



A MITEL
PRODUCT
GUIDE

Mitel OpenScape Concierge

OpenScape Concierge V5R0

Plus and Professional

User Guide

10/2025

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1 About this manual

This manual provides an overview of how to use the OpenScape Concierge software. It describes all software functions and the required settings as well as information on the possible configuration.

This manual was written for users and for technical specialists (such as the personnel responsible for integrating, installing and managing the software).

1.1 Terms and typographical styles

This section of the manual describes the terms and typographical styles used in this manual.

1.1.1 Typographical styles

Table: Typographical styles

Convention	Meaning
Bold	Screen buttons and icons, check boxes, option buttons, menu items
<i>Bold italics</i>	Database names, variables, fields, file names
CAPITAL LETTERS	Keys (SHIFT, CTRL, ALT)
<i>Italics</i>	Commands, examples, directory names
Courier	Output texts and error messages, parameters, source text

1.1.2 Terminology

The following terms describe activities that are performed using the keyboard or mouse, as well as states of the command buttons on the screen.

Table: Terminology

Term	Meaning
Press	Press a keyboard key.
Enter	Type in letters, digits, database names, variables.
Enter key	Press the confirmation key (ENTER or Return Key).
Double-click	Press the left mouse button twice in quick succession.
Right-click/right mouse button	Press the right mouse button once.
Select or highlight	Click on an element once with the left mouse button.
Drag	Select an object and then press and hold the left mouse button while moving the object to a new position.
Drop	Release the left mouse button to let go of the dragged object. This step always follows a "drag".

Term	Meaning
Active/enabled	Active commands are displayed on the screen in black text, which means that they are now available to the user. Active symbols are displayed in their normal colors when they are available.
Deactivated/disabled	Deactivated command buttons and symbols are displayed in gray, which means that they are not available to the user.
Button/icon	Button for triggering functions.

1.2 List of abbreviations

Table: List of abbreviations

Abbreviation	Description	Meaning
ACD	Automatic Call Distribution	Automatic call distribution (call center telephone system)
CTI	Computer Telephony Integration	Integration of telephone system and supporting software
COS	Class of Service	A set of Feature which is assigned to your phone
CFW	Call forwarding	An extension which is diverted to another number
DB	Database	
DDI	Dialed Digits Inwards	Extension
DND	Do Not Disturb	
ETB	Electronic Telephone Book	Telephone Book
MCID	Malicious Call Identification	Identifying a malicious call for further investigation
OSC	OpenScape Concierge	Attendant console application
OSCC	OpenScape Contact Center	
ODCPE	OpenScape Desktop Client Personal Edition	OpenScape SoftPhone
UC	Unified Communication	

2 Introduction

2.1 General

OpenScape Concierge is a comfortable, user-friendly attendant console application.

Two variants of OpenScape Concierge are available:

- OpenScape Concierge **Professional**
- OpenScape Concierge **Plus**

OpenScape Concierge **Professional** provides the full range of available functions. OpenScape Concierge **Plus** is a variant which is reduced to essential features.

This document describes functions for OpenScape Concierge Professional and OpenScape Concierge Plus. With and without the OpenScape Contact Center, as well as with OpenScape Voice and OpenScape 4000.

NOTE:

Few figures might display functions, which are only available with Concierge Professional version.

2.1.1 IMPORTANT NOTE for the use of the telephone device:

It is recommended to use headset for the operator's phone device in order to get the best user experience.

The attendant **must not** operate the Concierge workplace by using the phone device. **It is not allowed** to transfer calls, consult calls and hold calls etc. using the phone.

2.1.2 Additional documentation in connection with Concierge

- OpenScape Concierge Professional, Administrator Documentation
- OpenScape Concierge Configuration, Administrator Documentation

2.2 Features Concierge Plus and Concierge Professional

Plus	<ul style="list-style-type: none"> ▪ Works w/o OSCC ▪ CTI functions directly included ▪ Up to 6 Caller queues ▪ Processing queue, personal queue ▪ Up to 4 Users ▪ Grouping of waiting calls ▪ Call push for incoming calls or pick list for waiting calls ▪ Announcements and Music on hold for incoming calls ▪ PABX independent transfer service ▪ Park and append on busy numbers ▪ Transfer of calls by the consultation or direct transfer ▪ Speak to a waiting caller in the processing queue ▪ Automatic recall from the processing queue ▪ DDI related night variants (transfer, announcements, busy tone) ▪ DDI related greetings ▪ Transfer to a free external line ▪ Personal welcome messages 	<ul style="list-style-type: none"> ▪ Efficient search options in the electronic phonebook ▪ Drag and drop for search terms, destinations and comments ▪ Direct dialing through 252 repertory keys ▪ Speed dialing through 20 always visible buttons ▪ Status information of telephone and UC, Circuit, Skype or Microsoft Teams or Unify Office presence status ▪ Synchronization contacts from LDAP, csv file, OLE DB, access to PABX DB (Unify only) ▪ Reporting ▪ Individual display settings per user ▪ Assignment of cost originators for connection processes ▪ Bulletin board ▪ Call history ▪ Highlighting the situation-based behavior for ENTER key ▪ Hotkey support ▪ Personal notice pad ▪ Support for visual impaired people
Professional In addition to Concierge Plus features	<ul style="list-style-type: none"> ▪ Works with or without OSCC ▪ ACD and CTI functions directly included ▪ Up to 15 tenants ▪ Up to 1000 queues ▪ Up to 30 users (OS4000 w/o OSCC) ▪ Up to 40 users (OS4000 w/ OSCC) ▪ Up to 100 users (OSV) ▪ Pager calls ▪ Real time status information ▪ Call coding and support of OSCC post processing ▪ Support of OSCC reason codes ▪ Transfer to OSCC groups ▪ Exchange integration (up to 5) ▪ E-Mail and SMS messages ▪ E-Mail history ▪ Alarm button ▪ Reporting of used search terms 	<ul style="list-style-type: none"> ▪ Internet browser with parameter transfer ▪ External DB support ▪ Standby support ▪ Status information of telephone, UC, Circuit, Skype or Microsoft Teams or Unify Office presence status and calendar ▪ Groups and super groups for selective visibility of service numbers ▪ Location filter in telephone book search ▪ Divisions for pre selection of telephone book data ▪ Up to 25 additional customer specific data fields ▪ Enhanced search and search inside data fields ▪ Phonetic search ▪ Hierarchical indication of contact data ▪ Pictures for contact data ▪ Adjustable absence status for contacts ▪ Bulletin board editable by user

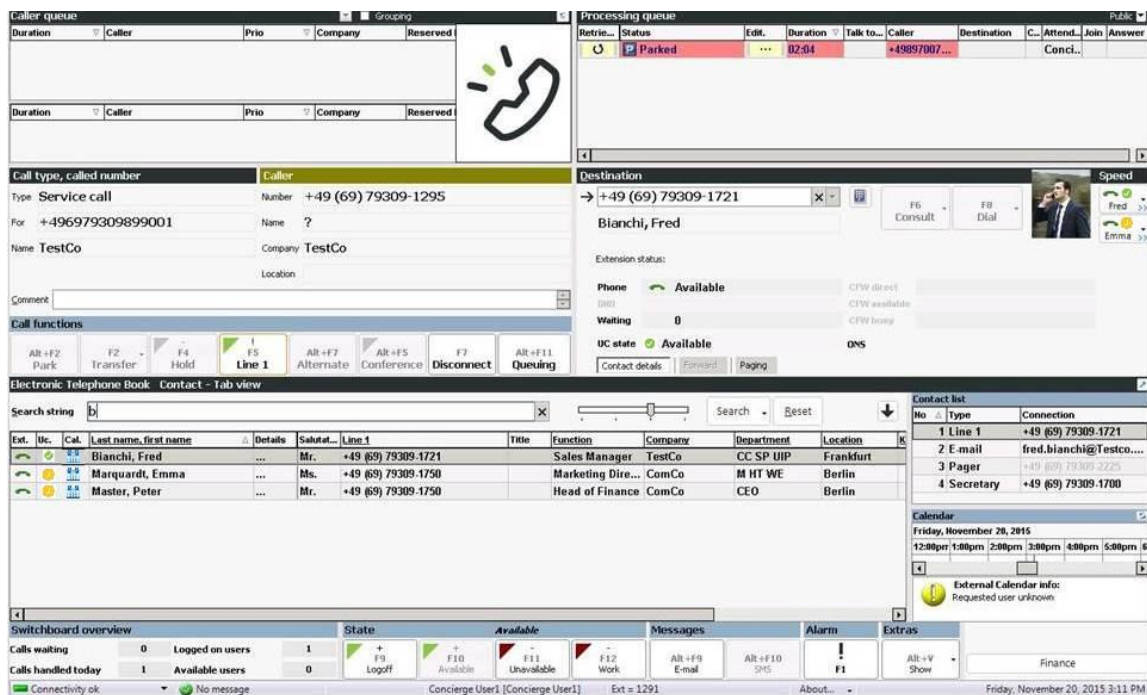
2.3 Main window

Operating elements

The main window is the central operating element of the OpenScape Concierge application. The user interface is structured in following main sections:

Caller queue with Personal caller queue

- Processing queue
- Call type, called number
- Caller
- Data
- Comment
- Destination
 - Contact details
 - Forward
 - Skill groups
 - Paging
- Speed buttons
- Call functions
- Electronic Telephone Book
 - Search and result grid
 - Contact list
 - Calendar
 - Extras
- Switchboard overview
- State control buttons
- Message buttons
- Alarm button
- Malicious Call Identification (with OS4K only)
- Status bar



2.4 Starting and closing Concierge

2.4.1 Starting Concierge

After the OpenScape Concierge installation, a shortcut to the program on the Windows Desktop area can be used to start the program directly.

Procedure

1. Double-click on the icon.



Or:

Under Windows Start menu select: **Concierge** (displayed with the symbol shown above).

The OpenScape Concierge Client application will be started and the logon window will be opened:

2. Select the language and enter the tenant name when you first log on.

NOTE:

The tenant name is identical to the tenant name configured in **Concierge DataCenter**. The selectable user names in the Drop Down menu are corresponding to the configured users in the selected tenant.

3. Select the user.
4. Enter the password and the extension in short format, you **do not** need the full E164 number.
5. Click on **Login**.
The user interface opens. By default the attendant is automatically logged in (Agent State) to receive calls.

NOTE:

The values for tenant, attendant, password and extension are preset the next time the application is opened and can be confirmed, or they can be changed by another user, for example.

By default the login values (language, tenant, user, password and extension) are stored in OSConcierge_LoginData.ini can be found under <drive>:\Users\<user name>\AppData\Roaming\Unify\OpenScape Concierge\OSConcierge.

HINT for Administrators:

In cases when no login dialog is desired - proceed as follow:
Add the parameter: NoAgentLoginForm=1
in **OSConcierge_LoginData.ini** under **[Main]** and after the encrypted login data.

To switch the attendant automatically to “Available” state after login can be configured in Concierge Data Center.

2.4.2 Starting Concierge using Desktop Client application as a Softphone (License Required – For Plus and Professional)

If an available 'SIP client' license exists, it is possible to use the OpenScape Desktop Client Personal Edition as a softphone.

After the OpenScape Concierge Client V5 installation, a shortcut to the OpenScape Desktop Client Personal Edition (ODCPE) on the Windows desktop area will be created.

NOTE: if you want to configure the softphone automatically, there is no need to click on that icon.



After the Concierge Client installation, it is not necessary to configure the ODCPE parameters. It will be automatically configured during the first OpenScape Concierge Client startup if the ODCPE was never started.

During the first OpenScape Concierge Client Startup the following parameters, from the OpenScape Concierge System manager will be used to automatically configure the ODCPE.

Concierge Provider Service

A screenshot of the "SIP Settings" dialog box, "Registration" tab. The "Registrar Host" field is highlighted with a red rectangle. The "Registrar Port" field is also highlighted with a red rectangle. The "Register ID" field contains "CPS001-Env35". The "Domain Name" field is empty. The "Register Interval (sec)" field contains "300".

Field	Value
Register ID	CPS001-Env35
Domain Name	
Register Interval (sec)	300
Registrar Host	80.253.239.150
Registrar Port	5061

Concierge Provider Service

A screenshot of the "SIP Settings" dialog box, "Networking" tab. The "Transport Protocol" dropdown menu is highlighted with a red rectangle. The "Certificate Validation" dropdown menu is also highlighted with a red rectangle. The "IPv4 Address" field contains "localhost". The "IPv6 Address" field contains "localhost". The "Port" field contains "5060".

Field	Value
IPv4 Address	localhost
IPv6 Address	localhost
Port	5060
Transport Protocol	TLS
Certificate Validation	None

NOTE: if the ODCPE was started before first OpenScape Concierge Client Startup, and it is necessary to reset the configuration, you can just remove the folder below from the machine where the client was installed, and run the OpenScape Concierge Client again:

%apptata%\Siemens\OpenScape

NOTE: please be aware if the SIP Concierge configuration changes, it will not be propagated to the Clients. So, the previous NOTE procedure can be necessary to update it automatically.

NOTE: if a different configuration is necessary, you can configure the ODCPE manually anytime with the steps described in the sequence.

NOTE: on some occasions, the prerequisite in the OpenScape Personal Edition V7, Installation Guide must be followed. See ODCPE guides for details.

Prerequisites:

- If you use antivirus software or a firewall such as the Windows firewall, you must configure Unify.OpenScape.exe as a trusted exception in this software for optimum use of the client as a SIP softphone.
Please obtain detailed information about how to configure specific processes as trusted exceptions from the respective product information.

After that, the user will be able to open the Concierge Client using the icon that was created in their windows Desktop area as displayed below:

Procedure

1. Double-click on the icon.



Or:

Under Windows Start menu select: Concierge (displayed with the symbol shown above).

The OpenScape Concierge application is launched, and the login window is displayed.

2. Select the language and enter the tenant name when you first log on.

NOTE: the tenant name is identical to the tenant name configured in Concierge DataCenter. The selectable user names in the Drop Down menu correspond to the configured users in the selected tenant.

3. Select the user.
4. Enter the password and the extension in short format, you do not need the full E164 number.
5. If you want to use a softphone as an extension, you must select the option called "SoftPhone".
6. Note that new fields will appear. These fields are the minimum required to configure the SoftPhone application automatically.

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Concierge

V5.0.8.0

Language: English

Tenant: default

User: User, UserTest [User]

Password: ****

Extension: 554140807628 ☐ SoftPhone

Please log on... [Change password](#) [Login](#) [Cancel](#)

Mitel
Concierge

V5.0.8.0

Please log on...

Language: English

Tenant: default

User: User, UserTest [User]

Password: ****

Extension: 554140807628 ☒ SoftPhone

[Change password](#) [Login](#) [Cancel](#)

☒ SoftPhone Authentication [Settings](#)

Login: Extension_1344

Password: *****

7. If the SoftPhone requires authentication (digest authentication), check the authentication option and enter the credentials (number and password). Otherwise, do not select the option and leave the fields blank.
8. Click on the Login button to proceed with the login and to open the OpenScape Desktop Client Personal Edition automatically. It will be configured automatically.

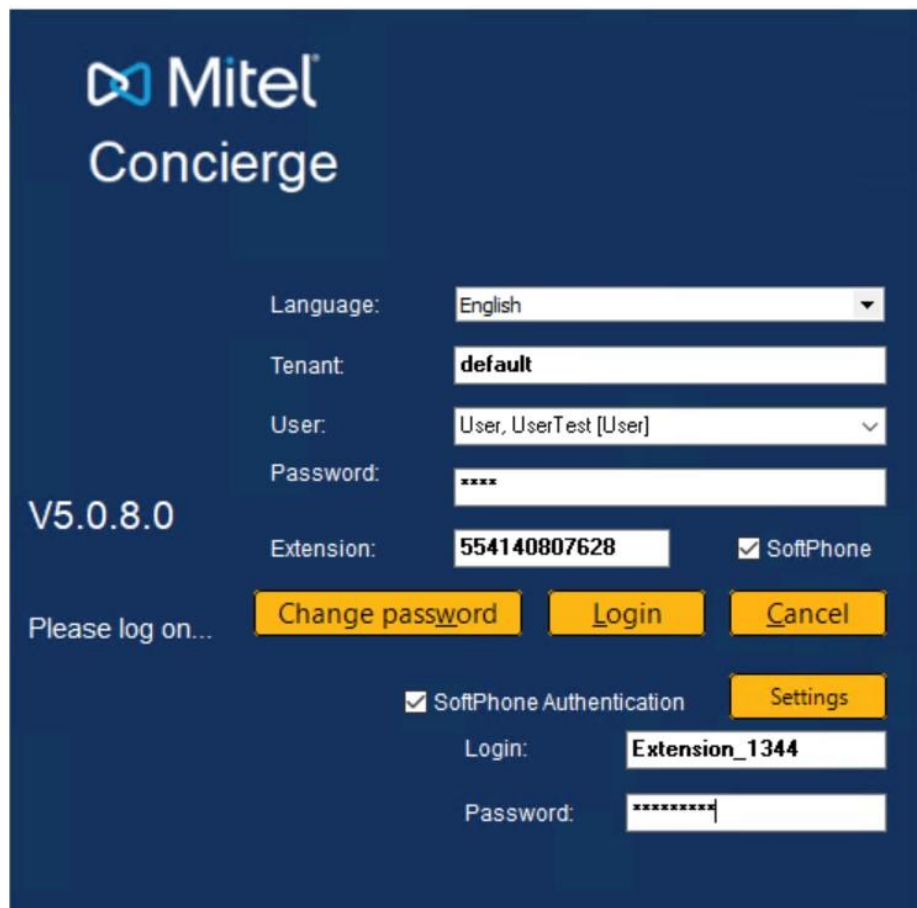
NOTE: the SoftPhone login ID could be different from the extension number.

NOTE: when the ODCPE was opened the first time, it may be necessary to configure its respective audio schema. The following message will be

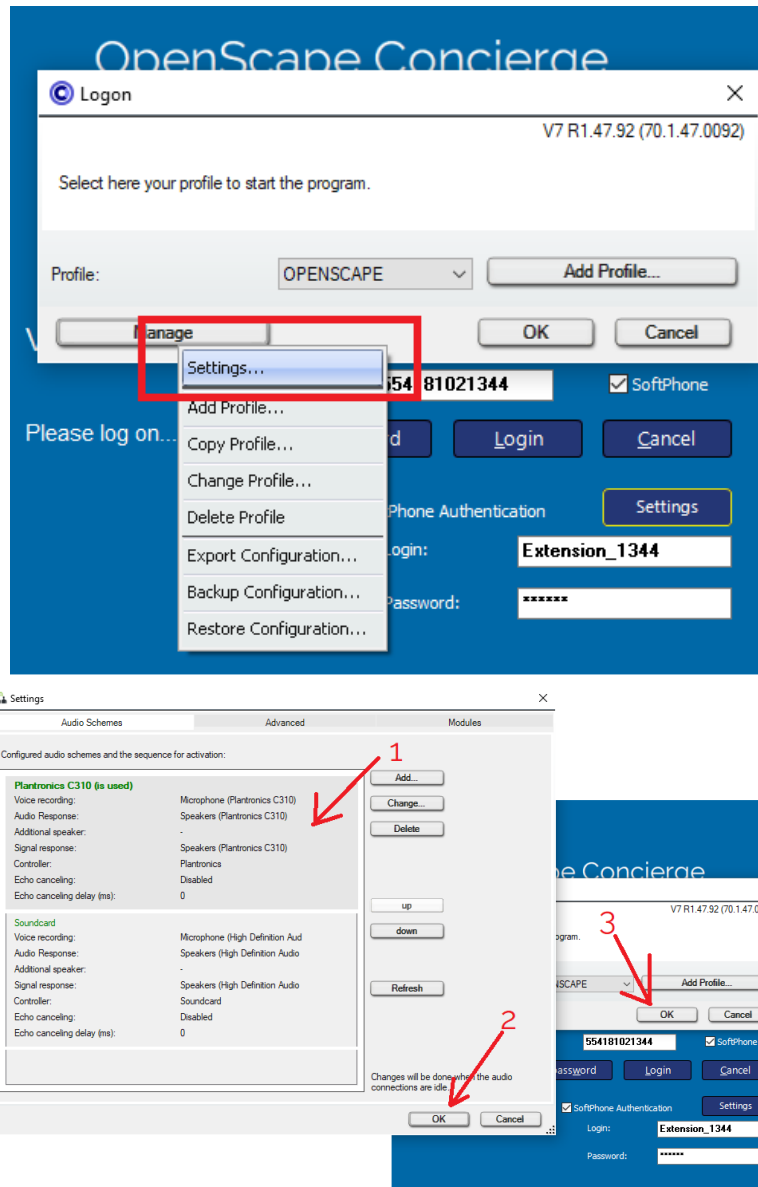
displayed for the user:



Therefore, the user needs to click on the “OK” button and press the “Settings” button below to open the ODCPE configuration:



After the ODCPE Logon window has opened, click on the “Manage” button, then select the “Settings” option as displayed below:



Select the appropriate audio profile or create a new one.

After that, press the “OK” button located in the ODCPE “Settings” window and press on the “OK” button located in the ODCPE “Logon” window. In the sequence, the user can press the OpenScope Desktop Client “Login” button again.

NOTE: it is possible to open the ODCPE configuration using its respective icon located in the Windows Desktop area as below:

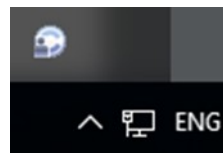


NOTE: to open the ODCPE settings interface, double click on the icon above while holding the shift key.

Or:

Under Windows Start menu select "Unify" then select the OpenScape Desktop Client Settings option.

If the ODCPE has been correctly configured according to the SIP customer environment, the following icon should appear in the Windows System Tray, indicating that the ODCPE is running and connected successfully.



HINT for the Administrators: if an error has occurred for any reason, the ODCPE icon in the System Tray will display a red "X" as shown below:



NOTE: to check what is happening it may be necessary to enable the Desktop Client traces. Traces are usually located in the folder <drive>:\Users\<username>\AppData\Local\Temp\2\unify\odcTraces, but are disabled by default. For more information on how to enable the traces, the administrator should consult the **Trace Info for OpenScapeDesktopClient** manual.

9. Soon after, the Concierge user interface will open. By default the attendant is automatically logged in (Agent State) to receive calls.

NOTE: the values for tenant, attendant, password and extension are preset the next time the application is opened and can be confirmed, or they can be changed, for instance, by another user if necessary.

By default the login values (language, tenant, user, password and extension) are stored in OSConcierge_LoginData.ini which can be found under <drive>:\Users\<username>\AppData\Roaming\Unify\OpenScape Concierge\OSConcierge.


HINT for Administrators: In cases when no login dialog is desired - proceed as follow: Add the parameter: NoAgentLoginForm=1 in OSConcierge_LoginData.ini under [Main] and after the encrypted login data. To switch the attendant automatically to “Available” state after login can be configured in Concierge Data Center.

2.4.3 Change the password

If you want to change your password please press the **Change Password** button in the Logon screen.

Now you can enter a new password by typing

- The old password
- A new password
- Confirming the new password



After entering the new credentials click the **Save** button. If you do not want to change your password click on **Cancel**.

If you entered your old password incorrectly then this message appears:




If your confirmed password does not match your new password you will get this message:



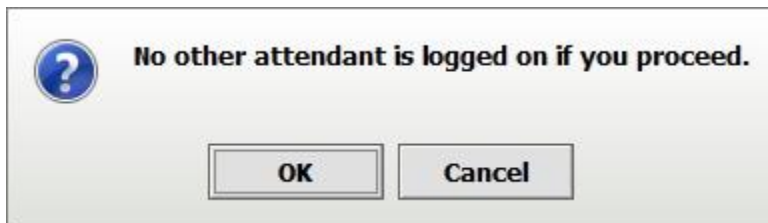
In both cases, please re-enter the passwords.

2.4.4 Close


Procedure

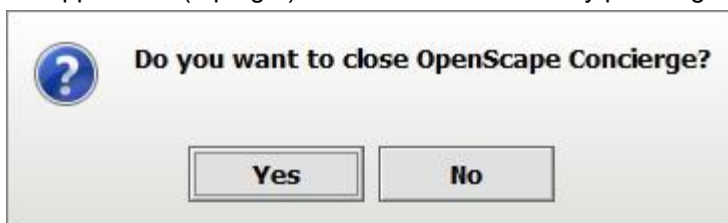
	<p>Before the application is stopped, the user has to log off from OpenScape Concierge with the Logoff button.</p> <p>Logoff is also performing an Logoff from OpenScape Contact Center)</p>
---	--

If this is the last logged on attendant, this is notified by the following advisory.



The user is logged off from OpenScape Concierge by pressing the **OK** button.

The program is exited by pressing the **Close** button  in the title bar of the application (top right). Confirm the selection by pressing **Yes**!



If the user does not log off before exiting the application by pressing the **Close** button in the title bar of the application, the following is prompted:




The user is logged off from OpenScape Concierge by pressing the **Yes** button to confirm. If the user is the last logged on agent, it is necessary to confirm this again for the application to close.

With **Ignore** the application can be closed without logging off from the OSCC.

NOTE:

OSV Installations: When closing the Application with **Ignore** the Agent will remain logged on in OSCC as well as in the Fall Back Hunt Group.

OS4K Installations without OSCC will have no Ignore Button

If you want to close the Concierge application during an active call by clicking on  in the title bar, an information draws your attention to the fact that this disconnects the active connection:

You can either cancel the process or confirm with **OK**.

2.4.5 Unify Phone as Attendant Extension

To use the Unify Phone as an attendant extension, the attendant must be logged in with the corresponding Unify Phone ONS extension (E.164 format), as illustrated below.

NOTE:

For further information refer to section 4.3.5 Unify Phone and OpenScape Concierge Integration in the OpenScape Concierge V5.0, Configuration Concierge, Administrator Documentation.

NOTE:

For more information about Unify Phone, please consult the Unify Phone V3 Administrator Documentation.

NOTE:

There is no presence status synchronization between Unify Phone and OpenScape Concierge — the Concierge Client does not display the Unify Phone presence status and does not change it.

NOTE:

The Unify Phone hold feature does not have the same concierge hold feature functionality. It will not send the partner to the concierge music on hold.

NOTE:

The Unify Phone transfer feature does not have the same concierge transfer feature functionality. It will not send the partner to the concierge music on hold until the destination extension is free.

NOTE:

When using Unify Phone as attendant extension do not use the same ONS extension registered in any device like the Concierge Embedded softphone, affecting the correct functionality.

NOTE:

The “Concierge Unify Phone Integration” is supported only when Concierge is connected to the OpenScape Voice (OSV) communication platform.

