Allworx Call Assistant
Quick Reference Guide

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Revised: February 8, 2007

1   Introduction

The Allworx® Call Assistant is a user-friendly graphical application that is intended to be used by an individual functioning in the role of an operator or receptionist. Call Assistant allows operators or receptionists to monitor the state of every line in the system and to effectively dispatch calls by answering, transferring, parking or sending to voicemail. Call Assistant is a fully integrated PC software tool, which makes the operator's tasks easy and efficient. This intuitive software is designed to work in combination with any Allworx VoIP phone. The purpose of this document is to give an overview including system requirements, installation and configuration, and product features and functionality.

2 Views

The application has three distinct work areas or views: My Calls, Directory and Outside Lines. Each view is explained in a separate section.
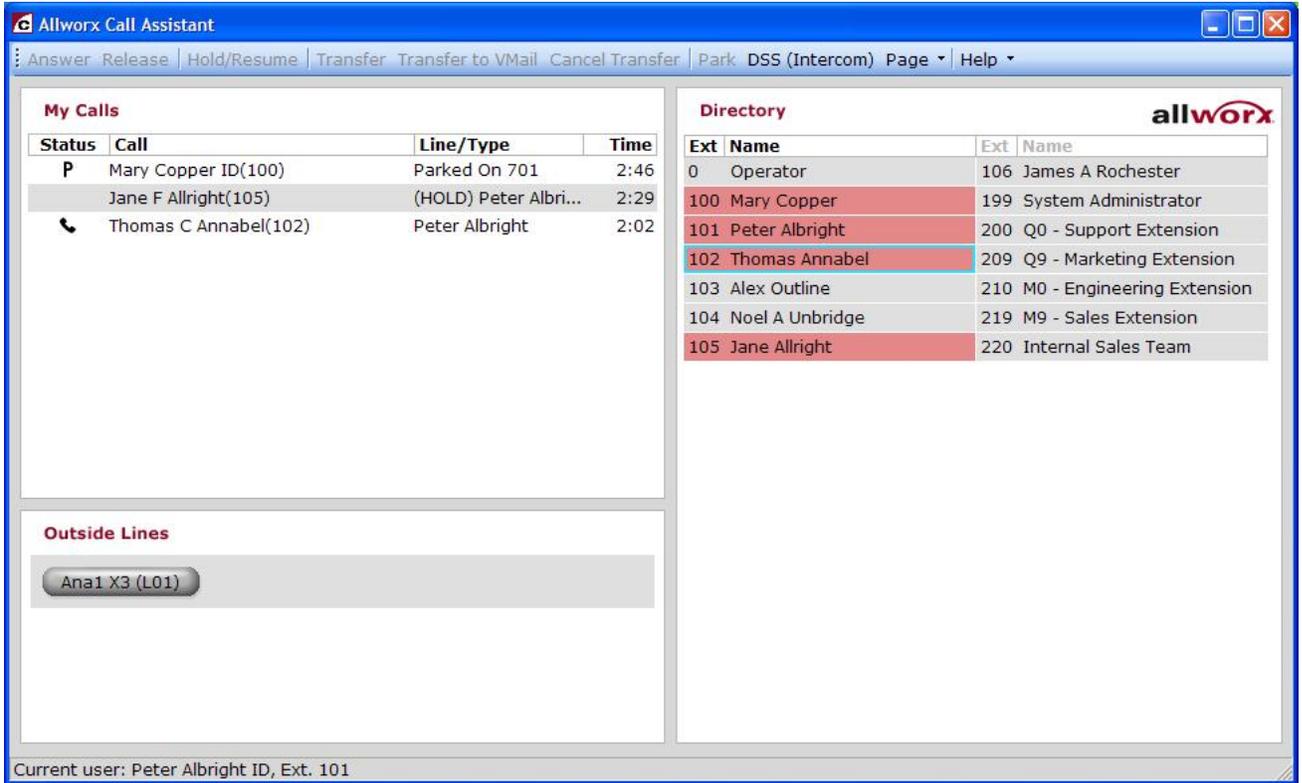
Note: The application window and each of the views can be resized. To resize the view, place the mouse on the boundary and click-and-drag the boundary to the desired size.

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2.1 My Calls View

My Calls shows all calls currently being handled at the operator's extension.

