3. Select a Line, Line Group, or LCR, if required.
4. Select the on-screen Dial button.

If outside line or line group is busy:

set Auto Callback by pressing the Callback soft key or...

set Auto Busy Redial by pressing the ABR user button.

You can also enter a trunk access code before Step 1 to select an outside line or line group.

The system dials the telephone number selected.

If this key is not visible, then it has not been assigned to this console.

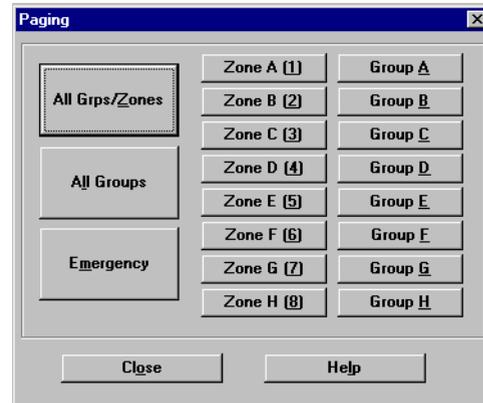
Paging

This section shows you how to use the paging feature.

► To use the Paging feature



1. From the Menu Bar, select Features. Then select Paging.



2. From the Paging dialog box, select the button representing the page group/zone needed.
3. Select the Close button when you are done.

Note The labels on these buttons can be changed in Setup.