NOTE:

The “Concierge Unify Phone Integration” is not supported when Concierge is connected to OpenScape Contact Center (OSCC).

3 Incoming calls

In an attendant environment all incoming calls have several kinds of requests. The first difference is between attendant and personal calls.

- **Attendant calls** are calls coming through service numbers or internal switchboard numbers in most cases to be transferred to a contact or to get information.
- **Personal calls** are calls directly dialing the attendant's phone number (extension).

3.1 Accept an attendant call

By default only logged on and **Available** attendants automatically receive calls. In all other user states the call is placed in the caller queue, see section 3.3 Caller queue.

1. When an incoming attendant call is received by Concierge and the attendant is available, it is indicated by:
 - a blinking handset and
 - next to it a Welcome Display which provides assistance to welcome the caller as it normally displays the words you use to greet the caller.

For example:

The screenshot shows the 'Caller queue' window. At the top, it says 'Switchboard AAA' and 'Welcome to TestCo, my name is ...'. To the right is a handset icon with a green light. Below this is a table with call details:

Call type, called number		Caller	
Type	Service call	Number	+49 (69) 79309-1750
For	+49 (89) 789-368	Name	Mrs. Wang, Susi (+)
Name	Switchboard AAA	Company	TestCO
		Location	Frankfurt
Comment			

Below the table is a 'Call functions' bar with buttons: Alt+F2 Park, F2 Transfer, F4 Hold, F5 Line 1 (highlighted with a green light), Alt+F7 Alternate, Alt+F5 Conference, F7 Disconnect, and Alt+F11 Queuing.

The heading ("Switchboard AAA" in this example) corresponds to the name of the called service number.

HINT for Administrators:

In Concierge Data Center you can:

- Define the texts and assign the text to service numbers under Basic data / Welcome messages
- Activate and de-activate the window, configure font size and position of the window under System data / Client configuration / Basic Configuration/ Show greeting window

For details see OpenScape Concierge, Administrator Documentation

2. The areas **Call type**, **called number** and **Caller** gives you information on this incoming call. See section 4.1.1 Call type, called number for detailed description.
3. Optionally configured Custom Data fields will give additional information about the caller (from telephone book or based on Call Attached Data from OpenScape Contact Center).
4. To accept the call you can either use the ENTER key of your keyboard or click on the blinking **Line 1** button:

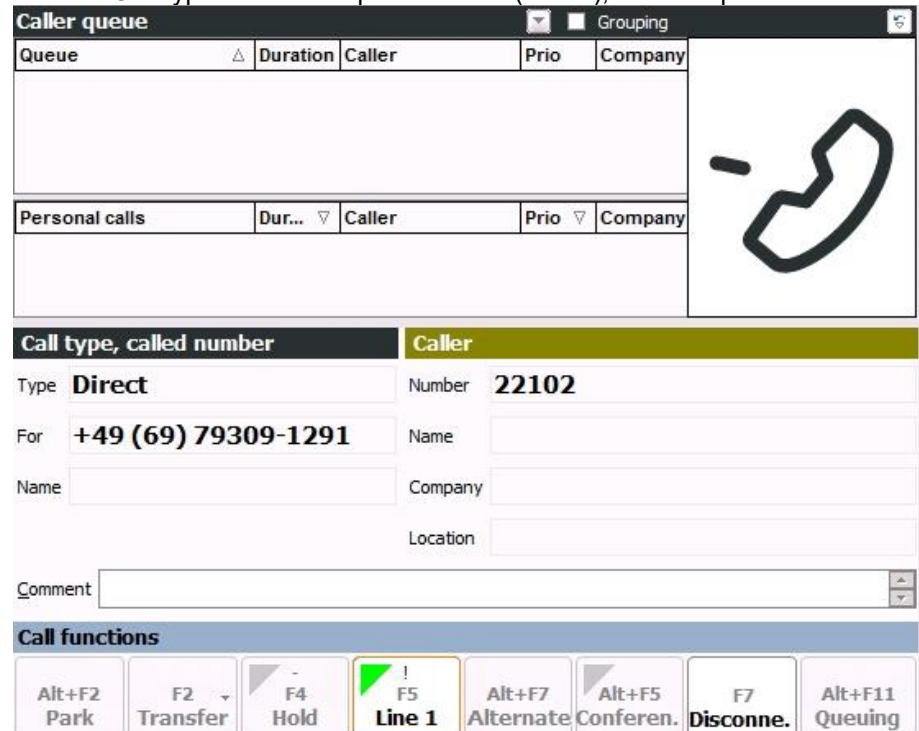


5. Now you are connected to the caller.
6. For further call handling continue with section 4 Call handling

3.2 Accept a personal call

The acceptance of a personal call is similar to the acceptance of a switchboard call. The only differences are:

- No Welcome window
- The Call type indicates a personal call (Direct), for example:



The screenshot displays the OpenScape Concierge interface. At the top, there's a 'Caller queue' window with columns for Queue, Duration, Caller, Prio, and Company. Below it, a 'Personal calls' section shows a list of calls. To the right, there's a large icon of a telephone handset. Below the queue, there's a 'Call type, called number' section with fields for Type (Direct), Number (22102), For (+49 (69) 79309-1291), Name, Company, Location, and Comment. At the bottom, there's a 'Call functions' bar with buttons for Park, Transfer, Hold, Line 1 (highlighted with a green triangle and exclamation mark), Alternate, Conferen., Disconne., and Queuing.

3.3 Caller queue

In case no agent is available to accept switchboard calls all incoming calls are placed into the **Caller Queue**. Personal calls will also be queued if you are not available. The Caller queue informs you in real-time about waiting calls. It provides for example details about the caller (if available) and the time the caller has been waiting in the queue. Depending on the waiting time the background color will change.

Hint:

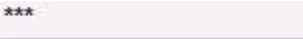
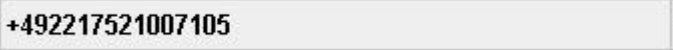


Background colors are configurable in Concierge Data Center under System data / Client configuration / Layout

For details see OpenScape Concierge, Administrator Documentation

Caller queue						
Grouping						
Queue	Durati...	Caller	Company	Prio	Reserved by	Reserve
Switchboard BBB (+49 (89...	01:47	?;TestCo (+49 (69) ...	Unify	1		🔄
Switchboard AAA (+49 (89...	01:07	(+) Mrs. Wang, Sus...	Unify	1		🔄
Personal calls						
	Durati...	Caller	Prio	Company	Reserved by	Retrieve
Call for me (+49 (89) 789.4...	01:54	?;TestCo (+49 (69) ...	0	Private		🔄

If not grouped, each call is displayed in a separate line and special coloring per queue is possible. The following information is displayed:

Table: Caller queue

Heading	Description
Queue	Name of queue and dialed phone number (DNIS).
Personal calls	“Call for me” and dialed phone number (DNIS)
Duration	Time in minutes:seconds the caller has been waiting.
Caller	<p>Depending on the information coming with the call the column displays:</p> <p>No ANI: </p> <p>Hint: Depending on the Switch / Carrier environment / configuration the displayed information like “***” can differ.</p> <p>ANI is sent, but no information about the caller in the database:</p>  <p>ANI is sent, the company's phone no. is stored in the database, but not the extension:</p>  <p>ANI is sent, name and phone no. is stored in the database:</p>  <hr/> <p>Hint for administrators: In Data Center the (&) can be changed into (;) if necessary.</p>
Reserved by	Name of the user who has reserved the call by clicking on Retrieve .
Prio	<p>The priority depends on the installation:</p> <ul style="list-style-type: none"> <u>With</u> OSCC: The field shows the priority that was configured in OSCC. <u>Without</u> OSCC: The field shows the priority configured in the Data Center / DDI Lookup table for the corresponding service number.
Company	Name of the company of the queue (dialed phone number) or for personal calls “Private” is displayed.
Retrieve	Use this button to <i>retrieve</i> a call from the queue. (Installations <u>without</u> OSCC)
Reserve	Use this button to reserve a call from the queue (Installation <u>with</u> OSCC)

The Caller queue also differentiates between attendant calls and personal calls (see section 3 Incoming calls).

Therefore the Caller queue is divided into two queues:

- **Queue** = attendant calls – see section 3.3.1 Queue - attendant calls

A31003S2250U101077619

- **Personal calls** = private calls - see section 3.3.2 Personal call queue

HINT for Administrators:

- Configuration of **Caller queue** in Concierge Data Center under System data / DDI Lookup and System Data / Client configuration / Basic Configuration.
- Configuration of **Personal queue** in Concierge DataCenter under User administration / Accounts and System data / Client configuration / Basic configuration.

For details see OpenScape Concierge, Administrator Documentation

3.3.1 Queue - attendant calls

Please read general information on Caller queue (section 3.3 Caller queue) first.

All logged on attendants responsible for the same queue(s) can see all calls waiting in queue.

Functions

The caller queue contains the following functions:

- Display of inbound calls
- A configurable color code visualizes the caller's wait time. This is possible for each service number (configured in Data Center).
If individual color is configured, the waiting time color is only displayed in the background of the duration.

HINT for Administrators:

Via the Concierge Data Center you can define the associated threshold values under System data / Client configuration / Basic Configuration / Thresholds

For details see OpenScape Concierge, Administrator Documentation

- Grouping of calls for different queues
- Grouping and sorting by information fields, see section 3.3.1.1 Grouping and sorting
- Reservation or picking of calls, see section 3.3.1.5 Reserve calls in the Caller queue

3.3.1.1 Grouping and sorting

Calls in the caller queue can be viewed grouped and sorted.

NOTE:

Grouping and sorting does not have any influence on call distribution, it is just a grouped view of the waiting calls.

Sorting

Per default the sorting criteria are the columns **Prio** and **Duration**, but sorting can be changed if wanted. You can also combine multiple sorting criteria.

1. Click on the column you want to sort by (to enable "multiple sorting criteria", press shift key while clicking on the columns).
2. An arrow appears in the field for sort direction up or down – click on the field again to change the sort direction

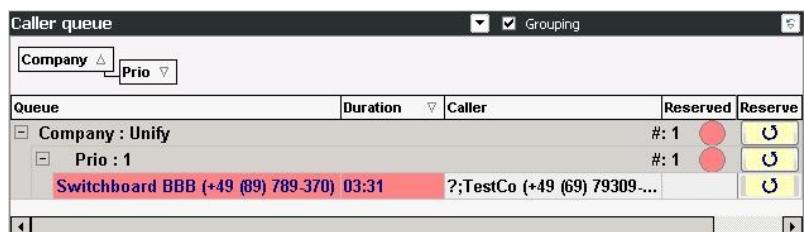


Click on  in case you want to restore the default columns to Prio and Duration.

Grouping

1. In the **Caller queue** window enable the **Grouping** check box.
2. Drag the column heading of the column to be sorted/grouped by on top of the Queue table (see figure). Multiple columns can be grouped and sorted.

Example: The Caller queue – grouping graphic shows grouping by company AND priority.



3. Click on "+" or "-" to show and hide grouped lines.
4. Drag the column headings back into the table in order to cancel grouping.

3.3.1.2 Grouping of calls for different queues

Attendant calls in the caller queue can be grouped for different queues. The following features are provided:

- The number of waiting calls for every group is displayed
- Color coding of waiting calls, dependent on the waiting time (configurable in Concierge Data Center)
- Grouping can be configured individually by the user and will be saved for the next start of Concierge
- Grouping can be switched off visually
- For every group a button for reserving the longest waiting call is provided

1. In the **Caller queue** window enable the **Grouping** check box.

Caller queue				
<div> <div> <div></div> <div>Grouping</div> </div> </div>				
Queue	Duration	Caller	Company	Reserve

2. Select “Set grouping to queues” in the drop down menu to the left of the **Grouping** check box.

Caller queue				
<div> <div> <div></div> <div>Grouping</div> </div> <div> <div>Drag a column heading here to group by that column.</div> <div> <div>Folded</div> <div>Expanded</div> <div>Reset grouping</div> <div>Set grouping to queues</div> </div> </div> </div>				
Queue	Duration	Caller	Company	Reserve
Switchboard AAA (+49 (89) 789-368)	01:01	(+) Mrs. Wang, Susi ;Tes...	Unify	⌂
Switchboard BBB (+49 (89) 789-370)	00:57	?;TestCo (+49 (69) 79309-...	Unify	⌂

Now the calls are grouped per queue:

Caller queue				
<div> <div> <div></div> <div>Grouping</div> </div> </div>				
<div> <div>Queue</div> </div>				
Duration	Caller	Company	Prio	Reserved by
+ Queue : Switchboard AAA (+49 (89) 789-368)				#: 1
+ Queue : Switchboard BBB (+49 (89) 789-370)				#: 1

You can expand the queues by selecting “Expanded” in the drop down menu:

Caller queue				
<div> <div> <div></div> <div>Grouping</div> </div> </div>				
<div> <div>Queue</div> </div>				
Duration	Caller	Company	Prio	Reserved by
- Queue : Switchboard AAA (+49 (89) 789-368)				#: 1
03:42	(+) Mrs. Wang, Susi ;Tes...	Unify	1	
- Queue : Switchboard BBB (+49 (89) 789-370)				#: 1
01:38	?;TestCo (+49 (69) 79309-...	Unify	1	

If you do not want to see any single call within a group you can select “Folded” to view only the queues.

In order to save space you can uncheck the **Grouping** box to hide the column heading **Queue**.

If you want to use any of the options of the drop down menu again you have to check the **Grouping** box first.

In the Caller queue you still have the choice of **grouping** and **sorting** the entries as explained in section 3.3.1.1. This is independent of active or inactive grouping of queues. For example:

Caller queue				
<div> <div> <div></div> <div>Grouping</div> </div> </div>				
<div> <div> <div>Queue</div> <div>Company</div> </div> </div>				
Duration	Caller	Company	Prio	Reserved by
- Queue : Switchboard AAA (+49 (89) 789-368)				#: 1
- Company : Unify				#: 1
01:25	?;TestCo (+49 (69) 79309-...	Unify	1	

Hint:

Grouping by queue is de-activated by default in Concierge Data Center and can be switched on if required under System data / client configuration / caller queue.

For details see OpenScape Concierge, Administrator Documentation

3.3.1.3 Other Call waiting indicators

Switchboard overview

Another visual help to estimate the call waiting situation is the **Switchboard overview** panel which provides information on the current situation regarding:

- Calls waiting
- Calls handled today
- Logged on users
- Available users

Switchboard overview			
Calls waiting	1	Logged on users	1
Calls handled today	3	Available users	0

Users see information on waiting calls and on users that are assigned to their tenants. Also the **Switchboard overview** panel title changes color as soon as a call is waiting.

Call waiting indicator message

If the Concierge application is minimized or not focused at the moment (other applications are used), a message window at the bottom right edge of the screen indicates waiting calls.



3.3.1.4 Receiving calls from the Caller queue


There are two ways a call is put through to an attendant from the Caller queue:

1. The attendant becomes automatically **Available** after another call or switches manually to the Available state by clicking on



Now your phone rings, click on the **Line 1** button to accept the call. If the button is marked you can also press the ENTER key to get the call.



The attendant retrieves the call from the Caller queue by clicking on  the respective line in the Caller queue (picking or reserving).


You can press this button either for a single call or alternatively for a grouped queue (if **grouping to queues** is active). If you have selected a grouped queue then the longest waiting call of this queue will be picked respectively reserved.

NOTE with OSCC:

The call is reserved with highest priority from OSCC and will be received when the attendant becomes available.

Now, follow the procedure as described in section 3.1 Accept an attendant call



3.3.1.5 Reserve calls in the Caller queue

In case the attendant is not yet ready to take a new call, but sees a call in queue that the attendant wants/needs to handle it is possible to reserve the call in queue by clicking on  in the respective line in the Caller queue (reserving).

When the attendant becomes available, the call is routed next. If the attendant is still busy, the call is reserved and routed as soon as the previous call ends.

When an attendant reserved a call, the call is displayed in the Caller queue with a line through it until the call is accepted. The attendant's own reservations are displayed in bold text while the reservations of other attendants are displayed in normal text. Reservations of other attendants can be picked up.

Only possible without OSCC: The attendant's own reservations can be retracted by making the reservation again.

Caller queue						
<input type="checkbox"/> Grouping						
Queue	Durat...	Caller	Company	Prio	Reserved by	Reserve
Switchboard AAA (+49 (...)	09:29	(+) Mrs. Wang, S...	Unify	99	Bianchi, Fr...	
Switchboard BBB (+49 (...)	10:09	?;TestCo (+49 (69...	Unify	1		

3.3.2 Personal call queue

Please read general information on Caller queue (section 3.3 Caller queue) first.

Personal calls are calls coming in directly to the attendant's extension, if the attendant is not idle, the calls are waiting in personal call queue.

Functions

The caller queue contains the following functions:

- Display of inbound calls
- A configurable color code visualizes the caller's wait time.
- Sorting by information fields (no grouping)
- Grouping and sorting
- Reservation of calls, similar to section 3.3.1.5 Reserve calls in the Caller queue

Hint:

The height of the personal call queue window is now adjustable.

3.3.2.1 Receiving calls from the Personal queue

There are two ways a call is put through to an attendant from the Personal queue.

1. The attendant becomes automatically **Available** after another call or switches manually to the Available state by clicking on



If this button is marked (per default in orange) you can also press the ENTER key to switch to Available and get the call.

2. The attendant retrieves the call from the Caller queue by clicking on



in the respective line in the Caller queue (picking)

The first way is only possible assuming no switchboard call is queued (in case attendant calls have a higher priority the next switchboard call would be put through).

Now, follow the procedure as described in section 3.1 Accept an attendant call

Hint for Administrators:

Personal calls have normally lower priority than all other type of incoming calls. The priority of personal calls can be configured in Data Center under System data / Tenants

For details see OpenScape Concierge, Administrator Documentation

3.3.2.2 Automatic Availability for last agent

For environments with a single Concierge Attendant the Ring No Answer (RNA) Feature can be affected.

If this feature is activated (by the administrator) the attendant will automatically be switched back to availability state in case the RNA timer expires and a waiting call will automatically be offered again to the attendant.

Short Scenario:

1. A waiting call is offered to the attendant
2. The attendant doesn't accept the call
3. The RNA Timer expires, the routing state will be changed to Unavailable and the call goes back in Caller queue
4. After this event occurred the agent will be switched back to available state and the call is offered again

Hint for Administrators:

This feature can be (de)-activated in Concierge Data Center under System data / Client configuration / Advanced Settings

For details see [OpenScape Concierge, Administrator Documentation](#)

4 Call handling


As soon as an incoming call is ringing at the attendant console, the following areas of Concierge give information about the call:

- Call type, called number
- Caller
- Comment
- Data

4.1 Information on incoming call

4.1.1 Call type, called number

This panel shows the information available for the current call.



Call type, called number

Type	Service number called
For	+49 (89) 789-400
Name	Switchboard

Table: Call type, called number

Type	The type of call; the following call types exist: <ul style="list-style-type: none">• Unknown• Service number called• Direct• Intercept• Intercept busy• Intercept no answer• Park• Call pick-up• Transfer• Active participation – outbound• Extension• Attendant• Outbound call
For	Phone number dialed by caller (DNIS).
Name	Name assigned to the dialed phone number, e.g. the name entered in the DDI Lookup table in Concierge DataCenter.

4.1.2 Caller panel

The **Caller** panel displays the caller's phone number and in case the caller's number is known in the database, details like name, company, location and a picture of the caller can be displayed.

Caller	
Number	+49 (69) 79309-1750
Name	Mrs. Wang, Susi
Company	TestCO
Location	Frankfurt



Field	Meaning
Color of the title "Caller"	<p>The color of the title shows the status of the caller: ringing: olive talking: powder blue on hold: charcoal / black</p> <p>Also see to section 0 If you have concierge with OSCC, you can configure in Data Center to show the agent ID instead of the agent name in the processing queue respective column.</p> <p>To enable this option through the DataCenter UI, go to System Data (1) / Client Configuration (2) / Advanced Settings (3) and check the parameter value "Show Agent ID instead of name in Processing Queue" as displayed in (4).</p> <hr/> <p>NOTE: For this change take effect all clients should be reopened. Below we have a sample when the configuration is enabled.</p> <hr/> <p>Status of Concierge console.</p>
Number	Phone number of the caller if it has been transmitted.
Name	Name of the caller if stored in the OpenScape Concierge database.
Company	Name of the company of the caller if stored in the OpenScape Concierge database.
Location	Location of the caller if he/she or the main company number is stored in the Concierge database.

4.1.2.1 Display information (OSV only)

In case Concierge is connected to an OSV, it is possible to show OSV display information in the Caller panel.

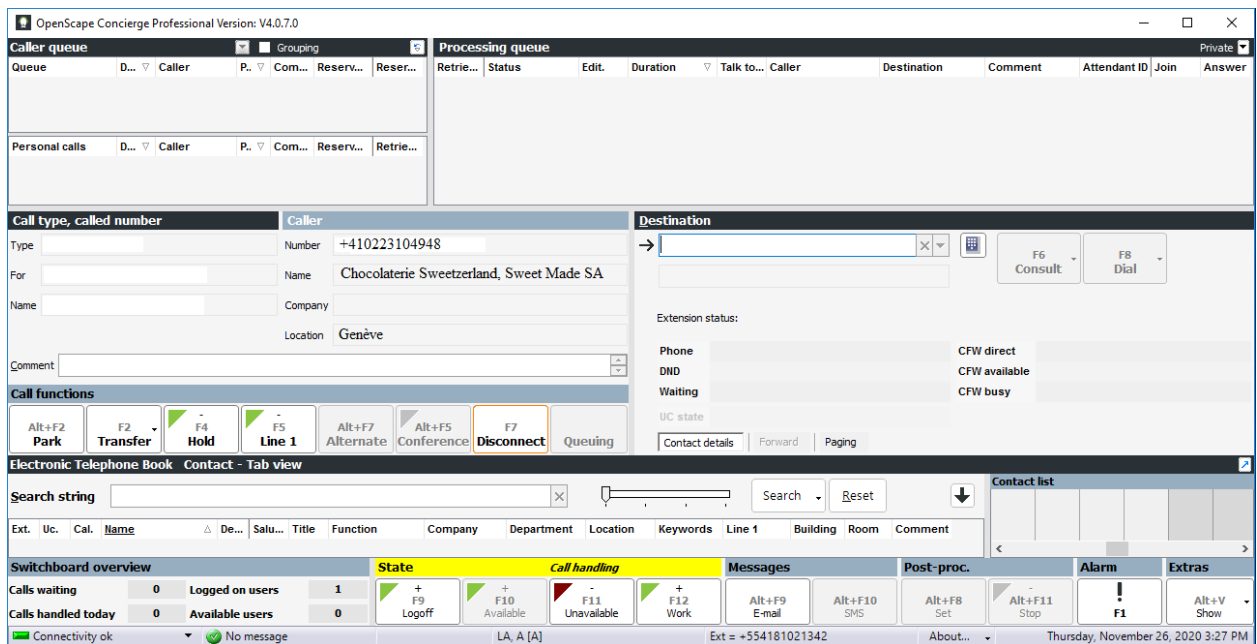
Hint for Administrators:

This feature can be (de)-activated in Concierge Data Center under System data / Client configuration / Telephone Number Formatting with the parameter: *Format of OSV Display Info on incoming call*.

For details see OpenScope Concierge, Administrator Documentation

4.1.2.2 REST API or LDAP Realtime

In case Concierge license has the REST API or LDAP Realtime available and it is enabled for a Tenant, every time when the concierge Tenant receives an external call, the caller phone number is queried in the phonebook service and the returned data (Name and Location) is displayed in the Concierge Client caller panel as below:



NOTE:

If the connection with the phonebook service is either down or not accessible or even the caller phone number was not found, the concierge will leave the Name and City fields empty (blank) on the Caller panel. In these cases, no secondary queries will be executed in the concierge local phonebook. No data from the phonebook service is stored locally.

NOTE:

For more details about how to configure this feature see section 6.4.6.4 REST API Settings in OpenScope Concierge V5R0 Professional Guide.

NOTE:

For more details about how to configure this feature see section 6.4.6.5 LDAP Realtime Settings in OpenScape Concierge V5R0 Professional Guide.

NOTE:

When the Concierge client connects to an OpenScape 4000 switch environment configured as VNR, it is essential for the contacts (whether internal or external) in the customer's corporate LDAP database to have their phone numbers formatted in E.164. Below is an LDAP sample:

The screenshot shows the 'agent1 Properties' dialog box with the 'General' tab selected. The 'Telephone number' field contains the value '55414052100005' and is highlighted with a red box. A red arrow points to this field. Other fields include 'First name' (UC User 01), 'Initials' (ENV11), 'Last name' (senhora.env11.user01@system), 'Display name' (UC User 01 CIELO ENV11), 'Description' (OSCC Agent = agent1 (ENV11) and UC = senhora.e), 'Office' (empty), 'E-mail' (empty), and 'Web page' (empty). The 'OK' button is highlighted with a blue box.

4.1.3 Talk Timer

The call type panel can be enhanced with a Talk Timer. It starts automatically counting the time after a call is accepted.

If the Timer Threshold is reached the background color will change to the configured value.

Call type, called number	00:05	Call type, called number	00:28
Type	Service call	Type	Service call
For	+492217521008970	For	+492217521008970
Name	Switchboard AAA	Name	Switchboard AAA

Not included in the Talk Time calculation is:

- Time during a call is parked
- Time during a call is transferred

The talk timer will re-start after retrieving a call from the processing queue.

Hint for Administrators:

This feature can be (de)-activated in Concierge Data Center under System data / Client configuration / Advanced Settings with parameters: Show connection time, Connection time threshold and Connection time warning color.

For details see OpenScape Concierge, Administrator Documentation

4.1.4 Comment

The **Comment** field is used to temporarily add information to the current call. In case of a recall or a new call from this contact the information is displayed again.

Comment	Urgent matter!	
---------	-----------------------	--

This information is also available for other attendants.

Hint for Administrators:

By default, the comment is shown for the last 7 days. 14 days is the maximum.

Enabling this feature and defining the time period is configurable in the Concierge DataCenter under System Data / Client configuration / Local settings / No.of days backwards for last caller info.

Important: Expanding the time span creates time consuming database queries to identify caller data!

For details see OpenScape Concierge, Administrator Documentation

4.1.5 Custom Data Fields

Custom Data fields provide additional information to the caller. They will be filled with data if the caller was found in the Electronic Telephone Book or information is provided through Call Attached Data by OpenScape Contact Center.

Custom Data Fields can be displayed in following areas:

- Caller Area between Caller and Destination
- Electronic Telephone book
- Contact Data Window

Caller Area

Custom Data Fields can be positioned horizontally below the comment field or vertical beside the Caller information.