Every incoming or outgoing call associated with the operator's phone appears in the My Calls view. This view shows the following fields:

Status of a call (Ringing, Active, On Hold, Parked, Ended)

Call (caller ID, name and number, if available)

Line/Type (displays the "line" (or appearance) from the operator's phone that the call came in or went out on, additional information such as call is on hold or that the call is parked at an extension)

Elapsed Time of the call in its current state.

The column width for each of the fields can be resized by click-and-dragging the boundary line between the field names.

Many actions can be initiated on these calls, such as: Answer, Release, Hold, Transfer and Park. See Features / Taskbar section for more information.

The calls are ordered with the oldest calls at the top of the view.

2.2 Directory View

The Directory view displays all extensions configured in the Allworx system with extension number and description or user's name. Each extension with Allworx VoIP or analog handsets shows the current status through the use of color:

Green indicates Ringing

Red indicates In Use

Gray indicates Idle

Amber indicates Do Not Disturb.

Extensions with all other handsets types will always display Idle (grey). Various actions can be initiated in the Directory in combination with the taskbar and other work areas. See Features/Taskbar for more information.

The column width can be resized by click-and-dragging the boundary line between the first two columns. The view will fit as many columns as possible without having to horizontally scroll the view.

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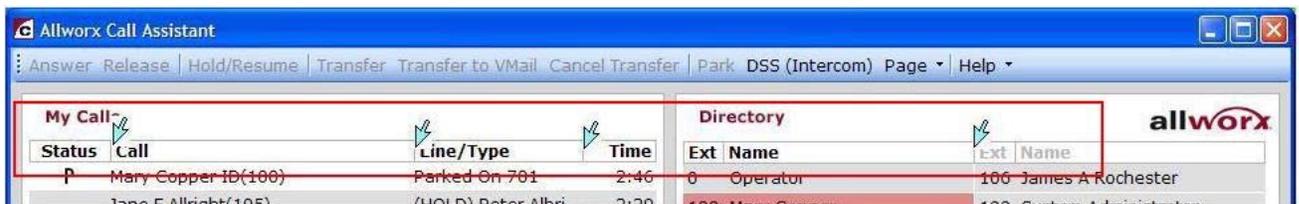
2.2.1 Outside Lines View

All incoming lines, which have been designated for this operator, show up in the Outside Lines area, including both VOIP and traditional CO lines. Each line shows status through the use of color: green indicates Ringing, red indicates Active and gray indicates Inactive.

3   Product Features/Taskbar Options

Taskbar option's states (enabled/disabled) are based on the status of the call currently selected in the My Calls and Directory views. To perform any of the call options on the Call Assistant taskbar, a targeted call in My Calls or extension in Directory must be selected. This is indicated by a border placed around the selected item.
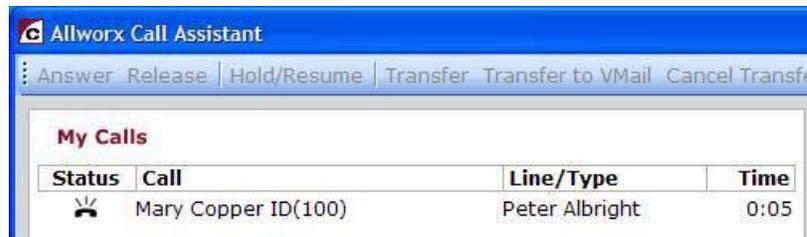
Inbound call unselected
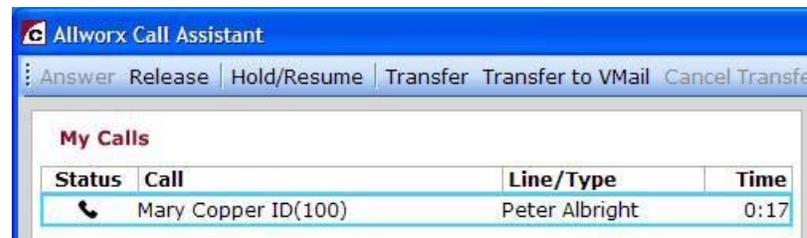
Active call selected

3.1   Answer

An inbound call will be displayed in the My Call view as ringing. This call can be answered by two methods:
1. Select the ringing call in My Calls view and then select Answer on the taskbar
   -OR-
2. Double click on the ringing call in My Calls view

3.2   Release

End or drop the selected call in My Calls view.