Horizontal View:

Call type, called nu...		Caller	
Type	Service call	Number	+49 (30) 345-329
For	+49 (89) 789-400	Name	Mr. Miller, Oscar
Name	Switchboard	Company	TestCo
		Location	Munich
Comment			
Info 1	Detail 1	Info 2	Detail 2
		Info 3	Detail 3



Vertical View:

Call type, called number		Caller		Data
Type	Service call	Number	+49 (30) 345-329	Info 1 Detail 1
For	+49 (89) 789-400	Name	Mr. Miller, Oscar	Info 2 Detail 2
Name	Switchboard	Company	TestCo	Info 3 Detail 3
		Location	Munich	
Comment				



Hint:

Vertical positioned data fields are the favored way if multiple fields have to be displayed.

Telephone book:

Electronic Telephone Book Contact - Tab view								
Search string *					Search		Reset	
Ext.	Last name, fir...	Details	Line 1	Insurance	Patient ID	Station	Admission Date	Location
?	Brown, James	...	+49 (221) 752100-7873	Privat	223344	Station 47b	02.10.2015	München
	Donald, Mike	...	+49 (221) 752100-7893	VIP	334455	Station 77c	11.09.2015	Glatthbrugg
	Lindberg, Charl...	...	+49 (221) 752100-7881	Regular	123456	Station 02b	22.09.2015	Frankfurt
?	Mc Donald, Ron...	...	+49 (221) 752100-7883	Privat	987654	Station 99a	11.08.2015	München
?	Miller, James	...	+49 (221) 752100-7871	Regular	112233	Station 11a	04.09.2015	Stuttgart
	Schmidt, Joe	...	+49 (221) 752100-7891	VIP	456711	Station 88a	02.09.2015	Zurich

Contact Data Window

Hint for Administrators:

Each record in the Electronic Telephone Book can be enhanced with up to 25 additional custom specific fields. These data fields can be labeled for every available product language in OpenScope Concierge Data Center under System data / Client configuration / CustomDataFields.

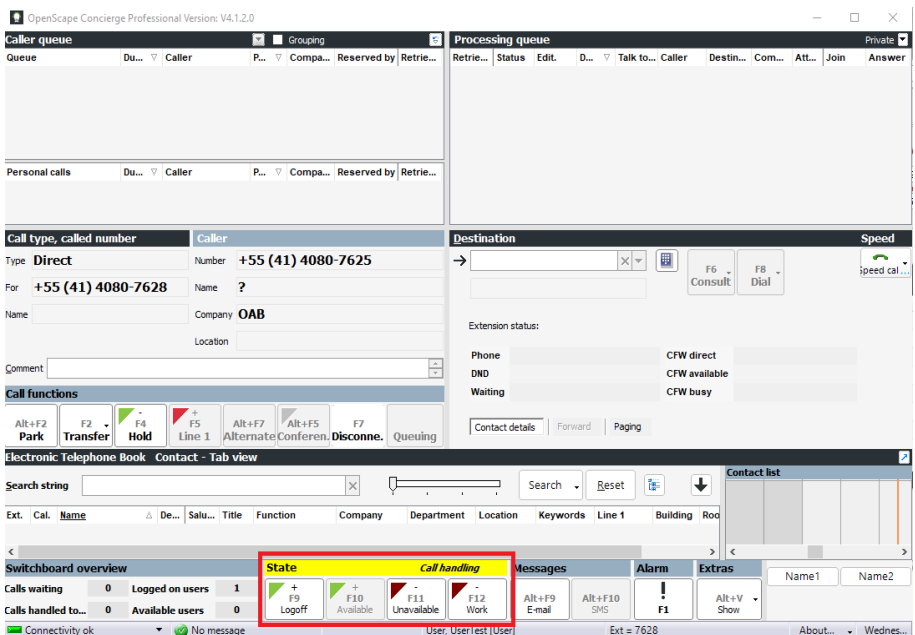
Data can be filled through Data Import or manually in Data Center / Contact Data.

Custom data fields can optionally be marked as searchable.

For details see OpenScope Concierge, Administrator Documentation

4.1.6 Changing Call Handling status bar color (With OSCC)

To change the Concierge "Call Handling" status bar color from yellow to another color when the concierge agent is receiving a routes call from OSCC it is necessary to open the Concierge Data Center and go to the following place: System Data (1) / Client configuration / Layout / Call status bar color.



For instance, you can set the blue color as below.



NOTE: for more details about how to proceed with this configuration in Concierge Data Center application, please consult the respective Concierge Administration Guide.

4.2 Destinations

The **Destination** panel is used for reaching a destination number. There are different ways of using it.

- Outbound calls
- Transfer calls
- Editing Direct Forwarding
- Paging
- Skill groups

NOTE:

The **Destination** panel can show a suggestion of the last successful connected destination from the database.

Destination state

The state of the phone number of the selected contact is displayed in the **Extension** panel.

The state display informs the attendant about the availability of the contact. In this way, calls can be answered efficiently, forwarded or parked, or a message can be sent.

NOTE: When Concierge is connected on a OSV environment and would like to start monitoring Unify Phone extensions it is necessary to enable the option called “**Private Data Presentation – V8**” through the OSV configuration interface.

For further information refer to section 4.3.5 Unify Phone and OpenScape Concierge Integration in the OpenScape Concierge V5.0, Configuration Concierge, Administrator Documentation.

The state of the destination phone is only displayed if the extension can be monitored, also the UC, Circuit, Skype or Microsoft Teams or Unify Office presence status can be seen if configured.

The information in Extension status also varies depending on the configuration of the destination telephones and whether ONS extensions within UC, Circuit, Skype or Microsoft Teams or Unify Office integration are configured or not.

If the destination is selected in the Telephone book, the state is queried for line 1 of the contact list.

If the state of a different connection (e.g. line 2, secretary) is to be displayed, select the connection. It is also possible to display the state of a phone number that is manually entered.









































































NOTE:






































If calls for an extension are forwarded, the state of the extension at which the call forward ends is displayed.




NOTE:

For ONS extensions within UC, Circuit, Skype or Microsoft Teams or Unify Office integration: Call forwarding of the phone is not displayed if an ONS number is detected. The state information for the One Number Service (ONS) is displayed instead.

Field	Description
-------	-------------

Field	Description																																																						
Status	<p><u>For installations with UC integration</u> The UC state set by the contact is displayed. The attendant cannot change the UC state. The following UC states are available:</p> <table> <tr> <th>Icon</th><th>State</th></tr> <tr> <td></td><td>Unknown</td></tr> <tr> <td></td><td>Offline</td></tr> <tr> <td></td><td>Busy</td></tr> <tr> <td></td><td>Away</td></tr> <tr> <td></td><td>Do not disturb</td></tr> <tr> <td></td><td>Available</td></tr> </table> <p><u>For installations with Circuit integration</u> The Circuit state set by the contact is displayed. The attendant cannot change the Circuit state. The following Circuit states are available:</p> <table> <tr> <th>Icon</th><th>State</th></tr> <tr> <td></td><td>Unknown</td></tr> <tr> <td></td><td>Offline</td></tr> <tr> <td></td><td>Circuit call</td></tr> <tr> <td></td><td>Away</td></tr> <tr> <td></td><td>Do not disturb</td></tr> <tr> <td></td><td>Online</td></tr> </table> <p><u>For installations with Skype integration</u> The Skype state set by the contact is displayed. The attendant cannot change the Skype state. The following Skype states are available</p> <table> <tr> <th>Icon</th><th>State</th></tr> <tr> <td></td><td>Offline</td></tr> <tr> <td></td><td>In a meeting</td></tr> <tr> <td></td><td>Busy</td></tr> <tr> <td></td><td>In a conference call</td></tr> <tr> <td></td><td>In a presentation</td></tr> <tr> <td></td><td>Be right back</td></tr> <tr> <td></td><td>Away</td></tr> <tr> <td></td><td>Do not disturb</td></tr> <tr> <td></td><td>Off work</td></tr> <tr> <td></td><td>Out of office</td></tr> <tr> <td></td><td>Out of office (Auto answ. no display with UC, Circuit, Skype or Microsoft Teams integrations)</td></tr> <tr> <td></td><td>Online</td></tr> </table>	Icon	State		Unknown		Offline		Busy		Away		Do not disturb		Available	Icon	State		Unknown		Offline		Circuit call		Away		Do not disturb		Online	Icon	State		Offline		In a meeting		Busy		In a conference call		In a presentation		Be right back		Away		Do not disturb		Off work		Out of office		Out of office (Auto answ. no display with UC, Circuit, Skype or Microsoft Teams integrations)		Online
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	Offline																																																						
	Circuit call																																																						
	Away																																																						
	Do not disturb																																																						
	Online																																																						
Icon	State																																																						
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	Do not disturb																																																						
	Off work																																																						
	Out of office																																																						
	Out of office (Auto answ. no display with UC, Circuit, Skype or Microsoft Teams integrations)																																																						
	Online																																																						

Field	Description														
	<u>For installations with Microsoft Teams integration</u>														
	<p>The Microsoft Teams presence state set by the contact is displayed.</p> <p>Note: The attendant cannot change the Microsoft Teams Presence state using the concierge client.</p> <p>The following Teams states are available:</p> <table><tr><th>Icon</th><th>State</th></tr><tr><td></td><td>Unknown</td></tr><tr><td></td><td>Offline</td></tr><tr><td></td><td>Busy</td></tr><tr><td></td><td>Away</td></tr><tr><td></td><td>Do not disturb</td></tr><tr><td></td><td>Online</td></tr></table>		Icon	State		Unknown		Offline		Busy		Away		Do not disturb	
Icon	State														
	Unknown														
	Offline														
	Busy														
	Away														
	Do not disturb														
	Online														
	<u>For installations with Unify Office integration</u>														
	<p>The Unify Office presence state set by the contact is displayed.</p> <p>Note: The attendant cannot change the Unify Office Presence state using the concierge client.</p> <p>The following Unify Office states are available:</p> <table><tr><th>Icon</th><th>State</th></tr><tr><td></td><td>Unknown</td></tr><tr><td></td><td>Offline</td></tr><tr><td></td><td>Busy</td></tr><tr><td></td><td>Do not disturb</td></tr><tr><td></td><td>Online</td></tr></table>		Icon	State		Unknown		Offline		Busy		Do not disturb		Online	
Icon	State														
	Unknown														
	Offline														
	Busy														
	Do not disturb														
	Online														
Phone	Value	Description													
		Idle: The phone is idle.													
		Unknown: The phone cannot be monitored.													
		Busy: The phone is busy.													
		Ringing: The phone is ringing (no display with UC, Circuit, Skype or Microsoft Teams or Unify Office integrations)													

Field	Description
	 Out of service: The phone is out of service.
	 Ringing and call pickup is possible (no display with UC, Circuit, Skype or Microsoft Teams integrations)
	 Phone forwarded (no display with UC, Circuit, Skype or Microsoft Teams or Unify Office integrations)
Dnd	The <i>Do not disturb</i> function is switched on.
Waiting	Number of calls already waiting for the contact.
CFW direct	Call forwarding as soon as a call comes in / no display with UC, Circuit, Skype or Microsoft Teams or Unify Office integrations
CFW available	Call forwarding after x rings / no display with UC, Circuit, Skype or Microsoft Teams or Unify Office integrations
CFW busy	Call forwarding when busy / no display with UC, Circuit, Skype or Microsoft Teams or Unify Office integrations

Hint for Administrators:

Many functions of the destination panel are configurable in the OpenScape Concierge DataCenter under Client configuration / Local settings.

For details see OpenScape Concierge, Administrator Documentation

4.2.1 Outbound calls

- For simple outbound calls enter the destination phone number manually into the phone number field. This can either be done with your keypad or via “drag and drop”, simply highlight a number within another program and then drag and drop it into the Destination field (the other program must support this feature, e.g. MS Outlook).



Hint for administrator:

Dialing with Drag and Drop is an optionally feature in Data Center / Client configuration.

For details see OpenScape Concierge, Administrator Documentation

OR

Use the Redial list as phone numbers that were dialed after starting the Concierge application can be selected in the **Redial** list by clicking on the drop down arrow:

Destination call no.	Destination name
+49 (69) 79309-...	Marquardt, Emma
+49 (69) 79309-...	Bianchi, Fred

OR

A phone number is automatically entered by a search result from the Electronic Telephone Book – see section 7 Electronic Telephone Book.

The state of the destination phone is displayed in case the extension can be monitored, also the UC, Circuit, Skype or Microsoft Teams or Unify Office presence status can be seen if configured. In case a photo of the contact person is stored in connection with the phone number, it is also displayed.

NOTE: When Concierge is connected on a OSV environment and would like to start monitoring Unify Phone extensions it is necessary to enable the option called “**Private Data Presentation – V8**” through the OSV configuration interface.

For further information refer to section 4.3.5 Unify Phone and OpenScape Concierge Integration in the OpenScape Concierge V5.0, Configuration Concierge, Administrator Documentation.

Extension status:

Phone	Available	CFW direct
DND		CFW available
Waiting	0	CFW busy
UC state	Busy	ONS

The information in Extension status varies depending on the configuration of the destination telephones and whether ONS extensions are configured within an UC, Circuit, Skype or Microsoft Teams or Unify Office connection or not. In this example an ONS is recognized, and the corresponding status is shown.

- To initiate the call press F8 or click on Dial button. If the button Dial is highlighted (per default framed in orange) you can alternatively press Enter on your keyboard to establish your outbound call.



Further options are available via the drop down menu.

Selection	Meaning
Dial	Dials the selected entry of the ETB or the entered destination number.
Dial / Dial with Intrusion override	Dials the selected entry of the ETB or the entered destination number even if the selected number is busy. In this case you will intrude into the existing call. Hint: Only available if the selected number is busy and the number can be monitored.
Option: Override DND and CFW	If the desired extension has CFW / DND activated the attendant can override this setting and a call gets through to this extension.

Hint for administrator:

Intrusion Override is a optionally feature in Data Center / Client configuration / Layout.

For details see OpenScope Concierge, Administrator Documentation

4.2.1.1 DTMF

In case digits have to be entered during a call, e.g. for a Voice Response menu the DTMF keypad can be used.

Press the DTMF button next to the destination telephone field.



NOTE: The button can only be activated during a call.

The required digits can be clicked or entered by numeric key pad.



In case the sequence of digits is stored on the clipboard, it can be entered from the clipboard. This is performed using the "Paste" button.

To close the keypad use the cross "x".

4.2.2 Transfer calls

1. To transfer an incoming call to a contact you can either enter the destination phone number manually into the phone number field:



A screenshot of a user interface element titled "Destination". It features a right-pointing arrow followed by a text input field. To the right of the input field are two small buttons: one with an 'X' and one with a downward-pointing arrow.

OR

Use the Redial list as phone numbers that were dialed after starting the Concierge application can be selected in the **Redial** list by clicking on the drop down arrow:



A screenshot of the "Destination" dropdown menu. The menu is open, showing a list of contacts. The list has two columns: "Destination call no." and "Destination name". The first two entries are visible: "+49 (69) 79309-..." and "Marquardt, Emma", followed by "+49 (69) 79309-..." and "Bianchi, Fred". The second entry is highlighted. The menu has a close button (X) in the top right corner.

Destination call no.	Destination name
+49 (69) 79309-...	Marquardt, Emma
+49 (69) 79309-...	Bianchi, Fred

OR

A phone number is automatically entered by a search result from the Electronic Telephone Book – see section 7 Electronic Telephone Book.

The state of the destination phone is displayed in case the extension can be monitored, also the UC, Circuit, Skype or Microsoft Teams or Unify Office presence status can be seen if configured.

The information in Extension status varies depending on the configuration of the destination telephones and whether UC, Circuit, Skype or Microsoft Teams or Unify Office is connected or not.

2. Two scenarios of transfers are possible:
 - Blind transfer
 - Consultative Transfer

Hint: You can also enter a "0" to transfer the caller to an external line (depending on the configuration it can also be a "9" for example, please ask your administrator). Then a Consult is not possible, only blind transfer.

4.2.2.1 Blind transfer

Click on the Transfer button:



The call is transferred directly to the destination number. A transfer to an external line is also possible. At the same time you can see the call in the Processing queue. It stays there until the contact has answered the call or you or another attendant retrieved the call back to the attendant console again.

These options are available via the drop down Menu.

Selection	Meaning
Transfer Call	Transfers the call directly to the selected entry of the ETB or the entered destination number.
Get an external line and transfer	Transfers the caller directly to an external line. Background information: For some phones in the own company it may not be allowed to get an external line. The participant then has the possibility to call the switchboard to get connected outside the company.
Option: Override DND and CFW	If the desired extension has CFW / DND activated the attendant can override this setting and a call gets through to this extension.

NOTE: The Transfer button can also be used to connect a caller to the requested contact person after consulting (see section 4.2.2.2)
For detailed description of the Processing queue see section 4.3
Processing queue

4.2.2.2 New Transfer Process

Right after a blind transfer the call appears in the Processing Queue. Every transfer request will lead to a transfer attempt.

- In case the destination extension accepts the call the call disappears from the Processing Queue.
- In case the call shows the status **Waiting** and the transfer is after retried transfer attempt still not possible – the attendant automatically receives the call as a recall after a configured time period.

Hint for Administrators:

The time setting can be configured in OpenScape Concierge Data Center/System Data/Processing queue.

For details see OpenScape Concierge, Administrator Documentation

- In case the call shows **another status** than Waiting (e.g. **Rejected** = the call was rejected by the destination extension) there will be no automated retry to transfer the call and the call does not come back to the attendant as a recall.

In this case an attendant action is required!

Detailed example scenarios:

a) Call transfer on busy

No function "on busy" is set – neither in the telephone system nor at the phone device.

1. A phone number is entered in the destination phone number field or pre-assigned via an ETB search.
2. If possible, the destination number is monitored (CSTA monitoring). If it is a monitorable device, Concierge already shows **Busy** when entering the phone number.
3. After pressing the **F2** (blind transfer) key, a first attempt is made, regardless of the phone state of the destination phone number.
4. The call becomes visible in the processing queue (status "**Waiting**").
5. After 10 seconds another attempt to transfer will be started automatically. The processing queue then briefly displays the status "**Being xferred**".
6. If the destination number can be monitored (CSTA Monitoring), a new transfer attempt is immediately initiated when the extension becomes free.
7. The transfer attempts are made as long as a "**Busy**" is reported back from the device.
 - *If the device is free on the next attempt, the call will be transferred.*

NOTE:

If a monitorable device becomes free before the 10 seconds have elapsed (for example, after 7 seconds), a further attempt to transfer is started directly.

- *If the participant rejects the call, the processing queue displays "**Rejected**" and the caller should be handled by the attendant again.*

b) Call transfer on busy – when **Second call allowed** is activated in system or phone device:

1. A phone number is entered in the destination phone number field or pre-assigned via an ETB search.
2. If possible, the destination number is monitored (CSTA monitoring). If it is a monitorable device, Concierge usually shows **Busy** when entering the phone number.
3. After pressing the **F2** (blind transfer) key, a first attempt is made.
4. The call becomes visible in the processing queue (status: "**Being xferred**") and waits there until the call is accepted on the second line.
5. If the subscriber accepts the call, it is delivered.
 - *If the participant rejects the call, no further automatic transfer attempt is started. The processing queue displays "**Rejected**" and the caller should be handled by the attendant again.*
 - *If the participant ignores the call, no further automatic transfer attempt is started. The processing queue displays "**Not answered**" and the caller should be handled by the attendant again.*

c) Call transfer, when Call Forwarding on busy is activated in system or phone device:

1. A phone number is entered in the destination phone number field or pre-assigned via an ETB search.
2. If possible, the destination number is monitored (CSTA monitoring). If it is a monitorable device, Concierge already shows **Busy** when entering the phone number.
3. After pressing the **F2** (blind transfer) key, a first attempt is made.
4. The call follows the respective call forwarding rule (forwarding to the answering machine, other phone number, mobile phone, etc.).

NOTE:

As the call is established by the CPS (external gateway) on behalf of the attendant's extension, the (forwarding) settings for external calls are valid.

5. During the transfer process, the processing queue displays the status "**Being xferred**" until the destination answers the call.
6. When the call is forwarded to another number:
 - *If the participant rejects the call, no further automatic transfer attempt is started. The processing queue displays "**Rejected**" and the caller should be handled by the attendant again.*
 - *If the participant ignores the call, no further automatic transfer attempt is started. The processing queue displays "**Not answered**" and the caller should be handled by the attendant again.*

4.2.2.3 Transfer an external line

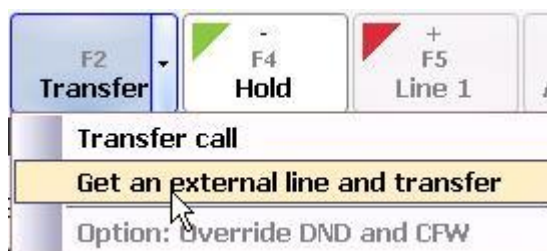
Phones with no access to an outside line can call directly the attendant console and get an outside line transferred.

Procedure:

The attendant takes the direct call and chooses from the Drop down Menu of the **Transfer** Button the selection "Get an external line and transfer".

This transaction will be immediately performed after clicking on the selection.

The same function can be achieved when entering the outbound access code in the destination field and initiate the transfer process with F2 key / Enter key.



The caller hears the dial tone and can start dialing.

Hint for Administrators:

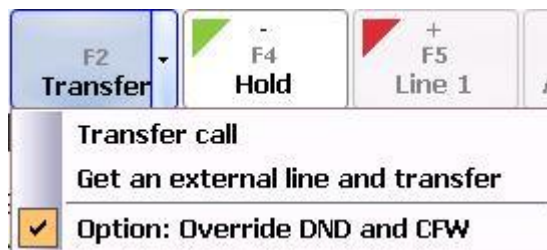
This feature has to be activated and configured country specific. (Dial- and Busy Tone) Additionally Transfer parameter like Caller Identification and billing information can be defined.

Settings are configured in OpenScape Concierge Data Center under System Data / Client configuration / Local settings.

For details see OpenScape Concierge, Administrator Documentation

4.2.2.4 Transfer with Override CFW and DND

If the desired Destination has an activated CFW or DND feature the attendant can override these settings by selecting the Option from the Drop down Menu of the **Transfer** Button.

**Procedure:**

1. After accepting the inbound call select the desired contact
2. In case of an activated CFW / DND feature select this option
3. Perform a Transfer call

Hint for Administrators:

This feature has to be activated and configured in Data Center / System Data / Client Configuration / Layout.

For details see OpenScape Concierge, Administrator documentation

4.2.2.5 Consultative Transfer

Before transferring the caller to the contact the attendant talks to the contact first or possibly try another contact, if this contact was not reachable or not the searched person:

1. Click on the **Consult** button in the **Destination** panel.



The caller is automatically put on hold while a consult call to the contact is being established.

2. When connected to the contact you have the possibility to either
 - Transfer the caller to the contact - see also section 4.3 Processing queue.
 - Alternate – toggle between caller and contact
 - Conference – talk to the contact and the caller in a three-party conference
 - Disconnect the contact as transfer would not be successful then you can either:
 - Retrieve the caller to talk to the caller again
 - Park the caller - see also section 4.3 Processing queue
 - Try another consult to another person

When not connected to the contact, you can disconnect the consult during ringing. The caller stays on hold.

Multiple scenarios are possible to handle the caller in case the consulted contact does not take the caller. Contact your supervisor for advised handling.

These further options are available via the Drop down menu:

Selection	Meaning
Consult	Consults the selected entry of the ETB or the entered destination number
Consult with Intrusion override	Consults the selected entry of the ETB or the entered destination number even if the selected number is busy. In this case you will intrude into the existing call. Use only in very urgent cases! Hint: Only available if the selected number is busy and the number can be monitored.
Option: Override DND and CFW	If the desired extension has CFW / DND activated the attendant can override this setting and a call gets through to this extension.

4.2.2.6 Editing Direct call forwarding

Direct call forwarding can be changed by the Concierge attendant. This is carried out by clicking on the "CFW direct" box and entering the phone number to which calls are to be forwarded.

After entering the new number click the check box to confirm forwarding.

To delete forwarding, click on x.

After entering a new forwarding or deleting forwarding, the states for the extension is reloaded automatically.

If call forward tracking has been switched on, the direct call forwarding can be tracked (default: 3 steps – max. 10 steps). The call forwarding destination at which the call forwarding ends is displayed. For this destination, the status of the extension is displayed.

4.2.3 Paging and joining calls

Overview

In case a participant cannot be reached by telephone at present, the attendant has two possibilities to reach the participant:

- Paging message only: It is possible for the attendant to simply leave a message for the participant to which the participant listens when he calls the announced telephone (park slot) number.
- Paging call: A person calling in can be parked in the Processing queue and the participant can be informed about the waiting customer and his request. When the participant gets this information, he can either get connected to the waiting customer or can get connected to an attendant and being joined to the waiting customer call by the attendant.

Paging describes the mechanisms which are supported by Concierge to find the participant, inform about the request and prepare connection to the customer.

Joining is the possibility to join an active call with a parked call.

When the information of the waiting customer reaches the participant, both can get connected without any other attendant interaction. This should be the optimal procedure.

In case the participant needs more information about the customer waiting or needs help to get connected to the call, he can call the attendant and the attendant joins both calls. Any active call can be joined to any parked call.

In case the request did not reach the participant or the participant is not able to talk to the customer, the attendant has to take care of the customer and should retrieve the call after an appropriate time and inform the customer.

For paging calls, the following information should be transferred to a participant:

- Parkslot number (telephone number the participant dials to get connected to the waiting customer) - via Loudspeaker announcement or Pager:
- Information about the waiting customer's request - via announcement played, when the participant calls the parkslot number:

Two typical scenarios of paging are supported by OpenScape Concierge:

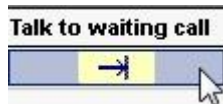
- Loudspeaker announcement - the searched person (participant) can be reached by a loudspeaker announcement (e.g. in a big store).
- Calling a pager - the searched person (participant) can be reached by a pager (e.g. a doctor in a hospital).

The necessary equipment to use paging mechanisms (loudspeaker or pager system) is not part of OpenScape Concierge.

Procedure

1. In both above mentioned cases, the customer who wants to talk to the participant will be parked in the Processing queue while the participant is being searched for. The park position is identified by a park slot number. This parkslot number must be transferred to the participant via loudspeaker (refer to section 4.2.3.3 Loudspeaker announcement) or via pager (refer to section 4.2.3.4 Pager call) because the park slot number is the telephone number the participant has to call in order to connect to the waiting customer.

NOTE: While the caller is waiting in the processing queue you can speak to the caller again by using the option “Talk to waiting call”:



2. The paging process will not be interrupted in this case, the park slot number remains valid.

If you want to talk to the caller again and interrupt the paging process use the Retrieve option.



Then you need to initiate the paging process again if wanted.

3. The participant can use any phone to call the parkslot number.
4. An announcement is played to the participant. This announcement is either a standard announcement (refer to section 4.2.3.1 Standard announcement) or an individually recorded announcement (refer to section 4.2.3.2 Record individual announcement). It should inform the participant about the waiting customer and the reason of the call. This announcement was selected or recorded by the attendant before parking the customer in the Processing queue.
5. An interactive dialog is played to the participant following the announcement. For example:
 - “To replay the message, dial 1,
 - to connect to the waiting caller, dial 2,
 - to consult the call attendant, dial 3,
 - to reject the call, hang up the phone.”

Hint for Administrators:

Pager Settings are configured in Concierge DataCenter under System data / Tenants. Individual Dialogs can be created and assigned.

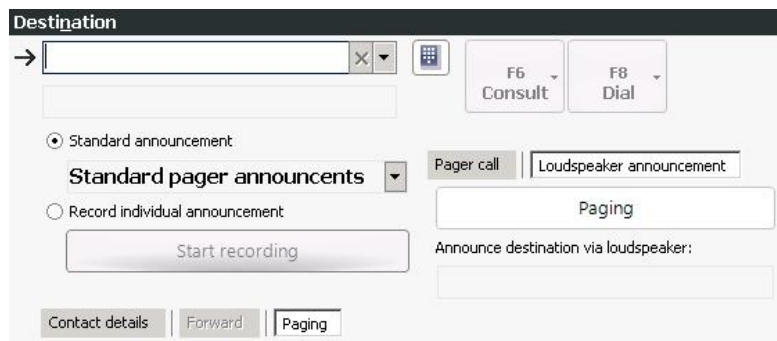
For details – see OpenScape Concierge, Administrator Documentation

Multiple scenarios result depending on the participant's decision and the behavior of the waiting customer and the attendant (refer to section 4.2.4 Processing queue paging scenarios).

4.2.3.1 Standard announcement

Concierge allows you to specify several **Standard announcements**. They are administered in OS Concierge DataCenter – refer to OpenScape Concierge, Administrator documentation.

Select the **Standard announcement** parameter and choose an announcement from the list. It is automatically stored in combination with the parkslot in the processing queue.



Some possible examples for standard announcements are:

- A patient wants to talk to the participant
- The husband/wife wants a callback
- Lunch is delivered
- A sales representative is waiting for the participant

4.2.3.2 Record individual announcement

Individual announcements are for example necessary to specify the customer's request more detailed, in order to enable the participant to decide, whether he will talk to the customer or not.


Individual announcements are recorded at the attendant's phone (or headset) and will be automatically stored in combination with the parkslot in the Processing queue.

Individual announcements can be created ad hoc using the following procedure:

Procedure

- Choose the **Record individual announcement** option.

- Press the **Start recording** button. The following window appears and recording starts immediately:

- Record your announcement
- Press Stop  when finished.
You can then replay or re-record your announcement by the function buttons:

In case you want to cancel recording, press the **Cancel recording** button:

- Click on the **Paging** button to start the paging.

NOTE:

During "Record individual announcement" no other Concierge functionality is available, until paging is activated or recording is canceled. If connectivity to Concierge Server is disconnected or the customer call is disconnected, the recording is automatically canceled.

4.2.3.3 Loudspeaker announcement

In general, there are two cases you would use a loudspeaker announcement:

- Paging call
The attendant receives a call from a person who wants to speak to a

participant at the location without direct access to a known phone or pager at present.

- **Paging message only**
The attendant wants to give private information (e.g. visitor waiting) to a participant at the location without direct access to a known phone or pager at present.

Procedure

1. Initiate a loudspeaker announcement via your Concierge attendant console by clicking on the **Paging** tab:



2. Decide whether you want to use a standard announcement or record an individual announcement.
 - In case you want to record an individual announcement, follow the procedure described in section 4.2.3.2.
3. In case you use a standard announcement, select the **Standard announcement** parameter and choose an announcement from the list. Then click on the **Paging** button (see also section 4.2.3.1)



After clicking on the **Paging** button, Concierge moves the announcement (standard or individual) if applicable together with the waiting call, into the Processing queue.

4. Announce the displayed telephone number (park slot no.) via loudspeaker.



Continue reading section 4.2.4 Processing queue paging scenarios

4.2.3.4 Pager call

In general, there are two cases you would use the **Pager call** function:

- **Paging call**
The attendant receives a call from a person who wants to speak to a participant at the location with pager.
- **Paging message only**
The attendant wants to give private information (e.g. visitor waiting) to a participant at the location with pager.

Procedure

1. Initiate a pager call by clicking the **Paging** tab in the Destination panel.



Enter the pager number into the corresponding field.

- Decide whether you want to use a standard announcement or record an individual announcement.
- In case you want to record an announcement, follow the procedure described in section 4.2.3.2 Record individual announcement.
- In case you use a standard announcement, select the **Standard announcement** parameter and choose an announcement from the list. Then click on the **Paging** button in the **Pager call** tab.

After clicking on the **Paging** button the participant will be notified by his pager including the parkslot number he needs to dial (variations are possible, depending on the configuration). Concierge moves your announcement (standard or individual) together with the waiting call into the Processing queue. Continue reading section 4.2.4 Processing queue paging scenarios.

4.2.4 Processing queue paging scenarios

For the example scenarios, it does not matter whether you use a standard announcement or record an individual announcement as well as there is no difference if you inform the participant via Loudspeaker announcement or via pager.

The differences depend on the type of paging (paging message only or paging call) and on the behavior of the paged person and the caller waiting.

4.2.4.1 Example: Paging without active call

A patient is waiting at the information desk and wants to talk to Dr. Willis. You can start a pager call without having an active call

You can inform Dr. Willis using loudspeaker or paging mode with standard or individual announcement.

Processing queue								Private ▼
Retrieve	Status	Edit.	D... ▼	Talk to ...	Caller	Destin..	Join	Answer
	Pager call	...	00:21		## Pager - message only #...			

Dr. Willis calls the park slot no., listens to your announcement and can decide either ("dialog short" administered in OS Concierge Data Center) to

- hang up = Processing queue line disappears or
- Speak to you (the attendant console) in order to get more information about the content of your announcement.

His call is shown in the **Answer** column in the processing queue grid.

Processing queue								Private ▼
Retrieve	Status	Edit.	D... ▼	Talk to ...	Caller	Destin..	Join	Answer
	Pager call	...	00:03		## Pager - message only #...			

You can pick the call from Dr. Willis by clicking on the answer symbol . The processing queue line disappears and you are connected to

Dr. Willis.

4.2.4.2 Example: Caller is waiting in the Processing queue for the paged person

A sales representative (Mrs. Wang) is calling the attendant console and wants to talk to Dr. Willis.

You can inform Dr. Willis using loudspeaker or paging mode with standard or individual announcement.

Retrie...	Status	Edit.	Du...	Talk to...	Caller
	P Pager call	...	00:07		Mrs. Wang, Susi (+) (+49 (69) 79309-1750)

→

F6 Consult

F8 Dial

☐ Standard announcement

☐ Record individual announcement

Pager Announcement Example

Start recording

Pager call

Loudspeaker announcement

Paging

Announce destination via loudspeaker:
+49 (89) 789-428

Contact details

Forward

Paging

The sales representative Mrs. Wang is waiting in the processing queue for Dr. Willis.

Dr. Willis calls the park slot no. +49(89)789 428, listens to your announcement and can then decide ("dialog complete" administered in OS Concierge Data Center) to:

- get connected to the caller => Dr. Willis and Mrs. Wang are connected on the Phone, the processing queue line disappears

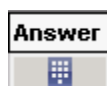
or

- speak to you (the attendant console) => see below scenario A "Paged person decides to speak to attendant"

or

- hang up => see below scenario B "Paged person decides to hang up"

It is indicated in the answer field with the icon below when Dr. Willis is connected to the park slot number and listens to the dialog.



Scenario A - Paged person decides to speak to you (attendant console)

Dr. Willis calls the park slot number and decides to talk to you (the attendant console), e.g. to inform you that he is busy and wants no disturbance for the next 2 hours. His call is ringing for you, shown in the **Answer** column in the processing queue grid.

Processing queue										Private ▼
Retri...	Status	Edit.	Duration	Talk to...	Caller	Destin...	C...	Attendan...	Join	Answer
	P Pager call	...	01:51		Mrs. Wang...	Mr. ...		089111		

You pick the call from Dr. Willis by clicking on the answer symbol . The button changes to this icon to indicate that you are connected to him and also the **Join** button appears. Press this button to transfer Dr. Willis to the Sales rep. (Mrs. Wang) if he agrees.

Processing queue										Private ▼
Retri...	Status	Edit.	Duration	Talk to...	Caller	Destin...	C...	Attendan...	Join	Answer
	P Pager call	...	00:28		Mrs. Wang...	Mr. ...		089111		

NOTE:

It is also possible to answer the call from Dr. Willis although you are in another call at the moment. The other call will be put on hold automatically when you click on the answer symbol . After you finished the call with Dr. Willis, you have to retrieve the held call manually.

Scenario B - Paged person decides to hang up

In case Dr. Willis decides to hang up during or after listening to the announcement, you are informed by an icon.

Processing queue										Private ▼
Retri...	Status	Edit.	Duration	Talk to...	Caller	Destin...	C...	Attendan...	Join	Answer
	P Pager call	...	00:32		Mrs. Wang...	Onei...		089111		

Important NOTE:

When this icon appears, the park slot no. is no longer valid. This means that Mr. Willis has no chance to listen to the announcement again. Retrieve the sales rep. (Mrs. Wang) from the processing queue, talk to her and decide about the situation.

Scenario C – Sales rep. (waiting call) disconnects the call

In case the Sales rep. decides to hang up, there are following possibilities:

- Sales rep. hangs up before Dr. Willis called the park slot number or before he made a decision after listening to the announcement
=> Dr. Willis will hear that the function is not available (dialog malfunction administered in OS Concierge Data Center) and the parked call disappears from the processing queue.
- Sales rep. hangs up before Dr. Willis has decided to talk to you (attendant console)
=> The parked call (Sales rep.) is disconnected, but the processing queue shows that the Sales rep. had hung up – see figure:

Processing queue										Private ▼
Retri...	Status	Edit.	Duration	Talk to...	Caller	Destin...	C...	Attendan...	Join	Answer
	Abandoned	...	00:42		## custom...			089111		

4.2.4.3 Processing queue paging details

A tool tip information is available for every processing queue line when moving the mouse pointer over the corresponding **Retrieve** icon.

NOTE:

With the tool tip information you can find the park slot number again in case you need it.



4.2.5 Skill groups

The **Skill groups** tab allows dialing or transferring a call to a user group. The tab only appears if Skill groups are configured.

Skill groups without OSCC

Skill groups are phone numbers with the associated names that can be stored in the **Concierge Data Center**. These can be hunt groups or contact phone numbers.

Destination

→ +498912345  

Ext. Service Provider

F6 Consult

F8 Dial

Skill group

Ext. Service Provider

Contact details

Forward

Skill groups



Paging

Skill groups with OSCC

Service numbers and the associated agents can be skill groups. Enter the Skillname, Dialnumber and CalltypeID parameters (unique number for the queue).

The advantage is the number of available agents within the skill groups can be displayed.

Destination

→ +492217521008980  

IT Support HL

F6 Consult

F8 Dial

Skill group

IT Support HL

Avail. users in the Contact Center

0

Contact details

Forward

Skill groups

Paging

Procedure

1. Click on the **Skills** tab
2. Select the Skill group you want to call or transfer the caller to.
3. Click on **Dial**.
The group is dialed, e.g. for consultation
4. Click on **Transfer**
The call is transferred to the group.

4.3 Processing queue

The Processing queue shows all waiting calls that were transferred and not answered, parked by a user or waiting for paging.

All logged on attendants responsible for the same queue(s) can see all calls waiting in the Processing queue – with one exception: a call with the status “Being xferred” only the attendant that has placed the call into the Processing queue can see it – in case the transfer fails the other attendants can then see the call under “public”.

Processing queue										Private ▼
Retrie...	Status	Edit.	Duration	Talk to...	Attenda...	Caller	Destination	△	Comment	Join
	Being...	...	00:12		22102	+4961844...	+4915110835...			

Each call is displayed in a separate line and a configurable color code visualizes the caller's wait time.

Processing queue										Private ▼
Retrie...	Status	Edit.	Duration	Talk to...	Attenda...	Caller	Desti...	△	Comment	Join
	Not answered	...	01:26		22102	+49 (151) ...	+49618...			

HINT for Administrators:

Configuration of Processing queue in OpenScope Concierge DataCenter under System data / Client configuration / Processing Queue.

For details see OpenScope Concierge, Administrator Documentation

Three different views can be selected:

- **Private**
Select the **Private** option via drop down menu at the top right to view calls that you placed in the queue.
- **Public**
Select the **Public** option button via drop down menu at the top right to view all calls of a tenant (not only your own).
- **Group**
Select the **Group** option button via drop down menu at the top right to view all calls of the group to which this attendant is assigned.
(Requires Group / Super group configuration)

HINT:

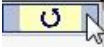
Calls in processing will become visible to others if the associated attendant logs off. This happens independently of the level set in order to have a fallback to handle the customer call even if the responsible attendant has left.

The following information is displayed:

Field	Meaning
Retrieve	Button to retrieve the call from the Processing queue in order to talk to the caller
Status	<ul style="list-style-type: none"> • Parked • Waiting • Being xferred • Busy • Not answered • Abandoned • Rejected • Pager call • Canceled
Edit	Destination can be edited – see section 4.3.2 Edit a Processing Queue call
Duration	Time in Minutes: Seconds that the caller has already waited in the processing queue.
Talk to waiting call	While a call is parked in the processing queue the attendant has the possibility to talk to the waiting caller again (e.g. for apologizing like “Sorry, it takes a bit longer”) without retrieving the call (the call remains in the processing queue). This has the advantage that in case of a paging process the call can still be joined with the desired person without paging this person again. “Talk to waiting call” is only possible if you do not have an active call and the state of the waiting call is not “in Transfer”
Caller	Name and phone number of the caller if stored in the OpenScape Concierge database.
Destination	Name and phone number of the call destination if stored in the OpenScape Concierge database
Comment	In case text was entered in the comment field before placing the caller into the Processing queue.
Attendant ID	Attendant Id of attendant that has placed the caller into the Processing queue
Join	<p>Is mainly used for paging - see section 4.2.3 Paging and joining calls.</p> <p>But also it can be used for an example scenario where a caller is waiting for a contact and the attendant has reached a colleague of the contact, who is willing to take the caller instead.</p>
Answer	For paging only. See section 4.2.3 Paging and joining calls

Tool tip

Detailed information on the call that was placed in the processing queue is displayed in the tool tip. The tool tip appears when you move the mouse pointer motionless over the **Retrieve** button of the corresponding line.

Processing queue						
Retrieve	Status	Edit.	Duration ▾	Talk to waiting call	Caller	Destination
	Attendant ID : 089111 Call for : +49 (89) 789-368 - Switchboard AAA Caller : Mrs. Wang, Susi (+) Caller no. : +49 (69) 79309-1750 Destination : Destination call no. : Waiting : False Parkslot number :					

4.3.1 Retrieve calls from the Processing queue





Click on **(Retrieve)** in the Processing queue.




Every Concierge user can retrieve a parked call from the Processing queue, regardless of whether you or another user of the same tenant placed the call into the queue.

The call is retrieved from the queue, which means:

- You can answer the call immediately.
- You can reserve the call; for example, by clicking on **Retrieve** while you are talking on the phone. Then the call is displayed with a line through it. When your current call ends, the new call is assigned to you.

Processing queue						
Retrieve	Status	Edit.	Duration ▾	Talk to waiting call	Caller	Destination
	 Parked		00:31		Mrs. Wang,...	Mr. Dr. On.

- You can also retrieve a call, which is currently in transfer to a ringing destination. If you choose to retrieve, the transfer is cancelled (maybe directly after you initiated the transfer, you realize that you need another information from the customer.) With retrieve, you can connect to the customer again if you do not have a current call, otherwise it is assigned to you after your current call ends.

Processing queue						
Retrieve	Status	Edit.	Duration ▾	Talk to waiting call	Caller	Destination
	 Canceled		00:14		Mrs. Wang,...	Mr. Dr. On.

- In case of a paged call (status “pager call”) you will also retrieve the call again but the paging process will be interrupted. In order not to interrupt the paging process and talk briefly to the caller please use the option “Talk to waiting call” (see also section 4.2.4).

4.3.2 Edit a Processing Queue call




As callers are physically staying in the Processing queue during transfer for example, it is possible to edit the destination in case the destination doesn't answer the call.

Process

Click on  in the Edit column.

The following panel opens:

Processing queue

Retrieve	Status	Edit.	D...	Talk to waiting call	Caller	Destin...	Com...	Att	Join
	 Being xfer...		00:41		Mrs. ...	Mr. D...		089	


Renewed transfer for the call:

Caller: +49 (69) 79309-1750 - Mrs. Wang, Susi (+)

Call destination: +49 (89) 789-368 - Switchboard AAA


Comment:

Destination

→ +49 (69) 79309-1721 

Mr. Dr. Oneill, Samuel (+)

Extension status:

Phone	 Ringing	CFW direct
DND		CFW available
Waiting	0	CFW busy

Contact details Forward

Ctrl+Alt+F4 New Transfer

Ctrl+Alt+F11 Transfer Cancel

This panel enables you to cancel an ongoing transfer.

For example, directly after you initiated the transfer, you realize that the entered destination number is wrong. You can cancel the transfer and initiate a new transfer to another destination - the customer continues to hear the music on hold and does not notice any of these operations.

To initiate a new transfer first cancel the transfer by clicking on

Ctrl+Alt+F11
**Transfer
Cancel**

Then enter a new destination number or select a new entry via the ETB and click on

Ctrl+Alt+F4
**New
Transfer**

You can also add or change the comment. The comment will be seen at once from all Concierge users with public view on processing queue.

Only one attendant can edit a call at the time. If a call is in edit mode, it is marked with an "X". If a call is in edit mode from another attendant, it is marked with a "X!". Other attendants will see edited calls as '---', these calls are blocked by the editing attendant.

Only one call can be edited by an attendant at the same time. If a call is in edit, and the attendant edits another call, the last editing is aborted.

All these actions for a call in the Processing queue can be handled even if the attendant is in another customer call.

Failed transfer

If a transfer failed several options can be configured in the processing queue what should happen with this call.

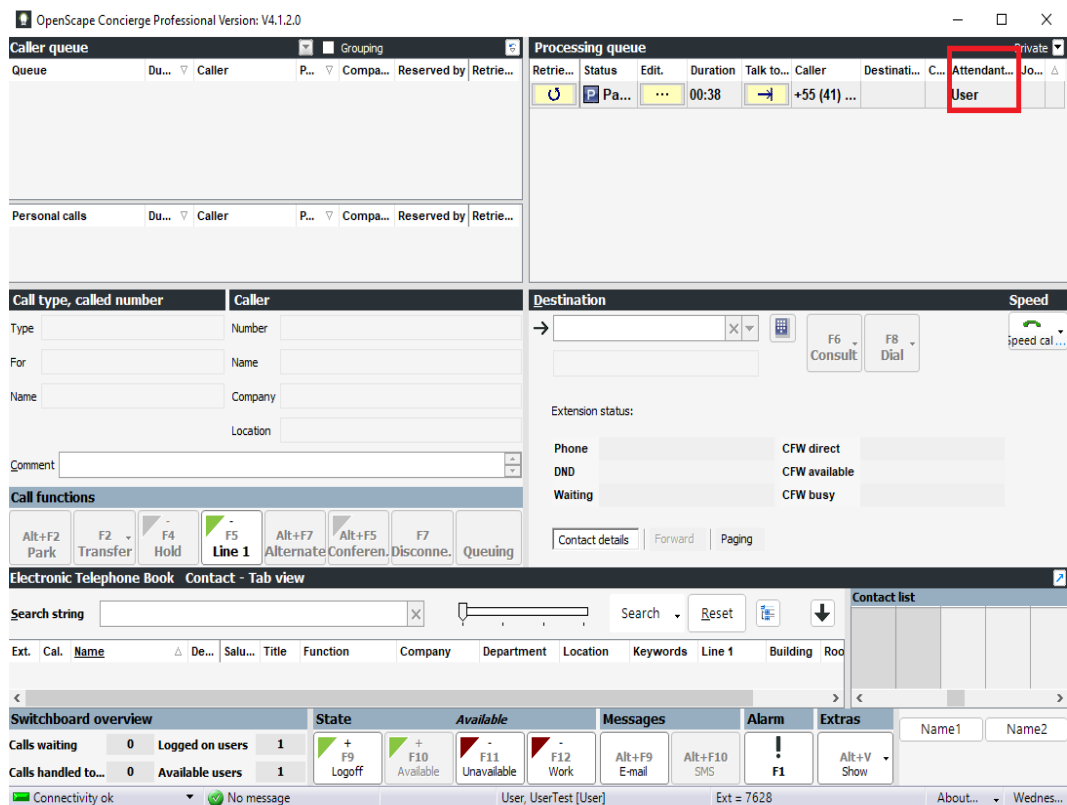
Possible configurations are recall to the attendant / show and present the call to other attendants in the same group / within the tenant.

Hint for administrators:

Configuration of the behavior can be set in Data Center / System data / Client configuration / Processing queue.

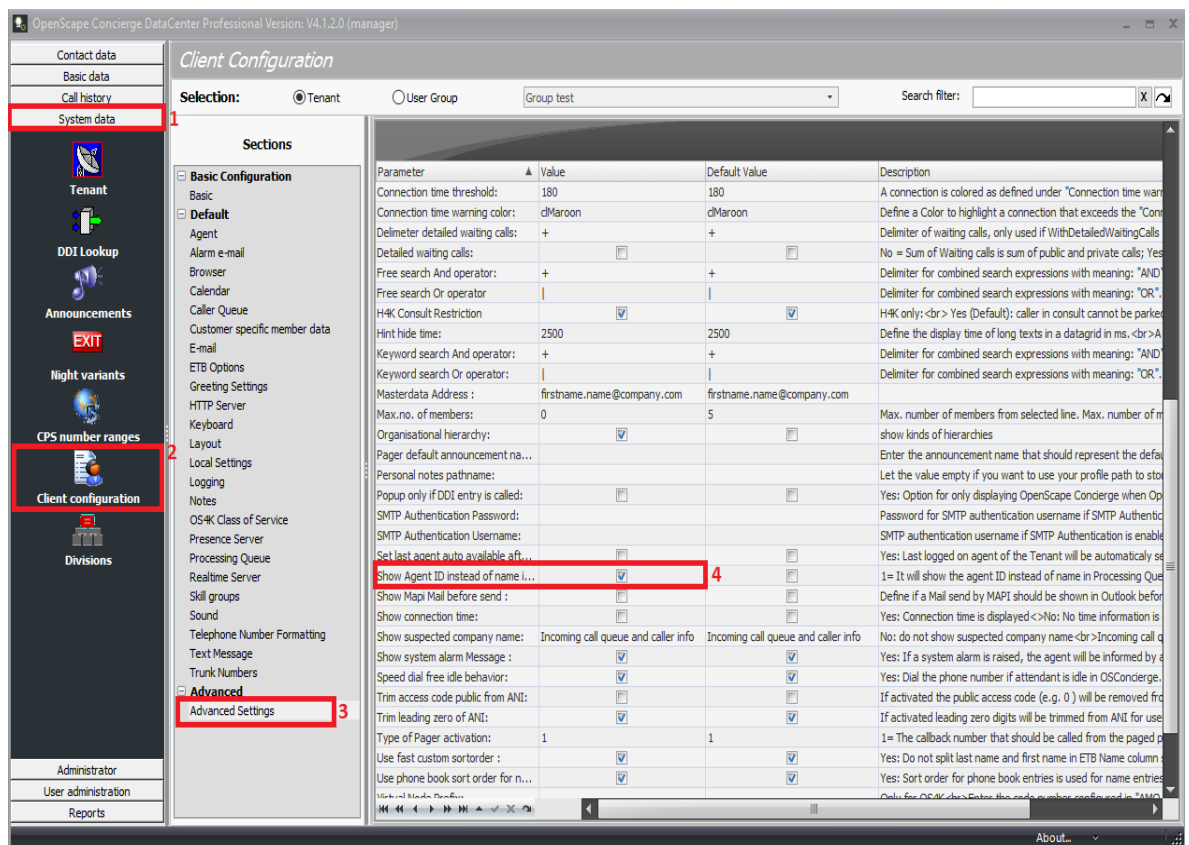
For details – see OpenScape Concierge, Administrator documentation

4.3.3 Setting Processing queue Attendant ID content



If you have concierge with OSCC, you can configure in Data Center to show the agent ID instead of the agent name in the processing queue respective column.

To enable this option through the DataCenter UI, go to System Data (1) / Client Configuration (2) / Advanced Settings (3) and check the parameter value “Show Agent ID instead of name in Processing Queue” as displayed in (4).



NOTE:

For this change take effect all clients should be reopened.
Below we have a sample when the configuration is enabled.

OpenScape Concierge Professional Version: V4.1.2.0

Caller queue

Queue	Du...	Caller	P...	Compa...	Reserved by	Retrie...

Personal calls

Du...	Caller	P...	Compa...	Reserved by	Retrie...

Processing queue

Retrie...	Status	Edit.	Duration	Talk to...	Caller	Destinati...	C...	Attendant...	Jo...
			00:38		+55 (41) ...			1000	

Call type, called number

Type

For

Name

Comment

Caller

Number

Name

Company

Location

Destination

Extension status:

Phone CFW direct

DND CFW available

Waiting CFW busy

Call functions

Electronic Telephone Book **Contact - Tab view**

Search string

Ext.	Cal.	Name	De...	Salu...	Title	Function	Company	Department	Location	Keywords	Line 1	Building	Room

Switchboard overview

Calls waiting: 0 Logged on users: 1

Calls handled to...: 0 Available users: 1

☒ Connectivity ok ☒ No message User, UserTest [User] Ext = 7628 About... Wednes...