3.3   Hold/Resume

When a call is placed on Hold, the Resume Taskbar option becomes active and is used to return to this call. The call indicates Hold in My Calls view by blinking the call status icon.

Note: The call must be selected in My Calls view to Resume.

3.4 Transfer

Transfer moves calls to another person (extension) either as a blind transfer or attended transfer.

Operator performs a blind transfer (transfer to a targeted extension without an announcement) to another extension:

1. Click Transfer on the taskbar: Cancel Transfer option is enabled on the taskbar; all other call options are disabled.

2. Click the targeted extension in the Directory view: Cancel Transfer taskbar option becomes disabled; call is now transferred.

3. Call changes to 'Ended' in My Calls view and then removed from the view.

Operator performs an attended transfer (transfer to a targeted extension with an announcement to the target) to another extension:

1. Place call on Hold by selecting Hold option on the taskbar: calls status changes to "Hold" in My Calls view.

2. Operator calls targeted extension by double clicking targeted extension in Directory view.

3. Targeted extension answer: announce call will be transferred to this extension.

4. Select the origin call (on hold) to be transferred in My Calls view.

5. Click Transfer on the taskbar.

6. Click targeted extension call in My Calls view.

7. Original call is immediately removed from My Calls view and the targeted extension call status changes to Ended and then removed from My Calls view.

3.5 Transfer to Voicemail

The operator can transfer a call directly to a user's voicemail with the Transfer to Voicemail option on the taskbar.

3.6 Cancel Transfer

After Transfer or Transfer to Voicemail has been selected, Cancel Transfer is enabled. Selecting this option will end the transfer and resume the call.

3.7 Park

Park option places a call on hold to one of the designated extensions (701 through 709) that can be retrieved by any handset in the system.

3.8 DSS (Intercom)

Allworx phones on the same system can be used as intercoms with the DSS (Intercom) taskbar option.

1. Select the targeted extension in the Directory view.

2. Select the DSS (Intercom) taskbar option.

3. The phone will announce by ringing, upon completion of this you can start talking.

4. The person you called will hear you over the speaker.

For non-Allworx handset, using the DSS (Intercom) option is functionally the same as placing a call.

3.9 Page

The operator can broadcast a message over the speaker of selected users phones by using the Page option.

Call Assistant will execute one of the Allworx system paging zones to broadcast an announcement by selecting one of the zones from the drop-down menu under the Page taskbar option. This broadcast will go to the users assigned to that paging zone. By selecting the Page option without the dropdown, the first paging zone is executed. See the *Allworx System Administration Guide* for detail on how to configure and assign users to the paging zones.

3.10 Dialing Calls

Double-clicking any extension in the Directory view can place calls. The operator can still use their handset while using Call Assistant. Call Assistant works collaboratively with the phone, extending the phone's capabilities. Dialing of arbitrary numbers can be easily accomplished using the phones dial pad.

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4 Help

4.1 Call Assistant Help

To access the help document from within the Allworx Call Assistant, select the Help option on the taskbar.

4.2 Legend

To see an explanation of all symbols and color states for the various views used by the Allworx Call Assistant, select Legend from the dropdown menu under the Help option on the taskbar.

5 About Call Assistant

The user is provided the software releases details by selecting 'About…' from the dropdown menu under the 'Help' option on the taskbar.
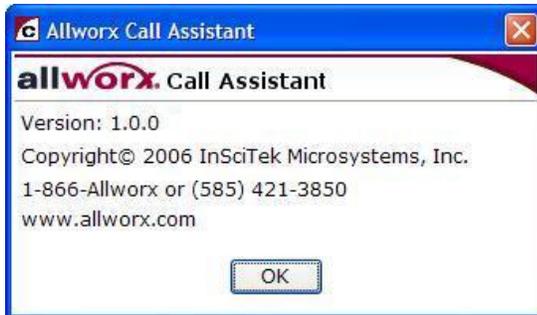
6 Feedback/Support

We would appreciate your feedback and feel free to provide any comments or suggestions to us at support@allworx.com.

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