Contact list

Name1	Name2

5 Status of Concierge console

The status of your console can be viewed by the headlines of the panels **Caller** and **Destination**. The colors stand for the status:

Black = no action or on hold

Khaki = ringing

Greyblue = connected

Examples:

- A call is in ringing state

Call type, called number		Caller		Destination	
Type	Service call	Number	+49 (69) 79309-22102	→ <input type="text"/>	
For	+49 (69) 79309-8990	Name	Mr. Bianchi, Fred		
Name	Switchboard	Company	TestCo	Extension status:	
		Location	Frankfurt	Phone	
Comment				DND	
				Waiting	
				Contact details Forward	
Call functions					
Alt+F2 Park	F2 Transfer	F4 Hold	F5 Line 1	Alt+F7 Alternat.	Alt+F5 Confere.
				F7 Disconne.	Alt+F11 Queuing

- The Concierge user is connected to the caller.

Call type, called number		Caller		Destination	
Type	Service call	Number	+49 (69) 79309-22102	→ <input type="text"/>	
For	+49 (69) 79309-8990	Name	Mr. Bianchi, Fred		
Name	Switchboard	Company	TestCo	Extension status:	
		Location	Frankfurt	Phone	
Comment				DND	
				Waiting	
				Contact details Forward	
Call functions					
Alt+F2 Park	F2 Transfer	F4 Hold	F5 Line 1	Alt+F7 Alternat.	Alt+F5 Confere.
				F7 Disconne.	Alt+F11 Queuing

- The caller has been put on hold while a consult call to a contact is being established. The phone of the contact is ringing.

Call type, called number		Caller - Call held		Destination	
Type	Service call	Number	+49 (69) 79309-22102	→ +49 (69) 79309-1750	
For	+49 (69) 79309-8990	Name	Mr. Bianchi, Fred	Marquardt, Emma	
Name	Switchboard	Company	TestCo	Extension status:	
		Location	Frankfurt	Phone ? Unknown	
Comment				DND	
				Waiting 0	
				Contact details Forward	
Call functions					
Alt+F2 Park	F2 Transfer	F4 Retrieve	F5 Line 1	Alt+F7 Alternat.	Alt+F5 Confere.
				F7 Disconne.	Alt+F11 Queuing

6 Key functions (ENTER, SPACE, Esc)

This section contains the main built-in functions of Enter, Space and Escape key. These functions depend on the focused fields or areas of Concierge.

6.1 ENTER key functions

Operation of OpenScape Concierge is simplified by the situation-based **ENTER** key function.

Depending on the program situation, pressing the **ENTER** key triggers a function that relates to the current situation.

A color marking of the respective button indicates which function is active when you press the Enter key. The color marking is orange by default and can be changed in the Concierge DataCenter.

Examples:

- If you are logged off as a user, you can log on by pressing the **ENTER** key.



- If you are not available as a user, you can set yourself to available by pressing the **ENTER** key.



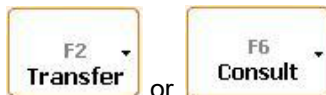
- Calls can be retrieved from the caller queue with **ENTER** (without automatic call delivery)



- Inbound calls can be accepted by pressing the **ENTER** key.



- If you are in talking state and a destination number is entered, you can press the **ENTER** key to initiate a Blind or consultative Transfer. (Transfer Type is configurable)



- If you are in talking state and no destination number is entered, you can press the **ENTER** key to disconnect the call



- If your phone is in idle state and the **Destination number** field is not empty, you can initiate an outbound call by pressing the **ENTER** key.



- You can start the ETB search by pressing the **ENTER** key.



- You can pick an “Doctor” Call by pressing the **ENTER** key.



- In Pick Mode an incoming call can be accepted by pressing the **ENTER** key.



Hint for Administrators:

The Enter function can be switched on / off in Concierge Data Center / System data / Client configuration / Local Settings.

For details – see OpenScape Concierge, Administrator documentation

6.2 SPACE key functions

- If a search string or a destination is entered, the x-button on the right of the edit field can be reached by tabulator and activated by space to delete the entry.
- If a destination list is filled, the drop down button can be reached by tabulator and activated by space to select an entry. The selected entry will be activated by the enter key.
- If caller grid is focused, with space button the focused call will be retrieved or reserved.
- If personal calls grid is focused, with space button the focused call will be retrieved or reserved.
- If processing queue is focused, with space button the focused call will be retrieved or reserved
- Edited if “edit-column” is focused
- Joined if “join-column” is focused
- If search grid is focused, with space button the focused member details form is shown
- If Wrap-up coding is visible, selection of reasons can be toggled with space key

6.3 ESCAPE (Esc) key functions

- If Electronic telephone book is maximized, escape key normalizes the view.
- If Member details form is shown, it is closed.

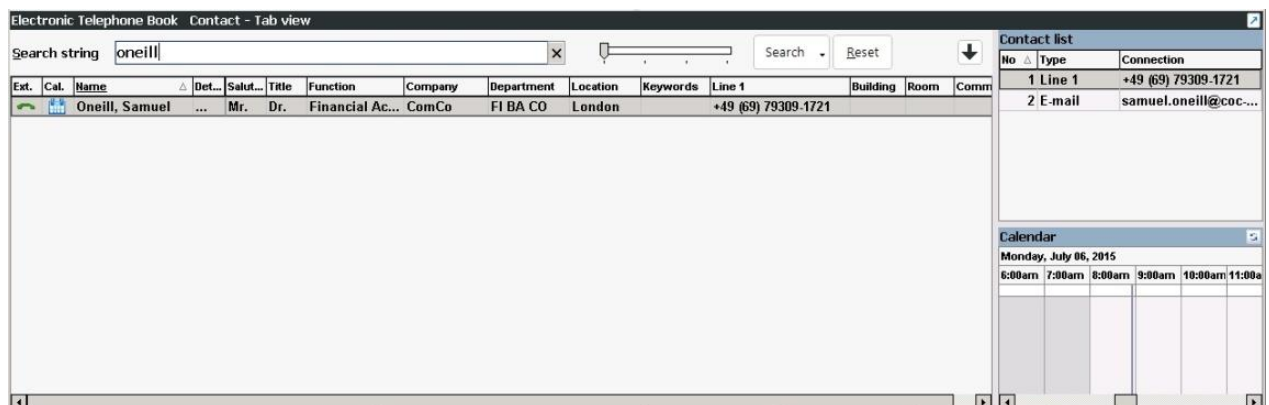
7 Electronic Telephone Book

A central panel in the main window is the Electronic Telephone Book (ETB). The ability to quickly find contact data in the database ensures that calls can be transferred efficiently.

To help you find a contact in the Electronic Telephone Book, a number of different search criteria are available:

- Free search capability without specifying a search target.
- Last name and first name
- Department and location
- Keyword
- Phone
- Fax
- Building and room
- Salutation and title
- Function
- Company
- Additional data fields
- Comment

Also functions like wildcards, fast and phonetic search lead to a successful search result.




7.1 Functions of the Electronic Telephone Book

- Wildcards
- Fast search
- Phonetic search
- Search String
- Advanced Search
- Contact – tab view
- Contact details
- Contact list

- Calendar view

See sections following for detailed descriptions about the functions.

7.1.1 Maximize/Minimize Contact list

	Use this button on the right hand side of the Contact -Tab View in order to maximize/minimize the Contact – Tab view including the Contact list and Calendar.
---	---

7.2 ETB search rules

7.2.1 Wildcards

Wildcard characters

The following wildcards (= placeholders) are available:

- ? : Place holder for one character
- * : Place holder for multiple characters

Examples

- In the **Name** field, enter the search term `Schulz`. You find all contacts with the last name of `Schulz` as well as contacts named `Schulze` or `Schulz-Wittgenstein`, but **no** contacts named `Müller-Schulz`.
- In the **Name** field, enter the search term `Schulz*`. This has the same effect as the first example.
- In the **Name** field, enter the search term `S?tt*` and enter the search term `ATD ????` in the **Department** entry field.
You find all contacts that meet the following criteria:
 - The last name begins with `S`, followed by exactly one letter, followed by two `t` and ending in any number of further letters.
 - The department of the contacts begins with `ATD` and a space followed by exactly four characters.

The following contacts could match this search request:

- > Ms Sattmann from the ATD ABCD department,
- > Mr Sutter from the ATD ITPS department,
- > Mr Sett from the ATD LSKA department.

The following contact does **not** match this search request: Ms Schattmeier from the ATD EMI department, because her last name contains three and not one letter between the "S" and the two "t", and because the end of the department name "EMI" consists of three and not four letters.

For any search in the fields with wildcards and place holders only ETB entries with filled fields are taken into consideration, entries with empty strings will not appear in the results' list. For example you search with `*` in the field "Title". Every entry who has got no tilde will not appear as a result.

7.2.2 Fast search

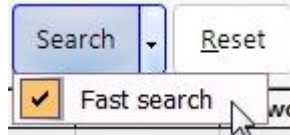
The fast search starts automatically after a delay time has elapsed while the user is still entering the search term in the search field.

The first *n* search results from the Electronic Telephone Book are displayed.

The fast search does not include a phonetic search.

Procedure

Enable the Fast search check box in the drop down menu of the **Search button** to switch on fast search. The Search button is always available, regardless of whether you have opened the advanced search or not (see also section 7.2.11).



Disable the check box **Fast search** to switch off fast search.

NOTE:

Effect on blind workstation

In the conventional search, the last search term is fully highlighted. This can be fully felt on a Braille terminal. This mechanism is only retained in the conventional search. In a fast search, this mechanism is not possible since a *slow* entry is immediately deleted after each search result.

7.2.3 Phonetic search

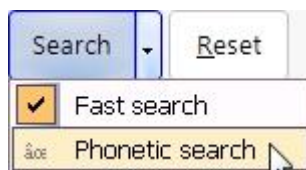
This function enables a phonetic search for the **First** and/or **Last Name** field. The phonetic search searches for names that sound similar to the entered search term.

It can be combined with the search in all available search fields.

The search time for a phonetic search exceeds the search time of a regular search. The number of hits is not 100% in every case.

Procedure

1. Enable the Phonetic search check box in the dropdown menu of the **Search button** to switch on phonetic search. The Search button is always available, regardless of whether you have opened the advanced search or not (see also section 7.2.11).



2. Enter a name in the general **Search string** field or in the **Name** field of the **Advanced Search**.

NOTE:

For the phonetic search to be able to output a hit, the first letter of the search term must be entered correctly.

The phonetic search does not support wildcards (see section 7.2.1 Wildcards)

3. Click on **Search** (only when Fast Search is not activated)


7.2.4 Location Filter

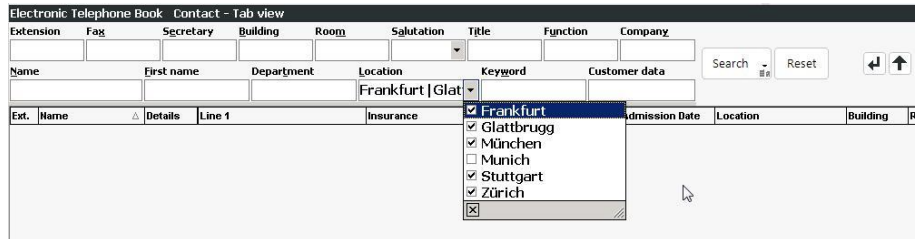
Location filters allows you to reduce the search results filtered by a single or multiple location.


Location Filters can be used in combination with phonetic search or search inside function.

Location filters can additionally be used for destination number search.

Procedure

1. Switch to advanced search by clicking on the  Button
2. Select / De-select the desired locations



3. Switch back to Free search by clicking on the  Button
4. Select the usage of location filter in the drop down box of the **Search** Button



5. Enter your search criteria - results will be filtered by the defined location(s)

7.2.5 Search Inside

This function allows you to search inside a search term without using a wildcards like "*" or "?"

Procedure

1. Enable the Search Inside Option check box in the drop down menu of the **Search** button to switch on "Search within a field"




2. Searchable fields are all fields in your telephone book
3. Example: If you do not know the complete name of a department you can enter a part of it – without wildcards – and in case of a match the results will be displayed in the grid

7.2.6 Hierarchical presentation of phonebook data

Telephone book data can be organized by hierarchic structures and displayed in the Concierge Client.

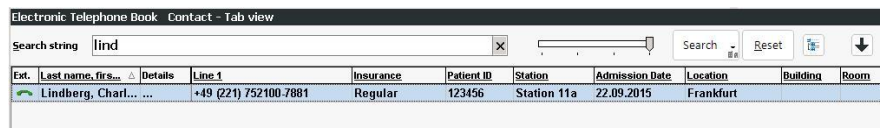
The relationship between participants to its manager(s) has to be assigned in Concierge Data Center.

If activated the icon  appears between “Reset” and “Advanced Search” Button.



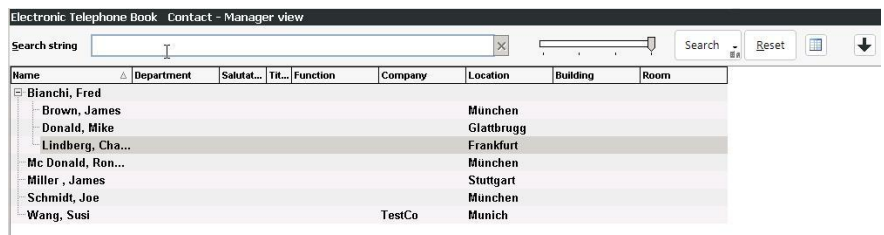
Procedure:

1. Search for a desired person (e.g. Lind). The result will be displayed in the data grid.



Ext.	Last name, first...	Details	Line 1	Insurance	Patient ID	Station	Admission Date	Location	Building	Room
7	Lindberg, Charl...		+49 (221) 752100-7881	Regular	123456	Station 11a	22.09.2015	Frankfurt		

2. Click on the “Hierarchy” Button



Name	Department	Salutat...	Tit...	Function	Company	Location	Building	Room
Bianchi, Fred								
Brown, James						München		
Donald, Mike						Glatthbrugg		
Lindberg, Cha...						Frankfurt		
Mc Donald, Ron...						München		
Miller, James						Stuttgart		
Schmidt, Joe						München		
Wang, Susi					TestCo	Munich		

3. The hierarchy view shows the desired person and the assignment to its manager / team lead etc.

Hint for Administrators:

This feature has to be activated in Concierge Data Center / System Data / Advanced Settings.

For details – see OpenScope Concierge, Administrator documentation

7.2.7 Starting the manual search

Procedure

1. Switch off fast search.
2. Enter your search criteria.
3. Confirm with the **ENTER** key.
Or:
Click on **Search** to start the search.
All contacts that match the search criteria are displayed in results list.
4. Use the arrow keys **↑** and **↓** on the keyboard (scroll in the results list) to highlight a data record in the results list.
The first telephone contact data of the marked data record is adopted in the **Destination** panel.

- Double-click on the data record to adopt the data of the selected contact in the **Details** tab.
- Click on **Reset** to clear the previous hit result, reset all entry fields and start a new search.

7.2.8 Free text search

The free text search enables you to get a more efficient and faster result. The entered search string is regulated by a slide switch (see figure). The scale reaches from a search only for name (last name) to a search for combinations of search fields.

Moving the pointer on the slide enhances the searchable fields. The fields which apply to the search are displayed underlined.

Electronic Telephone Book Contact - Tab view

Search string: * [X] [Slider]

Last name, first...	Det...	Salut...	Title	Function	Company	Department	Location	Keywords	Line 1	Building	Room
---------------------	--------	----------	-------	----------	---------	------------	----------	----------	--------	----------	------

When the search targets multiple fields (the slider is not on the left), it is possible to enter multiple search criteria's in the search string. Separating the values by "+" means the search values are combined by logical "and". For example, the beginning of the last name and the beginning of the department can be entered with a "+" in the search field. All members with both values will be found.

The logical "or" operator is "|" by default.

Pos.		Search for
1		Name (last name) only
2		Last name, first name
3		Configured Columns in Data Center with Attribute "Searchable"
4		All fields except E-Mail Address and additional Information.

NOTE:

E-Mail Addresses and Additional Information is not searchable

Hint for Administrators:

The searchable columns for 3rd Slider position can be configured in Concierge Data Center under System data / Client configuration / Layout and Custom specific member data.

For details – see OpenScape Concierge, Administrator documentation

7.2.9 Direct search via Double-click on DB value

A direct search for a dedicated grid value can be initiated by double-clicking on an output value of the data grid.

Procedure (Example):

1. The attendant has an list of results and needs an extract information

Electronic Telephone Book Contact - Tab view								
Search string *						Search		Reset
Ext.	Last name, first...	Details	Line 1	Insurance	Patient ID	Station	Admission Date	Location
?	Brown, James	...	+49 (221) 752100-7873	Privat	223344	Station 47b	02.10.2015	München
	Donald, Mike	...	+49 (221) 752100-7893	VIP	334455	Station 77c	11.09.2015	Glattbrugg
	Lindberg, Charl...	...	+49 (221) 752100-7881	Regular	123456	Station 11a	22.09.2015	Frankfurt
?	Mc Donald, Ron...	...	+49 (221) 752100-7883	Privat	987654	Station 99a	11.08.2015	München
?	Miller, James	...	+49 (221) 752100-7871	Regular	112233	Station 11a	04.09.2015	Stuttgart
?	Schmidt, Joe	...	+49 (221) 752100-7873	VIP	456711	Station 88a	02.09.2015	München

2. Only the information of patients of „Station 11a“ is needed
-> double-click on “Station 11a”

3. A direct search with this search criteria will be performed

Electronic Telephone Book Contact - Tab view								
Search string Station 11a						Search		Reset
Ext.	Last name, first...	Details	Line 1	Insurance	Patient ID	Station	Admission Date	Location
	Lindberg, Charl...	...	+49 (221) 752100-7881	Regular	123456	Station 11a	22.09.2015	Frankfurt
?	Miller, James	...	+49 (221) 752100-7871	Regular	112233	Station 11a	04.09.2015	Stuttgart

Hint:

Search by double-click must be activated in Concierge Data Center under Client configuration / Local settings.

For details – see OpenScape Concierge, Administrator documentation

7.2.10 Searching with Drag and Drop

The search string can easily be enhanced if a listed object from the search grid is dragged and dropped back to the search string

Procedure (Example):

1. Initial query is “Frankfurt”
2. Result below

Electronic Telephone Book Contact - Tab view												
Search string Frankfurt						Search		Reset				
Last name, first...	Details	Saluta...	Title	Function	Company	Department	Location	Keywords	Line 1	Building	Room	Cor
Bianchi, Fred	...	Mr.		Sales Manager	TestCo	CC SP UIP	Frankfurt	OSCC, ...	+49 (69) 79...	H1	521	VIP
Miller, Charles	...	Mr.		Consultant	TestCo	CC	Frankfurt		+49 (69) 79...	L1	B501	
Parker, Peter	...	Mr	Dr	Senior Manager	Company XY		Frankfurt		+49 (69) 79...			
Wang, Susi	...	Mrs.		Marketing Assistant	TestCO	Marketing	Frankfurt		+49 (69) 79...			

3. Enhancing the Search string with “TestCo” can be done by dragging the field value “TestCo” and dropping it back to the search string
4. New search string is now “Frankfurt” + “TestCo”

Electronic Telephone Book Contact - Tab view												
Search string Frankfurt+TestCo										Search	Reset	
Last name, first...	Details	Saluta...	Title	Function	Company	Department	Location	Keywords	Line 1	Building	Room	Cor
Bianchi, Fred	...	Mr.		Sales Manager	TestCo	CC SP UIP	Frankfurt	OSCC, ...	+49 (69) 79...	H1	521	VIP
Miller, Charles	...	Mr.		Consultant	TestCo	CC	Frankfurt		+49 (69) 79...	L1	B501	
Wang, Susi	...	Mrs.		Marketing Assistant	TestCO	Marketing	Frankfurt		+49 (69) 79...			

Hint:

The default operator for logical “and” is the + sign, the logical “or” is the | sign

5. Changing the operator to | combines “Frankfurt” or “TestCo”

Electronic Telephone Book Contact - Tab view												
Search string Frankfurt TestCo										Search	Reset	
Last name, first...	Details	Saluta...	Title	Function	Company	Department	Location	Keywords	Line 1	Building	Room	Cor
Bianchi, Fred	...	Mr.		Sales Manager	TestCo	CC SP UIP	Frankfurt	OSCC, ...	+49 (69) 79...	H1	521	VIP
Miller, Charles	...	Mr.		Consultant	TestCo	CC	Frankfurt		+49 (69) 79...	L1	B501	
Parker, Peter	...	Mr.	Dr	Senior Manager	Company XY		Frankfurt		+49 (69) 79...			
Scruggs, Geral...	...	Mrs.		Assistant	TestCo	CEO	Munchen		+49 (89) 79...			
Wang, Susi	...	Mrs.		Marketing Assistant	TestCO	Marketing	Frankfurt		+49 (69) 79...			

7.2.11 Advanced search

In Advanced search panel the search can be expanded by the following fields: **Extension, Fax, Secretary, Building and Room**. Also special functions for Function, Department, Location and Keywords are available here - see section 7.2.11.2 Department, location, keyword and Customer data search


In all alphanumerical entry fields, uppercase and lowercase are irrelevant to the search. All search terms can be entered without being complete.


All input fields are linked with a logical *and* for the search, thus narrowing down the search results. So if you would like to search for multiple criteria, enter a search term into each of the corresponding fields.

In this way, you can link one or more search criteria.

The search result is displayed in the **Contact – Tab view** panel.

1. Open the **Search** tab.

2. Click on 
The advanced search fields are displayed.

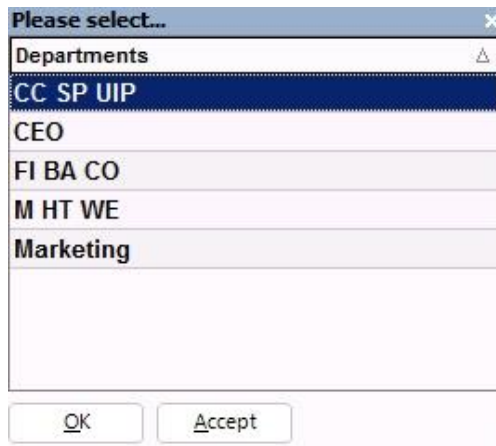
3. Click on 
The advanced search fields are hidden.

Electronic Telephone Book Contact - Tab view																
Extension	Fax	Secretary	Building	Room	Salutation	Title	Function	Company								
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>								
Name	First name	Department	Location	Keyword	Customer data											
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>											
Ext.	Cal.	Name	Details	Salutation	Title	Function	Company	Department	Location	Keywords	Line 1	Building				
												Room				

7.2.11.1 Get grid value

This function should give you help on entering additional search criteria. For example you have a search result for several contacts and you also want to focus on the company now,

- Simply highlight a contact with the respective company:



2. Select one of the departments from the department list.

- Click on **Accept** or double-click on the selected department.
The search result is displayed in the **Contact – Tab view** panel, e.g. all contacts of the selected department are displayed. The department name is accepted in the **Department** search field.

Keyword search

In the **Keyword** entry field, you can search for multiple keywords.

If you

- want to search for two search terms with an *AND* link, separate the search terms with a plus (+)
- want to search for two search terms with an *OR* link, separate the search terms with a pipe character (|)

Example: DEL*+ .NE* finds contacts with the keywords *DELPHI* and *.NET*.

Search result: All keywords entered in the **Keyword** entry field are concatenated. If the entry field is too small to display all search criteria, you can move over the field with the mouse pointer. An info field shows the full text.

Location search

The **Location** parameter can be pre assigned in the **DataCenter under System data / Client configuration / Advanced / ETB Options**. It can always be overwritten in the user interface if the search pertains to other locations.

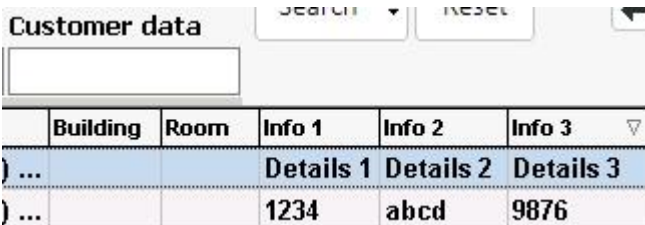
Searching with hotkeys

The search for a Department, Location and Keyword is supported by language-based hotkeys which can be used instead of double clicking on the search field...

Search field	Hotkey
Department	Ctrl+Alt+T
Location	Ctrl+Alt+L
Keyword	Ctrl+Alt+W

Customer data search

For the ETB entries up to 25 additional data fields are possible. Here an example with three customer data fields:



Customer data					
<input type="text"/>					
	Building	Room	Info 1	Info 2	Info 3 ▾
) ...			Details 1	Details 2	Details 3
) ...			1234	abcd	9876

Entered search criteria in the field **Customer data** will start a search within every data field.

Hint for Administrators:

Customer data fields are configurable in Concierge Data Center under System data – Client configuration – Customer specific member data. You can edit these data fields for each ETB entry under Contact Data – Contact.

7.2.12 Searching with multiple dial plans

Multiple dial plans stands for an environment with multiple area codes. In this case, the same extension number can have multiple area codes for different persons.

Example:

+49 (69) 123 - 4711	for Mr. Tester and
+49 (40) 456 - 4711	for Mrs. Test

“69” and “40” are the area codes.

If only the extension of a phone number is entered in the destination number field for search (here: 4711), all telephone book entries with this extension are displayed.

7.3 Search result

Information pertaining to the search result is displayed in several panels. The overview shows all of the information on this result and the first contact. The following views are available:

- Tab view
- Details
- Contact list
- Calendar
- Destination with Extension and optionally UC, Circuit, Skype or Microsoft Teams or Unify Office presence status

NOTE:

If different Concierge contacts have the same e-mail address in the presence record, and they would match a search, the Presence Status will be shown for the first search result only.

Call type, called number Type: <input type="text"/> For: <input type="text"/> Name: <input type="text"/> Comment: <input type="text"/>		Caller Number: <input type="text"/> Name: <input type="text"/> Company: <input type="text"/> Location: <input type="text"/>		Destination → +49 (69) 79309-1721 Bianchi, Fred Extension status: Phone: Available DND: <input type="checkbox"/> Waiting: 0 UC state: Available Contact details: <input type="button"/> Forward: <input type="button"/> Paging: <input type="button"/>		Speed ? Charles Jules BOffice Assist																																																																																																																								
Call functions Alt+F2 Park F2 Transfer F4 Hold F5 Line 1 Alt+F7 Alternate Alt+F5 Conference F7 Disconnect Alt+F11 Queuing																																																																																																																														
Electronic Telephone Book Contact - Tab view Search string: <input type="text"/> Search Reset																																																																																																																														
<table border="1"> <thead> <tr> <th>Ext.</th> <th>Uc.</th> <th>Cal.</th> <th>Name</th> <th>Det...</th> <th>Sakut...</th> <th>Title</th> <th>Function</th> <th>Company</th> <th>Department</th> <th>Location</th> <th>Keywords</th> <th>Line 1</th> <th>Building</th> <th>Room</th> <th>Info 1</th> <th>Info</th> </tr> </thead> <tbody> <tr> <td></td> <td></td> <td></td> <td>Bianchi, Fred</td> <td>...</td> <td>Mr.</td> <td>Sales Mana...</td> <td>TestCo</td> <td>CC SP UIP</td> <td>Frankfurt</td> <td>Finance...</td> <td>Managi...</td> <td>+49 (69) ...</td> <td>H1</td> <td>521</td> <td></td> <td></td> </tr> <tr> <td></td> <td></td> <td></td> <td>Marquardt, Emma</td> <td>...</td> <td>Ms.</td> <td>Marketing Di...</td> <td>ComCo</td> <td>M HT WE</td> <td>Berlin</td> <td></td> <td></td> <td>+49 (69) ...</td> <td>HO 51</td> <td>421</td> <td></td> <td></td> </tr> <tr> <td></td> <td></td> <td></td> <td>Master, Peter</td> <td>...</td> <td>Mr.</td> <td>Head of Fina...</td> <td>ComCo</td> <td>CEO</td> <td>Berlin</td> <td></td> <td></td> <td>+49 (69) ...</td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td></td> <td></td> <td></td> <td>Oneill, Samuel</td> <td>...</td> <td>Mr.</td> <td>Financial Ac...</td> <td>ComCo</td> <td>FI BA CO</td> <td>London</td> <td></td> <td></td> <td>+49 (69) ...</td> <td></td> <td></td> <td>1234</td> <td>abc</td> </tr> <tr> <td></td> <td></td> <td></td> <td>Scruggs, Gerald...</td> <td>...</td> <td>Mrs.</td> <td>Assistant</td> <td>TestCo</td> <td>CEO</td> <td>München</td> <td></td> <td></td> <td>+49 (69) ...</td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td></td> <td></td> <td></td> <td>Wang, Susi</td> <td>...</td> <td>Mrs.</td> <td>Marketing A...</td> <td>TestCO</td> <td>Marketing</td> <td>Frankfurt</td> <td></td> <td></td> <td>+49 (69) ...</td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table>								Ext.	Uc.	Cal.	Name	Det...	Sakut...	Title	Function	Company	Department	Location	Keywords	Line 1	Building	Room	Info 1	Info				Bianchi, Fred	...	Mr.	Sales Mana...	TestCo	CC SP UIP	Frankfurt	Finance...	Managi...	+49 (69) ...	H1	521						Marquardt, Emma	...	Ms.	Marketing Di...	ComCo	M HT WE	Berlin			+49 (69) ...	HO 51	421						Master, Peter	...	Mr.	Head of Fina...	ComCo	CEO	Berlin			+49 (69) ...								Oneill, Samuel	...	Mr.	Financial Ac...	ComCo	FI BA CO	London			+49 (69) ...			1234	abc				Scruggs, Gerald...	...	Mrs.	Assistant	TestCo	CEO	München			+49 (69) ...								Wang, Susi	...	Mrs.	Marketing A...	TestCO	Marketing	Frankfurt			+49 (69) ...				
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Contact list <table border="1"> <thead> <tr> <th>No</th> <th>Type</th> <th>Connection</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>Line 1</td> <td>+49 (69) 79309-1721</td> </tr> <tr> <td>2</td> <td>E-mail</td> <td>fred.bianchi@coc-k...</td> </tr> <tr> <td>3</td> <td>Pager</td> <td>4 2225</td> </tr> <tr> <td>4</td> <td>Secretary</td> <td>+49 (69) 79309-1700</td> </tr> </tbody> </table>								No	Type	Connection	1	Line 1	+49 (69) 79309-1721	2	E-mail	fred.bianchi@coc-k...	3	Pager	4 2225	4	Secretary	+49 (69) 79309-1700																																																																																																								
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Calendar Wednesday, July 08, 6:00am 7:00am 8:00am 9:00am 10:00am 11:00am																																																																																																																														

7.3.1 Tab view

The tab view provides an overview of all results that match this search. A maximum of 200 result lines is displayed.

The following information is displayed for each contact that matches the search criteria: the state of the extension, optionally the UC, Circuit, Skype or Microsoft Teams or Unify Office presence state as well as the calendar state, the name and other parameters.







For example - With UC status:









































































Ext.	Uc.	Cal.	Last name, first name
			Bianchi, Fred
			Marquardt, Emma
			Master, Peter
			Oneill, Samuel
			Scruggs, Geraldine





































Without UC, Circuit, Skype or Microsoft Teams or Unify Office presence status:

Ext.	Cal.	Name
		Buenemann, An...
		Heinrich, Andreas
		Landau, Alexan...
		Mennert, Andreas

The view is a snapshot, e.g. the state is not automatically refreshed. The state is only refreshed when a new search is performed in the telephone book.

Icons Ext. and Cal.	Status
	The phone is idle.
	The phone is busy.
	The phone is out of service
	Telephone status cannot be determined and displayed.
 	<p>Calendar status display</p> <p>Indicates whether the contact is currently present /absent. This is based on the information stored in the Concierge calendar. Absence is indicated by a red bar.</p> <p>The length of the displayed absence can be configured. The predefined standard value is +/- 15 minutes of the current time.</p> <p>For example: If a contact is absent at 10:33, the red marking extends from 10:18 to 10:48.</p> <hr/> <p>NOTE:</p> <p>When coupled to an external calendar, the calendar entries are displayed for all visible contacts from the marked contact in the default view. The number of contacts for whom the calendar entries are to be displayed can be configured.</p> <hr/>

Icons Ext. and Cal.	Status																																																						
UC, Circuit, Skype or Microsoft Teams presence state	<p><u>For installations with UC integration</u> The UC state set by the contact is displayed. The attendant can change the UC state. The following UC states are available:</p> <table border="1" data-bbox="783 443 1104 757"> <thead> <tr> <th>Icon</th><th>State</th></tr> </thead> <tbody> <tr><td></td><td>Unknown</td></tr> <tr><td></td><td>Offline</td></tr> <tr><td></td><td>Busy</td></tr> <tr><td></td><td>Away</td></tr> <tr><td></td><td>Do not disturb</td></tr> <tr><td></td><td>Available</td></tr> </tbody> </table> <p><u>For installations with Circuit integration</u> The Circuit state set by the contact is displayed. The attendant cannot change the Circuit state. The following Circuit states are available:</p> <table border="1" data-bbox="783 896 1104 1209"> <thead> <tr> <th>Icon</th><th>State</th></tr> </thead> <tbody> <tr><td></td><td>Unknown</td></tr> <tr><td></td><td>Offline</td></tr> <tr><td></td><td>Circuit call</td></tr> <tr><td></td><td>Away</td></tr> <tr><td></td><td>Do not disturb</td></tr> <tr><td></td><td>Online</td></tr> </tbody> </table> <p><u>For installations with Skype integration</u> The Skype state set by the contact is displayed. The attendant cannot change the Skype state. The following Skype states are available</p> <table border="1" data-bbox="783 1348 1256 1917"> <thead> <tr> <th>Icon</th><th>State</th></tr> </thead> <tbody> <tr><td></td><td>Offline</td></tr> <tr><td></td><td>In a meeting</td></tr> <tr><td></td><td>Busy</td></tr> <tr><td></td><td>In a conference call</td></tr> <tr><td></td><td>In a presentation</td></tr> <tr><td></td><td>Be right back</td></tr> <tr><td></td><td>Away</td></tr> <tr><td></td><td>Do not disturb</td></tr> <tr><td></td><td>Off work</td></tr> <tr><td></td><td>Out of office</td></tr> <tr><td></td><td>Out of office (Auto answ.)</td></tr> <tr><td></td><td>Online</td></tr> </tbody> </table>	Icon	State		Unknown		Offline		Busy		Away		Do not disturb		Available	Icon	State		Unknown		Offline		Circuit call		Away		Do not disturb		Online	Icon	State		Offline		In a meeting		Busy		In a conference call		In a presentation		Be right back		Away		Do not disturb		Off work		Out of office		Out of office (Auto answ.)		Online
Icon	State																																																						
	Unknown																																																						
	Offline																																																						
	Busy																																																						
	Away																																																						
	Do not disturb																																																						
	Available																																																						
Icon	State																																																						
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	Offline																																																						
	In a meeting																																																						
	Busy																																																						
	In a conference call																																																						
	In a presentation																																																						
	Be right back																																																						
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Icons Ext. and Cal.	Status														
	<p><u>For installations with Microsoft Teams integration</u></p> <p>The Teams state set by the contact is displayed.</p> <p>Note: The attendant cannot change the Microsoft Teams presence state using concierge client.</p> <p>The following Teams states are available:</p> <table> <tr> <th>Icon</th><th>State</th></tr> <tr> <td></td><td>Unknown</td></tr> <tr> <td></td><td>Offline</td></tr> <tr> <td></td><td>Busy</td></tr> <tr> <td></td><td>Away</td></tr> <tr> <td></td><td>Do not disturb</td></tr> <tr> <td></td><td>Online</td></tr> </table>	Icon	State		Unknown		Offline		Busy		Away		Do not disturb		Online
Icon	State														
	Unknown														
	Offline														
	Busy														
	Away														
	Do not disturb														
	Online														
	<p><u>For installations with Unify Office integration</u></p> <p>The Unify Office presence state set by the contact is displayed.</p> <p>Note: The attendant cannot change the Unify Office Presence state using the concierge client.</p> <p>The following Unify Office states are available:</p> <table> <tr> <th>Icon</th><th>State</th></tr> <tr> <td></td><td>Unknown</td></tr> <tr> <td></td><td>Offline</td></tr> <tr> <td></td><td>Busy</td></tr> <tr> <td></td><td>Away</td></tr> <tr> <td></td><td>Do not disturb</td></tr> <tr> <td></td><td>Online</td></tr> </table>	Icon	State		Unknown		Offline		Busy		Away		Do not disturb		Online
Icon	State														
	Unknown														
	Offline														
	Busy														
	Away														
	Do not disturb														
	Online														

When selecting a contact from the result list, the status is also displayed in the Destination panel.

7.3.1.1 Sorting search results

You can sort every column by clicking in the desired column header. Sorting helps you find the required contact quickly.

Prerequisite

- By default, sorting (pre-setting) is performed by **Name**.
- Upper case and lower case are not relevant to the sorting.
- Mutated vowels are converted to the corresponding vowel combinations.
- ß is changed to ss.

Procedure

1. Configure a search and start the search.
2. Click on the column heading in the results list, e.g. **Function**, to sort the column in ascending alphabetical order.
3. Click on the column heading in the results list again, e.g. **Function**, to sort the column in descending alphabetical order.

7.3.2 Contact details



The contact detail view can be opened by clicking on the icon on the desired contact. Clicking the Icon again will close the dialog.

Hint:

Double-clicking on a contact will open as well the contact data window if Search on double click is de-activated.

The feature can be defined in Data Center / System data / Client configuration / Local Settings.

For details – see OpenScape Concierge, Administrator documentation

Detailed information on the contact is displayed:

- Contact Data
- Customer Data
- Contacts
- Calendar
- Unavailable (Absences)
- Additional Info
- Keywords

N.	Country	Area	Trunk	Tie line	Line	Type	Connection
1 +	49	69	79309		1721	Line 1	
2			4		2225	Pager	
4 +	49	69	79309		1700	Secret...	
5						E-mail	fred.bianchi@coc-ko...

On the left hand side the personal data window, postal address and company information is displayed.

Depending on the selected tab further information about the selected contact is available.

7.3.2.1 Comment in Contact Details

Additionally you can enter a comment about the participant. This comment is personalized and only visible for Concierge users.

Personal data, Postal address

Mayer, Andreas

Germany

Company

Unify GmbH

Frankfurt / Sales

Account Manager

Comment about participant

Save

No.	Country/Area	Trunk	Tie line	Line	Type	Connection	Building
1	49	221	752100	7081	Line 1		

Contacts | Additional info | Keywords

Comments can be inserted / updated via keypad or with Drag and Drop

Hint: The field “comment” is a searchable field in the Telephone book

7.3.2.2 Customer data

Customer data for the selected telephone book entry is displayed here, dependent on the configuration (see also chapter 7.2.11.2).

Customer data	Values
Info 1	Details 1
Info 2	Details 2
Info 3	Details 3

Customer data | Contacts | Calendar | Unavailable | Additional info | Keywords

7.3.2.3 Contacts

Shows all availabilities how a contact can be reached.

N.	Δ	+	Country	Area	Trunk	Tie line	Line	Type	Connection
1	+		49	69	79309		1721	Line 1	
2					4		2225	Pager	
4	+		49	69	79309		1700	Secretary	
5								E-mail	fred.bianchi@coc-l

7.3.2.4 Calendar

The calendar is supplied with data entered by attendants in the Concierge calendar, but it is possible to integrate an external calendar also so additional information can come from calendar entries of the contacts.

The calendar entries are displayed:

- in the Concierge calendar view under the contact details

	Tuesday, July 07	Wednesday, July 08	Thursday, July 09																																																																																												
8 ⁰⁰				<div>June, 2015</div> <table><tr><td>S</td><td>M</td><td>T</td><td>W</td><td>T</td><td>F</td><td>S</td></tr><tr><td>31</td><td>1</td><td>2</td><td>3</td><td>4</td><td>5</td><td>6</td></tr><tr><td>24</td><td>7</td><td>8</td><td>9</td><td>10</td><td>11</td><td>12</td></tr><tr><td>25</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td></tr><tr><td>26</td><td>21</td><td>22</td><td>23</td><td>24</td><td>25</td><td>26</td></tr><tr><td>27</td><td>28</td><td>29</td><td>30</td><td></td><td></td><td></td></tr></table> <div>July, 2015</div> <table><tr><td>S</td><td>M</td><td>T</td><td>W</td><td>T</td><td>F</td><td>S</td></tr><tr><td>27</td><td></td><td></td><td></td><td>1</td><td>2</td><td>3</td></tr><tr><td>28</td><td>5</td><td>6</td><td>7</td><td>8</td><td>9</td><td>10</td></tr><tr><td>29</td><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td></tr><tr><td>30</td><td>19</td><td>20</td><td>21</td><td>22</td><td>23</td><td>24</td></tr><tr><td>31</td><td>26</td><td>27</td><td>28</td><td>29</td><td>30</td><td>31</td></tr><tr><td>32</td><td>2</td><td>3</td><td>4</td><td>5</td><td>6</td><td>7</td></tr></table>	S	M	T	W	T	F	S	31	1	2	3	4	5	6	24	7	8	9	10	11	12	25	14	15	16	17	18	19	26	21	22	23	24	25	26	27	28	29	30				S	M	T	W	T	F	S	27				1	2	3	28	5	6	7	8	9	10	29	12	13	14	15	16	17	30	19	20	21	22	23	24	31	26	27	28	29	30	31	32	2	3	4	5	6	7
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Customer data	Contacts	Calendar	Unavailable	Additional info																																																																																											

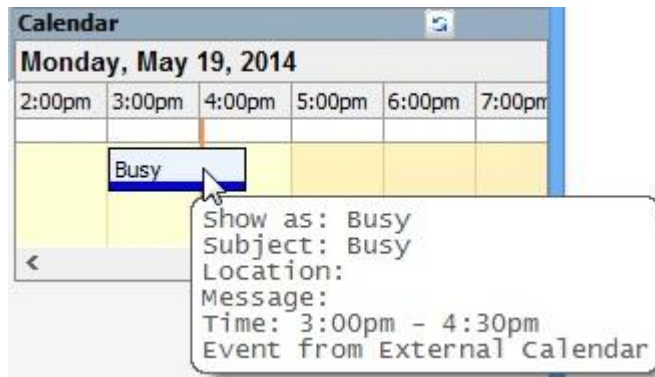
- in the extension status panel (for all attendants of the tenant) in the search mask for the selected contact



or



- in the Calendar panel of ETB



NOTE:

When connected to an external calendar, the calendar entries are displayed in the details for the selected contact if the contact can be uniquely identified via the e-mail address.

It depends on the settings on the Exchange Server whether „available“/“idle“ and „busy“ are shown or more details to the Calendar entry. Please contact your Exchange Administrator for more details.


The contact search displays the calendar entries for the first five contacts (beginning from the selected contact).

7.3.2.5 Unavailable (Absences)

The absences of a contact can be entered in the Concierge calendar by the attendant. It is immediately visible for all other attendants of this tenant.

From	Till	Reason
7/9/2015	7/10/2015	Sales Meeting
7/12/2015	7/13/2015	Training

Procedure

1. Open the **Unavailable** tab.
2. Click on  on the bottom edge of the tab. A calendar appears:

From	Till	Reason
19.06.2014 14:00:00		

19.06.2014 14:00:00

◀ Juni ▶

◀ 2014 ▶

M	D	M	D	F	S	S
26	27	28	29	30	31	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	1	2	3	4	5	6

14:00:00

Now

Clear

OK

- Enter the beginning and end of the absence with the date and time:
Select the date and time (calendar function and selection list) and confirm with **OK**.
Or:
Enter the date and time directly into the **From** and **Till** entry fields.
- Enter the reason for the absence in the **Reason** field.

7.3.2.6 Additional info

Additional info is a possibility having specific information to a person before transferring a call.

Example: "Do not call Dr. Willis directly – please consult the secretary" or "Dr. Willis is on Fridays not available in the hospital"

It can be seen on the **Additional info** tab in the contact data panel of the selected contact.

Hint:

Additional Information can be configured to be shown in the search grid.

The information can be entered by supervisors using Concierge Data Center or directly in the Concierge GUI.

Additional info
Always call assistant first
Working hours 8:00 till 16:00

Customer data

Contacts

Calendar

Unavailable

Additional info

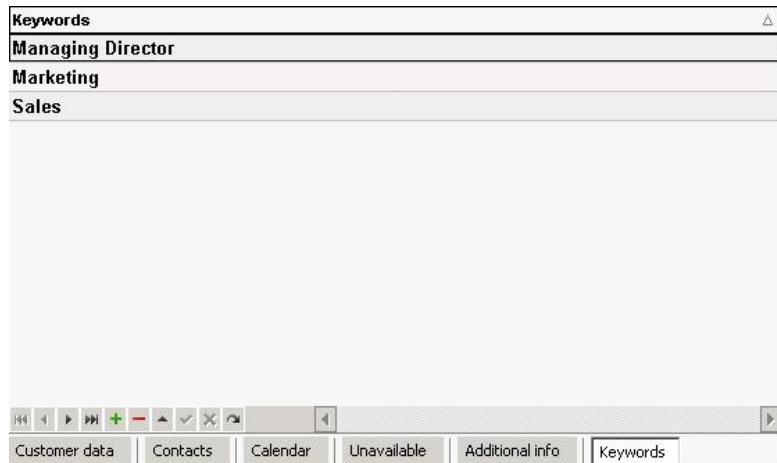
Keywords

7.3.2.7 Keywords

Keywords can be helpful when searching for areas of responsibility – for example in order to find a contact person for a certain product.

Keywords can be entered directly on the Concierge interface or via the Concierge Data Center or imported into the Telephone book.

The search for keywords is performed as described in section 7.2.11.2 Department, location, keyword and Customer data search.



7.3.3 Contact list

In order to see all contact list data you do not have to double-click on the contact. It is displayed on the right side next to the search result table in the main window as well, when a focus is set on the contact – also see section 7.3.2.2.

Contact list		
No	Type	Connection
1	Line 1	+49 (69) 79309-1721
2	E-mail	fred.bianchi@Test...
3	Pager	+49 (69) 79309-2225
4	Secretary	+49 (69) 79309-1700

All contact data (phone, e-mail, fax, etc.) of the selected person are displayed in the **Contact list**.

The first contact (Line 1) is automatically adopted in the destination number field of **Destination panel** and the associated state is displayed.

Display numbers in different colors

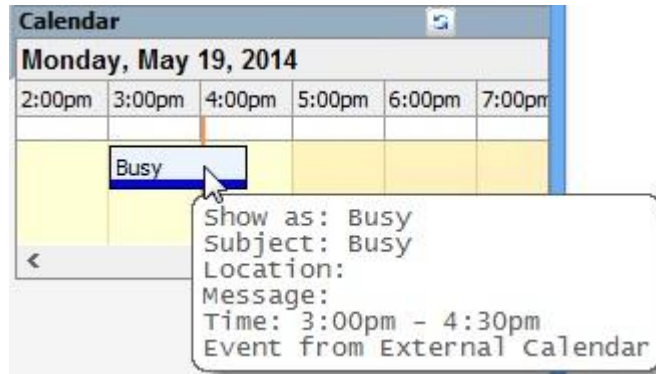
The contact numbers and addresses can be displayed in different colors if needed, for example:

- Phone number, e.g. the private contact number: red
- Mobile phone number: blue
e.g. this number is not permitted to be passed on

The color code of the contact numbers is set in Concierge DataCenter.

7.3.4 Calendar view

In order to see the contact's calendar you do not have to double-click on the contact. It is displayed on the right side next to the search result table in the main window as well – also see section 7.3.2.4 Calendar



7.4 Braille Support

In order to ensure greater accessibility, Concierge allows the user to use Braille Support. This option causes changes to the components of the advanced search fields and ETB to allow the use of screen readers based on IAccessibility interface (such as JAWS) to provide audible support for the visually impaired.

In the new interface, both the advanced search fields and the ETB have had some of their functionality reduced to focus on better meeting the essential needs of the visually impaired user.

In the advanced search fields both Location Filter and Salutation options have been removed. In addition, the special functions of the fields Location, Department, Keyword and Customer data have also been removed to avoid greater user effort while performing their searches.

A screenshot of the 'Electronic Telephone Book' interface, specifically the 'Contact - Tab view'. The interface features a search form with fields for 'Extension', 'Fax', 'Secretary', 'Building', 'Room', 'Salutation', 'Title', 'Function', and 'Company'. Below these fields are 'Name', 'First name', 'Department', 'Location', 'Keyword', and 'Customer data'. To the right of the search fields are 'Search' and 'Reset' buttons, along with navigation arrows. At the bottom, there is a table with columns: 'Name', 'Det...', 'Salutation', 'Title', 'Function', 'Company', 'Department', 'Location', 'Keywords', 'Line 1', and 'Building'.

The ETB has been slightly redesigned and the fields that apply to the search are no longer displayed underlined as well as the columns responsible for showing the status of the extension, calendar and presence node have been removed. In addition, the features Hierarchical presentation of phonebook data, Direct search via Double-click on DB value and Searching with Drag and Drop have been removed to prevent wrong user clicks.

Name	Details	Salutati...	Title	Function	Company	Departm...	Location	Keywo...	Line 1	Buil...	Room	Com...
contact1, Contact1	...	Mr Cont...	Mr	Developer	Atos	Develop...	Curitiba		+55 (41...	Block1	1	
contact2, Contact2	...	Mr Cont...	Mr	Developer	Atos	Develop...	Curitiba			Block1	2	Nothing
contact3, Contact3	...	Mss Co...	Mss	Supervisor	Atos	Supervisor	São Pa...		+55 (41...	-	-	Chef

Hint for Administrators:

This feature has to be activated in Concierge Data Center / User administration / Accounts.

For details – see OpenScape Concierge, Administrator documentation.

8 Extras

Several additional features can be found under menu button **Extras**:



Clicking on the arrow down symbol opens a menu with the following options (depending on the configuration):

- Internet
- Call history
- Bulletin board
- Master data
- Logged on attendants
- Queues
- OS4K Class of Service (with OpenScape4000 only)
- Wrap-up coding
- Notice pad
- Message
- SMS
- Direct dial buttons configuration
- Display
- Reset user interface

The Extras are bundled in a separate window, which opens when clicking on one of the **Extras** in the drop down menu or directly by clicking on **Show**.

Hint for Administrators:

Visibility of every tab except Display is configurable in OpenScape Concierge DataCenter under System data / Client configuration. Visibility of tab Display can be configured in OpenScape Concierge DataCenter under User administration – Accounts.

For details see OpenScape Concierge, Administrator Documentation

Arrange tabs

The tabs are dynamic, which means that you can change their position using drag and drop.

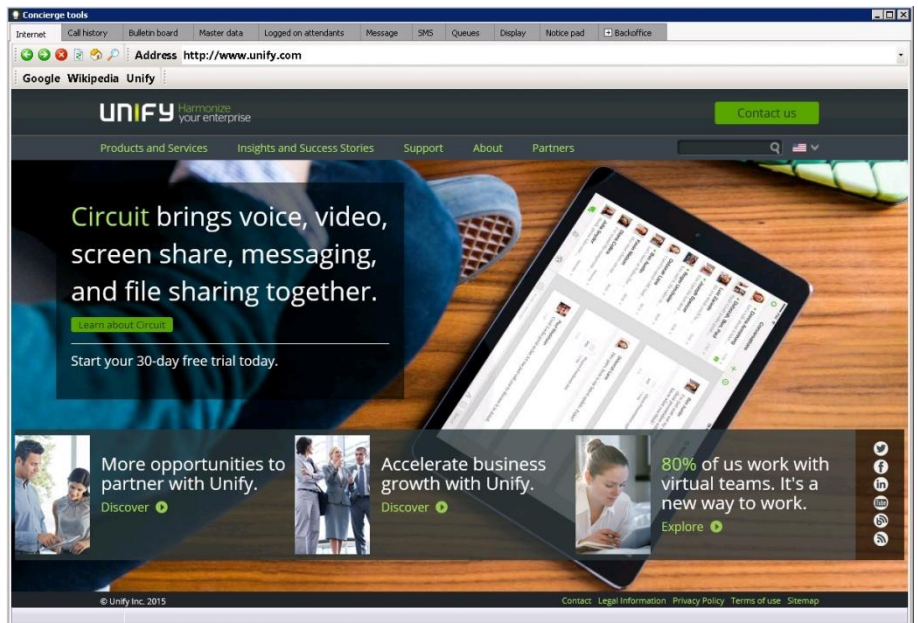
Procedure

1. Click on any tab.
2. Drag this tab onto another tab and release it.
When you release the mouse button, both tabs are moved.

8.1 Internet

Clicking on the **Internet** tab opens the browser within the tab area. This allows the user to browse the Intranet or Internet.

It is possible that there are configurable link buttons. The link buttons can be used in addition to the entry bar if the entry bar was not blocked to prevent the entry of an address. Up to 12 URLs can be stored.



The internal browser can be disabled if the user prefers to use the machine's default browser. By doing this, every click on the Internet tab will open the default browser.

Hint for Administrators:

Configuration of the Internet tab can be done in Concierge DataCenter under System Data / Client configuration / Browser.

For details see OpenScape Concierge, Administrator Documentation

8.1.1 Parameter transfer

For the Internet links, the values in the following fields can be transferred from the **Search** tab to the **Internet** tab: **Name**, **Department**, **Function** and **Company**. During a search, the values in these fields are used as search terms for searching the Internet. This makes searching the Internet faster and simpler.

Parameters for Internet page selection:

- **ct_name**
Last name of the contact selected in the search table. If there are no search results, the entry in the **Name** search field is used.
- **ct_department**
Name of the department of the contact selected in the search table. If the entry is empty or there are no search results, the entry in the **Department** search field is used.
- **ct_function**
Name of the function of the contact selected in the search table. If the

entry is empty or there are no search results, the entry in the **Function** search field is used.

- `ct_company`
Name of the company of the contact selected in the search table. If the entry is empty or there are no search results, the entry in the **Company** search field is used.
- `ct_anl`
The telephone number of the caller can be transmitted.

Example

If contacts cannot always be reached at their desk and if they work at different times, for example, the user can enter the name of the contact in the **Search** tab in OpenScape Concierge.

If the associated entry is found in the phone book, you can display the working schedule of the contact by clicking on the **Internet** tab. The call can then be transferred directly to the contact or to a specified substitute.

8.1.2 Click and Dial

If a telephone number is displayed on an HTML page, this number can be dialed through OpenScape Concierge using "Click and Dial". This requires that the corresponding http parameters have been set up and that the HTML page supports the "Click and Dial" function.

8.1.3 Limited Internet access

Access to the Internet can be limited within OpenScape Concierge application. The opening of a new browser window within the tab internet as well as address input can be prevented.

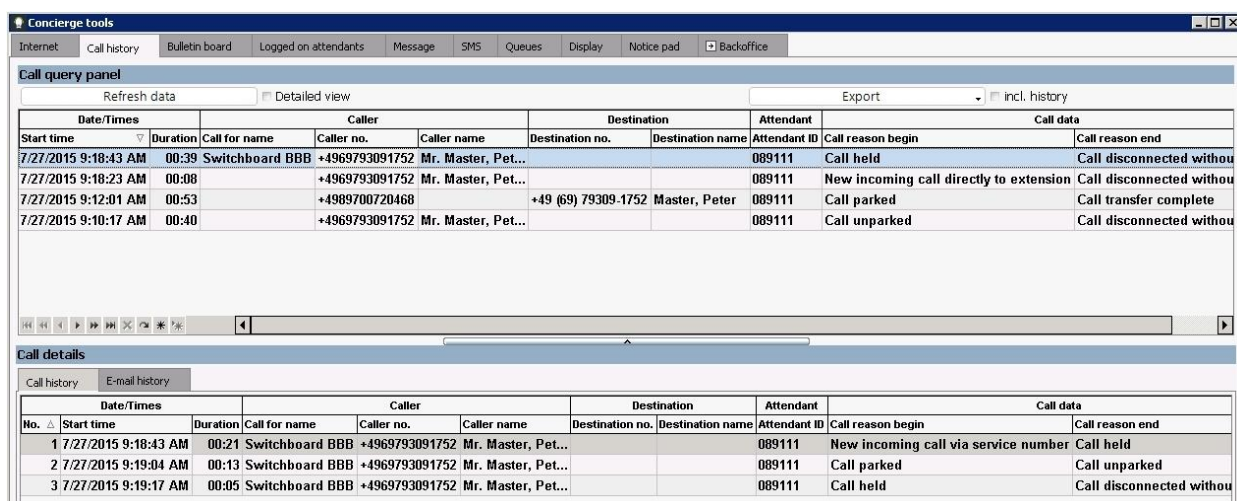
8.2 Call history

In the **Call history** tab you can track and monitor your switchboard call activity.

It shows a complete history of your recent calls including sent e-mails. A **Detailed view** can be switched on to see additional information.

NOTE: when connected on OSCC the abandoned calls (in queue or in the attendant) are not displayed and counted in call history/journal or Concierge reports.

The time period of how long calls are displayed in the call history tab can be configured by an administrator.



Enable the check box **Detailed view** to show additional call data.

Entries can be updated by clicking on button **Refresh data**.

The Call history is divided into two sections. The upper part **Call query panel** lists the initial contacts with customers. The lower section is divided in tab **Call history** and **E-mail history**.

8.2.1 Call details – Call history

The tab **Call history** provides detailed information of every single step of the switchboard transactions for the selected call in the upper section.

8.2.2 Call details – E-Mail history

If you mark a call in the upper section you can see associated e-mail transactions in the tab **E-mail history**.

The following options in the tab E-Mail history specify the results:

Button	Function
Selected call	Shows all send E-Mail which relates to the selected call
Selected call – called number	Shows all send E-Mails which relates to the calling parties number
Selected call – destination number	Shows all send E-Mails which relates to a selected destination number
All E-Mail in period	Shows all send E-Mails within a period of time

NOTE:

The email history section displays all sent emails, regardless of whether they were sent successfully or failed.

8.2.3 Using the telephone numbers in the Call history

Procedure

By double clicking a phone number in the call history, a call can be:

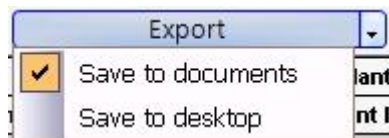
- initiated, if the attendant is idle
- transferred, if the attendant is in a active call

- consulted, if the attendant is in a held call

Also all fields can be copied with the key combination **Ctrl+C**.

8.2.4 Export of the call history

The call history shown in the Call query panel can be exported to a .csv file. You have either the option to export the call history to the desktop or to the documents folder. Select your choice and click on **Export**.



The file has the name “Callhistory_yyyymmdd_hhmmss_Main.csv”, e.g. “Callhistory_20150729_100519_Main.csv”. If you select ☒ incl. history next to the Export button then a second .csv file will be created if you click on **Export**. This second file includes the detailed switchboard transactions of the selected entry in the **Call query panel**.

The file has the name “Callhistory_yyyymmdd_hhmmss_Details.csv”, e.g. “Callhistory_20150729_101841_Details.csv”.

NOTE:

The E-mail history is not included in the export files.

8.3 Bulletin Board

The bulletin board is used for displaying attendant-related messages. Users can find out from the stored messages, for example, about restricted availability due to company meetings, construction works, flexi-times, maintenance activities on the telephone system, etc. The bulletin board is split into sections that can be accessed individually by selecting the Region.

Select region:	<All regions>			
Notice	From	Until	Date	Changed by
Infrastructure townhall meeting	7/27/2015	7/27/2015	7/27/2015	
Sales and marketing meeting	7/27/2015	7/28/2015	7/27/2015	

OpenScape Concierge users have the possibility to place entries on the bulletin board or modify or delete these.





NOTE:

In contrast to the Notice pad, all data in bulletin board can be seen by every Concierge User logged in to this tenant.

The database functions can be selected with these function buttons, which can then be used to search for, change, create and delete entries.



Some selected functions are listed in the next table:

Button	Function
	Adds a new (blank) entry
	Deletes the selected entry (a confirmation prompt follows)
	Processing of the selected or new entry is completed and the data is transferred to the database
	Processing of the selected or new entry is canceled

8.4 Logged on attendants

The **Logged on attendants** tab shows the state of the attendants in real-time. Every user sets his state using the state buttons. Simply double-click on an entry to establish a connection to the user.

The connection number is adopted into the destination field.



Name	Comment	Extension	Attendant state
Bianchi, Fred	Imported (OSCC)	+4989789300	Available - Idle

The display shows all attendants assigned to the tenant for which the user has logged on as configured in OpenScape Concierge DataCenter.

NOTE:

This tab only displays users which are configured as Concierge users in Concierge Data Center.

8.5 Notice pad

The notice pad is for personal entries.

It displays for example notes, contacts and reminders, and you can create more types of entries.

- **Notice** is used to store information.
- **Contact** has the purpose of supporting storage options for private contact data. If a note is stored as a **Contact** and if a phone number is stored for this contact, dialing can be performed directly from the contacts. When idle, the phone number is dialed by clicking on the phone symbol.
When holding, clicking on the phone symbol activates consulting while for active calls, clicking on the phone symbol is used for blind transfer.
- For the **Reminder** type, a date can be stored. If the reminder alarm is activated, the reminder appears at the specified time in a message window.

Some **Notice pad types** can be freely defined to allow, for instance, maintenance of private contact data groups.

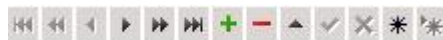
NOTE:

All data in the notice pad is private data of the attendant and cannot be viewed by other attendants.

Drag a column heading here to group by that column.							
Notice				Contact		Reminder	
Type	Name	Comment	Updated on	Phone number	Dial	Reminder in	Alarm
Contact	Paul	Meeting	7/27/2015 2:37:1...	+49897070745...		20 min.	7/27/2015 2:57:1... <input checked="" type="checkbox"/>
Notice		Sales Presentation	7/27/2015 2:37:1...			10 hours	7/28/2015 12:37:... <input checked="" type="checkbox"/>
Reminder		Server update	7/27/2015 2:37:2...			2 days	7/29/2015 2:37:2... <input checked="" type="checkbox"/>

The attendant can make entries in the notice pad and change or delete them.

These function buttons are used to select database functions for searching, changing, creating and deleting entries.



Button	Function
	Enters a new (empty) entry
	Deletes the selected entry (following a confirmation prompt).
	Editing of the selected or new entry is completed and the data is transferred to the database.
	Editing of the selected or new entry is aborted.

NOTE:

The content of the notice pad is stored in the personal profile of the logged on Windows user. By default the file "OSConcierge_Notepad.xml" is saved under C:\Users\Administrator\AppData\Roaming\Unify\OpenScape Concierge\OSConcierge.

If required a different path can be configured in Data Center / System data / advanced settings.

For details – see OpenScape Concierge, Administrator Documentation

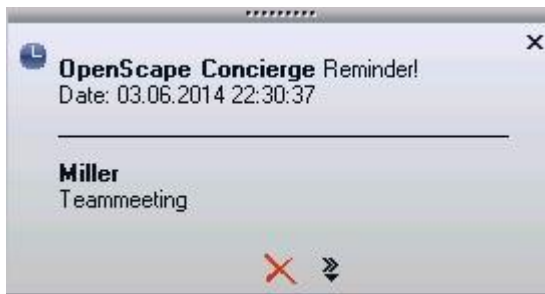
8.5.1 Reminder

When setting a Reminder the reminder is displayed in the Status bar of Concierge application at the configured time.



Details on the reminder are displayed by clicking on the reminder. The arrow opens a selection menu, such as scroll forward, if there are several error messages...

A reminder is deleted by the red



8.6 Master data

When master data of a contact (e.g. *Phone number*, *Department* or *Location*) has changed the OpenScape Concierge user can inform a competent authority about the change.

An input form that shows the current data under **Old** can be used for recording the changes to the master data and sending an e-mail to a dedicated address for updating the changes in the database.

	Old	New
Last name	Marquardt	
First name	Emma	
Salutation	Ms.	
Title		
Function	Marketing Director	
Company	ComCo	
Department	M HT WE	
Location	Berlin	
Building	HO 51	
Room	421	
Street		
Number		
ZIP code		
City		
Country		
State		
Comment		

8.7 Queues

This tab makes it possible to close or open queues as well as to change the night variant for the “close” state of a queue.

With OSCC

With OSCC only your personal queue is displayed under this tab and can be modified.

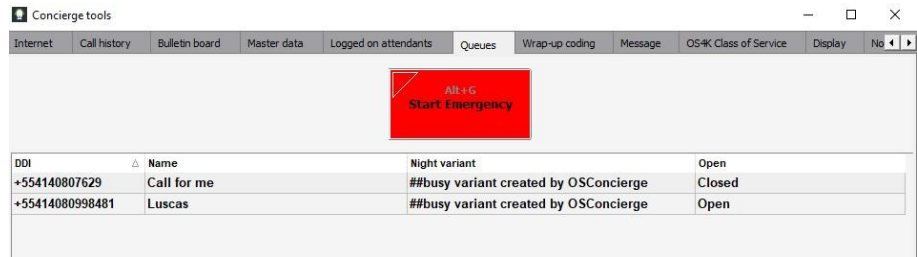
Without OSCC

You can see and change every single incoming queue from open to close and can also change the night variant for each queue.

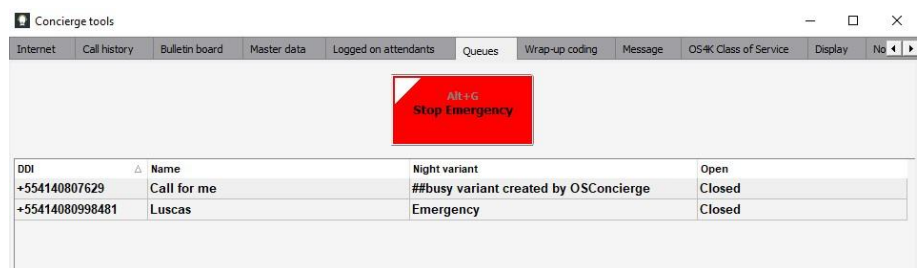
DDI	Name	Night variant	Open
+4969793098990	Switchboard	Night Operator	Closed
+496979309899280	Call for me	Voice Mail	Open

8.7.1 Emergency Button (without OSCC only)

During an emergency situation, some pre-authorized attendants may press the Emergency Button so that all calls from pre-configured queues start being transferred to a specific and pre-configured phone number.



After pressing the button, the pre-configured queues will be closed and their night variant will be exchanged for an emergency night variant. Once the queues are closed correctly, the appearance of the Emergency Button will be changed and all related queues cannot be modified until the end of the emergency situation.



When the emergency is over, one of the pre-authorized users can press the Emergency Button again to turn off the emergency state. After that, all queues that were closed will be reopened and their night variants will revert to their original state.

Hint for Administrators:

The queues that will be part of the Emergency Line as well as the users that will be allowed to use the Emergency Button must be configured in the Data Center in the following locations:

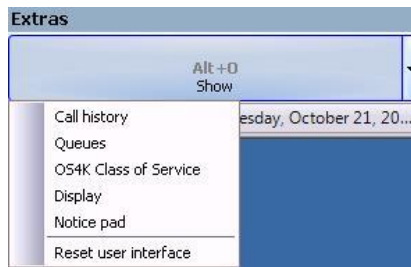
1. The Emergency Line and Emergency Night Variant name can be configured in Data Center / System data / Tenant.
2. The queues that will be closed during an emergency can be configured in Data Center / System data / DDI Lookup.
3. And the users who will be authorized to press the button can be configured in Data Center / User Administration / Accounts.

The configurations can be defined per Tenant.

For details see OpenScope Concierge, Administrator Documentation

8.8 Reset User Interface

The geometry of the Concierge GUI can be reset to Default by choosing the option "Reset user interface" in the Drop down Menu of the **Show** Button.



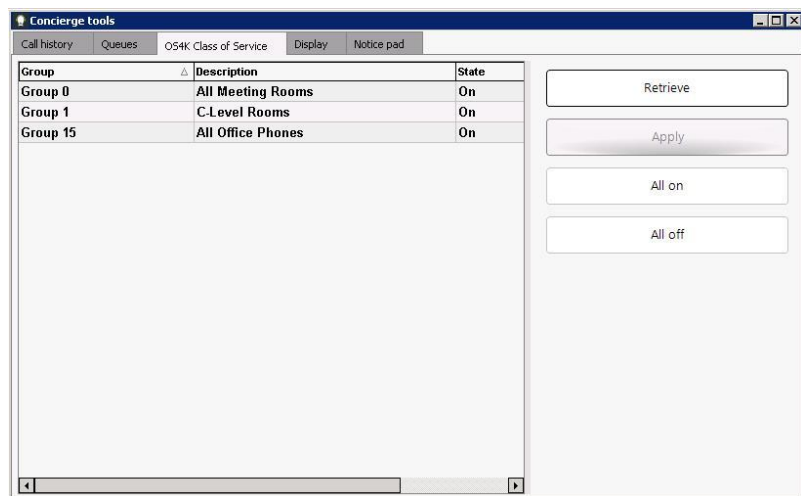
8.9 OS4K Class of Services (for OpenScape4000 only)

All phones on an OS4K System are assigned to two (2) Classes of Service (COS) which describe a set of features which are allowed to use. Multiple Phones were assigned to a Group of users like “Meeting Rooms”

The COS is mostly be used to control the access of an outside line. The attendant has the possibility to switch between the two COS. It’s working like a pointer for the operation of the phone during the day and outside the office hours.

Procedure

1. Choose the selection “OS4K Class of Service” in the drop down menu of the **Extras/Show** button
2. Following sub-window opens.



On the left hand side, the configured COS-Groups, a description as well as the latest status of all configured groups is displayed.

3. By clicking on “**Retrieve**” the latest status on OS4K can manually be retrieved.

4. **ALL** Groups can be switched **ON** or **OFF** by clicking on “All on” or “All off”
5. A **single** Group has to be selected, changed to “ON” or “OFF” followed by clicking on “Apply”

Hint for Administrators:

COS, COS-Groups as well as assignments of phones to COS and Group has to be configured in the OS4K System.

The appearance in the Concierge GUI with assigned names has to be configured in Data Center / Client Configuration / OS4K Class of Service.

The configuration can be defined per Tenant.

For details see OpenScape Concierge, Administrator Documentation

8.10 Display

The section display allows the attendant to modify the display of the Concierge GUI.

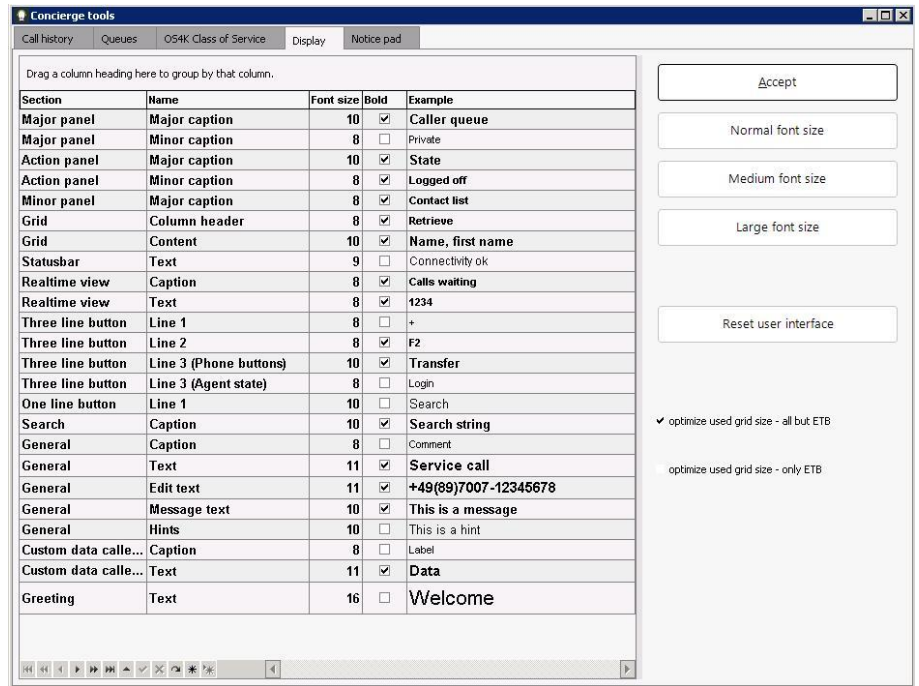
Three pre-defined font sets are available:

- Normal
- Medium
- Large

Additionally a list of the most important GUI Elements is available for individual adjustment of Font size and bold presentation.

Procedure

1. Choose the selection “Display” in the drop down menu of the **Extras/Show** button
2. Following Sub-Window opens.



- On the left hand side is the list with each changeable element. Each listed element allows changing Font size as well if the text should be presented in bold characters.
- Select the desired element, change the value and press "Accept"
- The changes will be active immediately!
- Otherwise select a pre-defined Set of fonts by selecting "Normal", "Medium" or "Large" Font size.
- The checkboxes for "optimized User Grid – "only ETB" – "all but ETB" are taking care that the Grid is working largely without a scroll bar.
- Reset user interface is the same function as described in section 8.8 Reset User Interface

Using Medium or Large Font size requires a higher screen resolution!
In certain circumstances another Monitor / Graphic adapter is required.

NOTE:

Suggested method in case GUI needs to be adjusted and secured against unforeseen changes by a Concierge User.

- Allow in User configuration the permission to change the Font Size
- Adjust the settings as desired in Concierge GUI
- Transfer the settings in Data Center / Client configuration / Layout
- Withdraw the permission in User configuration

Hint for Administrators:

The allowance to use this feature has to be configured in Data Center / User-Configuration.

All the individual settings can be pre-defined in Data Center and will be loaded on startup of Concierge.

For details see OpenScape Concierge, Administrator Documentation

8.11 Post-processing (with OSCC only)

This section only applies for installations with OpenScape Contact Center.

OSCC supports the **Post-processing** function. This function is used to statistically evaluate the activities relating to a call. To ensure that users can perform this task without being disturbed, no further calls are put through to them during post-processing.

All configuration settings that relate to this function must be created in the OpenScape Contact Center. These are, for example:

- Switching the function on/off
- Defining the post-processing reasons that are made available for selection
- Time interval available for post-processing following a call

Important NOTE:

The beginning of Post-processing state and time differs to earlier OpenScape Concierge versions. Now the Post-processing state and time start as soon as a call is taken over by the Concierge Provider Service – for example as soon as a consult call or the transfer is initiated.

8.11.1 Setting post-processing

Post-processing can be handled during a call or directly after a call. The time interval for post-processing after a call can be set in the OpenScape Contact Center Manager.

Procedure

1. On the telephone control bar, click on **Set**.
The button labels on the telephone control bar change to yellow and the **Post-processing reason** tab opens in the **Extras** window of the Electronic Telephone Book. The tab is dynamic, so it will only appear if Processing is set by the button **Set**.




2. Select a post-processing reason from the selection list.
The post-processing reasons available for selection can be configured in the OpenScape Contact Center Manager and reloaded for every call.

Selected	Text	Description
<input type="checkbox"/>	Contract	Sign the contract
<input type="checkbox"/>	Form	Complete the form

3. Click on “Save” **Set post-processing reason**
4. The selected post-processing reason is stored and marked in the **Selected** column with the check mark.

Hint: Selecting the Post-processing reason by clicking on the Check-Box is automatically setting the Post-processing reason in OSCC.

It is not mandatory to click on the icon  Set post-processing reason

8.11.2 Ending post-processing

Calls cannot be routed to users until they have ended post-processing. A flashing element at the top left corner of the **Post-proc. - Stop** button reminds you to end post-processing.

If a post-processing reason was set manually during a call, the time interval for post-processing is not limited. Post-processing must be ended by the user. The **post-processing reason** can be changed again via button **Set**.



If no post-processing reason was set manually during a call, the time interval for post-processing ends automatically. The user can stop post-processing at an earlier time.

Procedure

On the telephone control bar, click on **Stop**.
Post-processing is stopped.



8.12 Wrap-up coding

If calls have to be classified like “Transfer not successful” etc. these kind of calls can be marked with a Wrap-Up Code. The selected code-information is stored with the caller data in the OpenScape Concierge database.

Without OSCC

The selectable reasons are provided in Concierge Language File.

Procedure

E.g. In case you could not complete a transfer, click on the reason followed by the **Save** button.

The screenshot shows the 'Concierge tools' application window. The 'Call not placed because' section on the left has a list of reasons: ☒ Busy, ☐ Disturbance, ☐ Absent, ☐ No representative, ☐ Voice announcement, and ☐ No results from keyword search. On the right, the 'Destination' field is empty with a 'Refresh' button. The 'Destination number' is '+49 (221) 752100-7881'. The 'Department' is 'Finance' and the 'Location' is 'New York'. The 'Comment' field contains 'Permanent busy!'. A 'Save' button is at the bottom right.

With OSCC

The call classification reasons from OSCC are displayed. It is used for statistical purposes. The information is stored with the caller data in the OpenScape Concierge database.

Procedure

Choose a call classification reason and save your choice with “Save”, you can also click “Available after saving”, if required.

The screenshot shows the 'Concierge tools' application window. The 'Call classification' section has a 'Save' button and an 'Available after saving' checkbox. Below is a table with call classification reasons:

Selected	Text	Description
<input type="checkbox"/>	Card lost	Customer lost identity card
<input type="checkbox"/>	PIN lost	Customer lost pin

NOTE

Mandatory wrap-up is not supported by Concierge. When configured, it only results in a pop-up of the wrap-up coding tab.

8.13 E-mail and SMS

When a caller would like to leave a message for a contact, the attendant has the option of sending an e-mail message or a SMS to the unavailable contact.

You can either enter this section by clicking on the E-mail or SMS button of the Concierge main application:

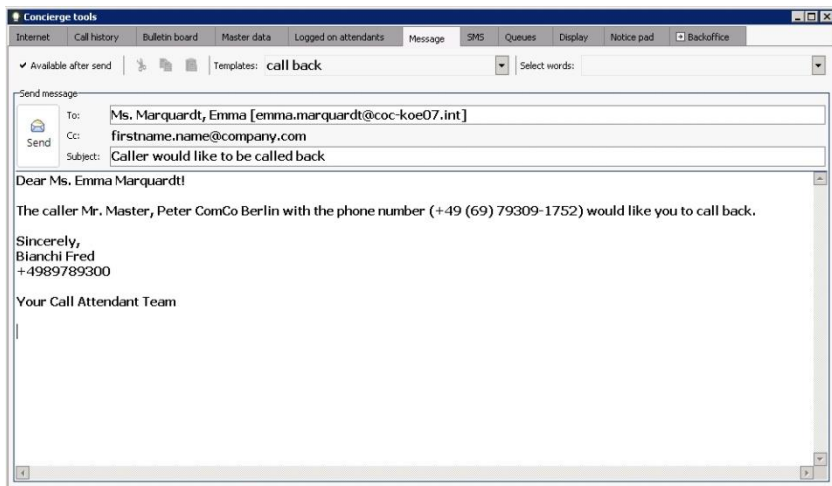
The screenshot shows the 'Messages' section of the Concierge main application. It contains two buttons: 'Alt+F9 E-mail' and 'Alt+F10 SMS'.

Or using the according tab under Concierge Tools, opened with button **Show** (section **Extras**).

Hint:

If you have falsely select the wrong contact person you can easily reload the template data by selecting the suitable contact person and clicking again on the E-Mail button.

Changing from the Template window to the main window and back again will keep the template data.

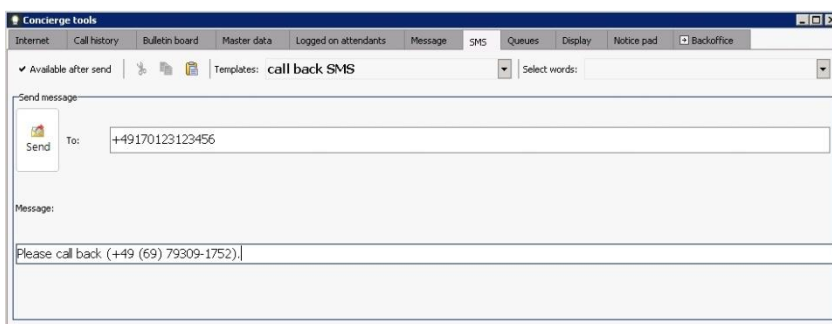
Message

Prepared templates are available to comfortably send e-mails.

The prerequisites for sending e-mails must be fulfilled.

NOTE

If the user receives a call while typing an email, the email will be put in the background for the user to answer the call (calls have higher priority). In a situation where the user needs to recover the email he was working on, he will need to minimize the Concierge window, but not completely, that is, he will have to click on the Restore Down button.

SMS

Prepared templates are available to comfortably send SMS.

NOTE for Administrators:

Sending an SMS is implemented via a mail interface connecting to Xpressions. Xpressions supports the current interface to the SMS provider. Xpressions is required for the use of SMS.

8.13.1 Send message (E-mail and SMS)

Using templates

Templates are defined in **OSConcierge_Templates.txt** file. This file is available in the languages German, English, French, Spanish, Italian and Portuguese-Brazilian.

Procedure

1. Open the **Message** or the **SMS** tab.
2. Select a template from the **Templates** selection list.
The message is filled with data from a selectable template.
Various parameters are available for adoption, such as the caller's phone number and name and the e-mail address of the selected contact, provided that it is stored in the contact list.
If configured, the name and phone number of the attendant is added to the e-mail.
3. Optionally, you can add selectable text blocks to the message. Select a text block from the **Select words** selection list.
4. You can add a personal text to the message.
5. Click on **Send** to send the message.

NOTE:

Changing to another tab sheet during writing an e-mail does not reset the written text. A newly selected member during writing the e-mail changes the recipient if the **Message** tab sheet is activated again.

If a new call is answered during writing the e-mail (i.e. direct call), you have to send the e-mail before you change any tab sheet. Otherwise, the e-mail change will be lost.

8.14 Direct dial and speed dial

Direct dial buttons and speed buttons simplify the transfer of calls. Numerous functions are available for a button. Calls can be transferred, either with consulting or directly, call pickup is possible, the stored phone number can be dialed or an e-mail can be send to configured e-mail address.

Configuration

Configuration options for direct dial buttons:

- Up to 6 tabs are available for direct dial buttons. The number of lines and columns can be set in the configuration of the direct dial pages and control buttons.
- For frequently used direct dial buttons you can create permanently visible speed buttons. Up to 20 Speed Buttons are possible. If the space is not sufficient in the destination area it will automatically enhanced to display all configured speed buttons.
- You can additionally configure a state function for all buttons to show phone and user presence for direct dial and speed buttons.



Hint for Administrators:









Configuration of direct dial and speed buttons are performed in Concierge Data Center under Basic data / Button configuration or in Concierge client under Extras / Direct dial button configuration, in case “Edit” permissions are set in the User configuration and a Button configuration is assigned.

For details see OpenScope Concierge, Administrator Documentation

Status

The status of the configured connection can be displayed for each direct dial/speed dial button. This is only possible for internal connections of the telephone system or of systems in the overall network.

Table: Telephone state

Symbol	Function
	The connection is idle
	The connection is busy
	The connection is out of service
	The connection is ringing and call pickup is possible
	The connection is ringing and call pickup is not possible
	The connection cannot be monitored because for example the phone number was not stored correctly.
	Monitoring error – Monitoring point not correct configured or no valid license.
	The connection has an activated Call Forwarding

The number of busy lamps is limited by the number of licenses available for monitoring connections.

For UC, Circuit, Skype, or Microsoft Teams Integration only

Additionally, it is possible to display the UC, Circuit, Skype or Microsoft Teams or Unify Office presence status of the monitored device.



Hint of Administrators:





Requirement for displaying this status is an appropriate Node configured in the System Management

For installations with UC integration

The UC state set by the contact is displayed. The attendant can change the UC state.

The following UC states are available:







Icon	State
	Unknown
	Offline

Icon	State
	Busy
	Away
	Do not disturb
	Available

For installations with Circuit integration

The Circuit state set by the contact is displayed. The attendant **cannot** change the Circuit state.













The following Circuit states are available:

Icon	State
	Unknown
	Offline
	Circuit call
	Away
	Do not disturb
	Online

For installations with Skype integration

The Skype state set by the contact is displayed. The attendant **cannot** change the Skype state.

The following Skype states are available



Icon	State
	Offline
	In a meeting
	Busy
	In a conference call
	In a presentation
	Be right back
	Away
	Do not disturb
	Off work
	Out of office
	Out of office (Auto answ.)
	Online





For installations with Microsoft Teams integration

The Microsoft Teams presence state set by the contact is displayed.

NOTE: The attendant cannot change the Microsoft Teams presence state using the concierge client.

The following Teams states are available:

Icon	State
	Unknown
	Offline






Icon	State
	Busy
	Away
	Do not disturb
	Online

For installations with Unify Office integration

The Unify Office presence state set by the contact is displayed.

NOTE: The attendant cannot change the Unify Office presence state using the concierge client.

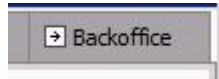
The following Unify Office states are available:

Icon	State
	Unknown
	Offline
	Busy
	Do not disturb
	Online

8.14.1 Direct dial buttons as separate window

Each direct dial tab can be detached from the Concierge window as a separate window.

This is performed using the arrow next to the **Direct dial** tab.



The display has the following appearance:



The detached view can be recombined by simply closing the separate window.

8.14.2 Functions of the buttons

The buttons are pre-assigned with one of the functions. A different function can be selected with the drop down arrow on the right side of the button.



When the own extension is idle, the stored phone number is adopted as the destination in the destination field and is dialed.

Functions

When busy, the following functions are available:

- "free" transfers the phone number to the destination field
- The "blind transfer" selection transfers the call via direct transfer
- The "comfort transfer" selection results in a consultation with the selected contact.
- With "e-mail" the contact's e-mail address is transferred to the Message tab. Prerequisite is, that an e-mail address is configured in this direct dial or speed button for that contact.
- With "call pickup", the call can be accepted from the contact.

Tool tip

Depending on the state of the extension, certain information is displayed in a tool tip. For example, the full name is visible when idle.

When the phone is ringing, the caller phone number and any other contact data are visible.

8.14.3 Direct dial and speed buttons shortcut in main window

In the main window a shortcut button per direct dial tab can be used. This is located underneath the Calendar:



The speed dial buttons are a subset of the direct dial buttons. The view differs in that it has limited labeling options.



9 Telephony control



The telephony is controlled with the buttons in the **Destination** panel and the buttons under **Call functions** just above the ETB. All buttons can also be executed using keys or key combinations (hotkeys) on the keyboard. Which hotkey is associated with which button depends on the configuration of OpenScape Concierge and is displayed on the buttons.

Impact on blind workstations

For example: + and – on the buttons are used in blind script to identify LEDs.

9.1 Telephony control in the Destination panel

Table: Dial and Consult buttons

Button	Function
	Initiates an outbound call and offers option to override DND and CDW
	Consult transfer is used if you want to talk to the contact before transferring the caller to this contact. Offers additionally the Option to override DND and CFW NOTE: Consult works only with Concierge attendant console. DO NOT USE your agent phone!

9.2 Call functions

The **Call functions** are controlled through a selection of buttons.

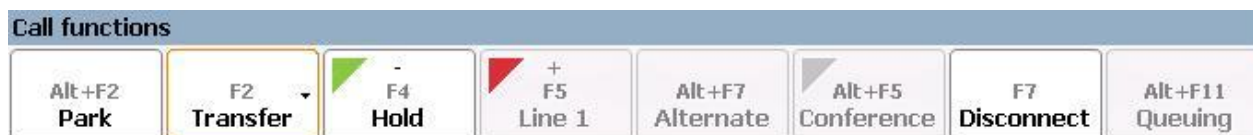


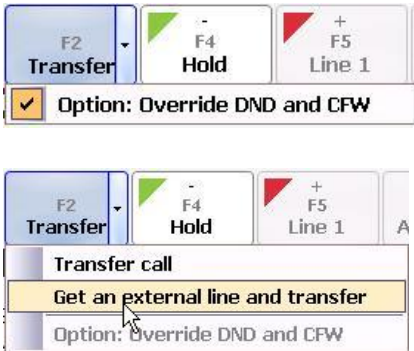










Table: Call functions

Button	Function
	Using the Park button, a caller can be parked in the Processing queue if, for example, the caller wishes to wait for the destination contact that is currently talking on the phone.

Button	Function
 	<p>For „blind transfer“ you can use the Transfer button. The caller is placed automatically into the Processing queue first so that the caller hears the Processing queue music on hold while waiting for the contact to answer the phone.</p> <p>If the destination contact is already talking on the phone (connection busy), the caller will be the next to be connected to the contact when the connection becomes free.</p> <p>Multiple scenarios are possible when the contact does not answer the call:</p> <ul style="list-style-type: none"> Retrieve the call from the Processing queue and find another way to handle it. Edit the destination number and try to transfer the call to the new destination– the caller stays in the Processing queue uninterrupted. <p>For detailed information see section 4.3 Processing queue</p> <hr/> <p>NOTE: Transfer only works with Concierge attendant console. DO NOT USE your agent phone!</p> <hr/> <p>Selectable optional Feature in drop down menu</p> <p>Override DND and CFW</p> <p>If the desired contact has an activated CFW or DND feature it is possible to override this setting.</p> <p>Get an external line and transfer</p> <p>For detailed information see section 4.2.2.2 New Transfer Process.</p>
 	<p>Puts the active call on hold. The caller hears music. The button changes to Retrieve in order to retrieve the caller from the hold situation.</p> <hr/> <p>NOTE: Hold only works with Concierge attendant console. DO NOT USE your agent phone!</p>
 	<p>Call pickup on line 1. A pending call is indicated by a flashing LED. When a call is accepted, the button changes from green to red.</p>
	<p>Toggle between line one and consultation = Alternate.</p>

Button	Function
	Enables a 3-party-conference. A new participant is dialed and then connected to an existing connection via the conference button.
	Disconnects the active call.
	Only <u>without</u> OSCC: Re-queues the call ringing at the Concierge attendant console to the Caller queue

IMPORTANT Note:

Consult, Hold and Transfer will only work with Concierge attendant console. DO NOT USE your agent phone!

9.2.1 For OS4000 integrations only

Within an OS 4000 integration environment please be aware of this restriction for consultation:

Example: A caller talks to an employee within your company. This employee is not the suitable contact and wants help from the switchboard to transfer the caller to the suitable person or department.

The employee starts a consultation call to Concierge. Now, the employee has to transfer the caller to you. Only if you have the original caller connected to you, you have the complete Concierge functionalities again to handle the call appropriately.

















A hint above the call buttons draws your attention to such a situation.











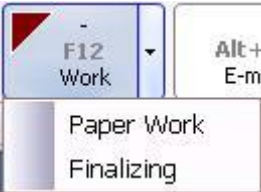

9.3 Routing State

The routing state functions with the descriptions are listed here.

Table: State

Button	Function								
<div> </div>	<p>The user logs on to the OpenScape Concierge using the Login button. The current state is displayed on the button.</p> <p>The Logoff button is used to log off before closing the OpenScape Concierge application. Direct calls depend on the state.</p> <p>The user must be logged on to view the current calls in the Caller queue.</p>								
<div> </div>	<p>Clicking on the Available button (red LED) switches the user to available. The button changes from red to green. Green LED = <i>Available</i> state</p> <p>The current state is displayed on the buttons.</p> <div><table><tr><th colspan="2">State</th><th colspan="2"><i>Available</i></th></tr><tr><td></td><td></td><td></td><td></td></tr></table></div> <p>If another state button is activated (Unavailable or Work), the LED on the button changes to red.</p> <hr/> <p>NOTE: The agent only receives calls via automatic call distribution if the agent is in the <i>Available</i> state.</p> <hr/>	State		<i>Available</i>					
State		<i>Available</i>							
									

Button	Function
 	<p>Pressing the Unavailable button (red LED) switches the user to the <i>Unavailable</i> state. The button changes from red to green.</p> <p>Green LED = <i>Unavailable</i> state</p> <p>The current state is displayed on the buttons.</p>  <p>If another state button is activated (Available or Work), the LED on the button changes to red.</p> <p>Unavailable with Reason Code</p> <p>If Unavailable Reasons are configured in OpenScape Contact Center they can be selected within the Drop Down Menu of the Unavailable Button.</p>  <p>The selected reason will be displayed in the panel above.</p> 

Button	Function
 	<p>Pressing the Work button (red LED) switches the user to the <i>Work</i> state. The button changes from red to green. Green LED = <i>Work</i> state The current state is displayed on the buttons.</p> <p>State <i>Work</i></p>  <p>If another state button is activated (Available or Unavailable), the LED on the button changes to red.</p> <p>Work State with Reason Code</p> <p>If Work Reasons are configured in OpenScape Contact Center they can be selected within the Drop Down Menu of the Work Button.</p>  <p>The selected reason will be displayed in the panel above.</p> <p>State <i>AW: Paper Work</i></p> 

Hint for Administrators:

The usage of Unavailable and / or Work reasons have to be configured in Data Center / Client Configuration.

For details see OpenScape Concierge, Administrator Documentation

9.4 E-mail and SMS

When a caller would like to leave a message for a contact, the attendant has the option of sending an e-mail message or a SMS to the unavailable contact.




Table: Messages

	Function
E-mail	The Message button is displayed in the <i>E-mail</i> state. Prepared templates are available to comfortably send e-mails. The prerequisites for sending e-mails must be fulfilled.
SMS	<div>The SMS button is displayed in the <i>SMS</i> state. Prepared templates are available to comfortably send SMS.</div> <hr/> <div>NOTE: Sending an SMS is implemented via an interface connecting to Xpressions. Xpressions supports the current interface to the SMS provider. Xpressions is required for the use of SMS.</div> <hr/>

For further information on E-mail and SMS see section 8.13 E-mail and SMS.


9.5 Alarm Button

The Concierge alarm button is provided for emergency situations.

Button	Function
	The Alarm F1 button is used for threatening calls. If the user presses the Alarm F1 button during a call, an e-mail with the data of the call and user is generated and sent to the e-mail address configured in Concierge DataCenter under System data /client configuration / Default / Alarm E-mail to escalate the emergency situation.

9.6 Malicious Call Identification (MCID) - with OS4K only

The MCID button is used in malicious call situations.

Button	Function
	By pressing the MCID button the OS4K Switch will collect and store call data information for further investigations.

Hint:

The MCID function is only supported in Openscape 4000 (V7R2 or higher) Switch environments.

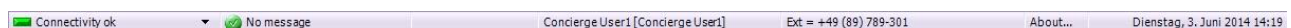
This feature has to be enabled in Concierge Data Center under System data / client configuration / Layout.

For details see OpenScape Concierge, Administrator Documentation

10 Status bar

The following information is displayed on the status bar:

- Connectivity status
- Error, Warning and Information messages
- Information from the notice pad
- Logged on attendant
- Extension
- About...
- Date, time



10.1.1 Connectivity server status

The **Connectivity** display in the status bar shows you the overall status of server connections.



- GREEN = Connectivity ok = all servers connected
- YELLOW = No connection to a non-critical server, OS Concierge is “working”
- RED = No connection or server not active

In case **Connectivity** shows red or yellow, you should check the list of servers first, then you can view the exact error message by clicking on the Error button.

NOTE:

In case Concierge lost its functionalities and this situation is not resolved after a few minutes, try to log off and restart the application again.

Server component state

The **Connectivity** drop-down menu shows the status of the connection of OpenScape Concierge to the various servers. The connections shown depend on the OpenScape Concierge environment.



Click on the selection triangle to view the server component states.

Table: Possible server connections/configurations:

Field	Description
DB	Database
PABX Connector	PabxLink Connector
OSCC	For OSCC only: OSCC (config. + connect.)
PABX Node	PABXLink Server
RT	Real Time Server
ECS	External calendar server (config. + connect.)
UC, Circuit, Skype or Microsoft Teams	UC, Circuit, Skype or Microsoft Teams or Unify Office node (config. + connect.)

Field	Description
CPS	Concierge Provider Service (config. + connect.)
CPS Worker	Concierge Provider Service Worker (additional functions)

Table: Status displays

	Ok – connection and configuration
	Error – connection and/or configuration

10.1.1.1 Error





When an error occurs, a brief error message notifies the attendant, the Connectivity status display is yellow or red and the title bar of the telephone buttons correspondingly displays in red that Connectivity is not ok!



To see the error message again and also old error and information messages you have to click on the message field next to the status field (i.e. An error has occurred!).

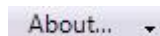
The following figure shows an example:



The red  can be used to delete the error message. With the arrows  selection menu you can either close this message and if there are several error messages, you can scroll forward to the next message or delete all existing messages.

When exiting OS Concierge all error and information messages are automatically deleted for this attendant console.

10.1.1.2 About Dialog



By clicking on the triangle you can select “About” or “Check for Updates”



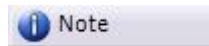
“About” provides information about Program and File version.

“Check for Updates” provides the possibility for checking and if available to install a new Concierge Client version

Hint:

“Check for update” is only selectable in Routing State “Logoff” or “Not Available” and without having an active call.

10.1.1.3 Note



Error, Warning and Information messages are immediately displayed for a short time when they occur. This info window does not block Concierge usage. Current tasks do not have to be interrupted.

The message can be shown for a different amount of time and then closed automatically according to the message category. The messages remain available until they are deleted or Concierge is closed.

The message window can also be retrieved actively by clicking on the status bar like done with Errors. This allows users to take the time to read messages and then close them.

10.1.1.4 Information from the notice pad

Reminders

Reminders are set at the **Notice pad** tab. Details can be found in section 8.5 Notice pad. If the reminder is current, it is displayed as follows.



Details on the reminder are displayed by clicking on the reminder. The arrow opens a selection menu, such as scroll forward, if there are several error

messages...

A reminder is deleted by the red



11 Sound

Signaling events with different tones can be advantageous for everyone, not only to people with a visual impairment. Whether or not a sound should be activated at all, which sound should be played, and which sound file should be played for which event, is configured in Concierge DataCenter under System data/Client Configuration/Basic/Standard/Sound.

A sound file can be configured for the following events:

- Exceeded threshold value - if the number of calls in the queue is exceeded (By default, if one or more calls are in the Caller queue) provided that the attendant is logged on and not in a call.
- Call is delivered
- Call is established
- Call is released
- Call is transferred I

Tones (short sounds) can be played for the following actions:

- Parking a call
- Change forwarding of a destination number
- Holding a call
- Line button 1
- Consulting
- Initiating a conference
- Disconnecting a call
- Dialing
- Transfer button
- Alternate
- Alarm
- Agent logon
- Agent logoff
- Available
- Unavailable
- Work
- Database search
- Pressing the speed button
- Pressing the direct dial button
- Pressing the cancel button
- Pressing the e-mail button

- Pressing the SMS button
- Confirming the logon window with a logon
- Pressing the cancel button in the logon window

NOTE:

The sound quality depends on the operating system. Older operating systems generate sounds in an integrated sound generator. As of Windows 7, sounds are created on a sound card. The acoustic quality differs markedly.

12 OpenScape Concierge hotkeys

In OpenScape Concierge, many functions can be accessed using hotkeys that are defined for each language in the **OSConcierge_Lang.nn.ini** file (nn = de, en, fr, es, it or pt-br).

These could be individually adapted in the **OSConcierge_Lang.Custom.en.ini** file according to customer requirements. After the adaptations, OpenScape Concierge must be restarted.

NOTE:

Ensure that each hotkey is only used once per language. Do not use Ctrl+Shift+ 0 to 9 and Ctrl+Shift+A to Z as it is reserved for Direct Dial Buttons.

NOTE for Concierge Plus:

The list of Hotkeys is based on the Concierge Professional version – therefore there might be some keys listed not available with Concierge Plus.

Button Control Hotkeys

Description	Hotkey	Parameter
Hotkey Accept Call Line 1	F5	ButtonHotkeysLine1_2
Hotkey Alarm	F1	ButtonHotkeysAlarm3
Hotkey Available	F10	ButtonHotkeysAvail2
Hotkey Conference	Alt+F5	ButtonHotkeysConference2
Hotkey Consult	F6	ButtonHotkeysLine2_2
Hotkey Dial	F8	ButtonHotkeysDial2
Hotkey Disconnect	F7	ButtonHotkeysDisconnect2
Hotkey Hold / Retrieve	F4	ButtonHotkeysHold2
Hotkey Logon / Logoff	F9	ButtonHotkeysLogonLogoff2
Hotkey Message E-mail	Alt+F9	ButtonHotkeysEMail2
Hotkey Message SMS	Alt+F10	ButtonHotkeysSms2
Hotkey Park	Alt+F2	ButtonHotkeysPark2
Hotkey Post-processing activate	Alt+F8	ButtonHotkeysPostProcSet2
Hotkey Post-processing end	Alt+F4	ButtonHotkeysPostProcStop2
Hotkey Toggle	Alt+F7	ButtonHotkeysMakeIn2
Hotkey Transfer	F2	ButtonHotkeysFastConnect2
Hotkey Xfer Grps	Alt+F6	ButtonHotkeysTransfer2
Hotkey Unavailable	F11	ButtonHotkeysUnavail2
Hotkey Work	F12	ButtonHotkeysAfterwork2

TabSheet Activation

Description	Hotkey	Parameter
Activate Blackboard tab	Ctrl+Alt+B	TabSheetETBBlackboard
Activate Call History tab	Ctrl+Alt+H	TabSheetETBStatistics
Activate Details tab	Ctrl+Alt+D	TabSheetETBDetails
Activate Direct Dial 1 tab	Ctrl+1	TabSheetETBDirectdial1
Activate Direct Dial 2 tab	Ctrl+2	TabSheetETBDirectdial2
Activate Direct Dial 3 tab	Ctrl+3	TabSheetETBDirectdial3
Activate Direct Dial 4 tab	Ctrl+4	TabSheetETBDirectdial4
Activate Direct Dial 5 tab	Ctrl+5	TabSheetETBDirectdial5
Activate Direct Dial 6 tab	Ctrl+6	TabSheetETBDirectdial6
Activate Internet tab	Ctrl+Alt+I	TabSheetETBInternet
Activate Logged On Attendants tab	Ctrl+Alt+A	TabSheetETBAgents
Activate Master Data tab	Ctrl+Alt+Q	TabSheetETBMasterdata
Activate Message tab	Ctrl+Alt+M	TabSheetETBMessage
Activate Notice pad tab	Ctrl+Alt+N	TabSheetETBNotes
Activate the Pager tab	Alt+F1	ActionPagerActivate
Activate Post-processing tab	Ctrl+Alt+F8	TabSheetETBPostProcessingReasons
Activate SMS tab	Ctrl+Alt+X	TabSheetETBSms
Activate Work tab	Ctrl+Alt+K	TabSheetETBAfterwork

Electronic Telephone Book Control

Description	Hotkey	Parameter
Adopt value of selected table line into the current search field	Ctrl+F10	ActionETBGetGridValue
Change to the next hierarchical display	Ctrl+F9	ButtonETBSearchHierarchy
Electronic Telephone Book - highlight the panel	Ctrl+Alt+Y	PanelETB
Enable/disable fast search	Alt+H	CheckBoxETBSearchFast
Focus on Contact List	Ctrl+T	PanelETBSearchDetailsAvailibilitiesHotKey
Focus on field "Building"	Alt+B	EditETBSearchBuilding
Focus on field "Company"	Alt+Y	EditETBSearchCompany
Focus on field "Department"	Alt+T	EditETBSearchDepartment
Focus on field "Fax"	Alt+X	EditETBSearchFax
Focus on field "First name"	Alt+F	EditETBSearchFirstname

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Description	Hotkey	Parameter
Focus on field "Free text"	Alt+S	EditETBSearchFreeText
Focus on field "Function"	Alt+U	EditETBSearchFunction
Focus on field "Keyword"	Alt+W	EditETBSearchKeyword
Focus on field "Location"	Alt+L	EditETBSearchLocation
Focus on field "Name"	Alt+N	EditETBSearchName
Focus on field "Room"	Alt+M	EditETBSearchRoom
Focus on field "Salutation" (Mr.;Mrs)	Alt+Z	ComboboxETBSearchSalutation
Focus on field "Secretary"	Alt+E	EditETBSearchSecretary
Focus on field "Telephone"	Alt+P	EditETBSearchTelephone
Focus on field "Title"	Alt+I	EditETBSearchTitle
Focus on Status Destination	Ctrl+U	GridETBMemberMonitorHotKey
Highlight the list box if Work is active	Ctrl+L	CheckBoxETBAfterwork
Initiate reset (of search fields)	Alt+R	ButtonETBSearchReset
Minimize/maximize the search table	Ctrl+F7	ButtonETBMinMax
Show/hide advanced search fields	Ctrl+F12	ButtonETBSearchExtend
Start Search	Ctrl +S	ButtonETBSearchSearch

Other Hotkeys

Description	Hotkey	Parameter
Button Get Call from Caller Queue. Getting the highlighted call from the list caller queue	Ctrl+F1	GridViewCallerBTGetBtn
Button Get Call from Processing queue. Getting the highlighted call from the list Processing queue	Ctrl+Alt+R	GridViewParkqueueGetBtn
Call History - activate Detailed view	Ctrl+W	ActionStatistikShowDetailView
Caller Queue - highlight the panel	Ctrl+Alt+F6	CallerPanel
Centering and updating the calendar	Ctrl+F4	EventsRefreshBtn
Clear Destination field	Alt +F12	ActionClearDestination
Connection Information - show/hide the details in the status bar	Ctrl+Alt+F7	ActionDetailStatusShow

Description	Hotkey	Parameter
Display and focus on list Department	Ctrl+Alt+T	ActionSelectionListDepartment
Display and focus on list Keywords	Ctrl+Alt+W	ActionSelectionListKeyword
Display and focus on list Location	Ctrl+Alt+L	ActionSelectionListLocation
Enable/disable Group Box in Caller Queue	Ctrl+Alt+G	CallerGridGroupByBox
Focus on field "Comment"	Alt+C	EditCalldataComment
Focus on field "DNIS"	Alt+D	EditCalldataDNIS
Highlight last used Destination Number	Ctrl+R	EditCalldataDNISLastNumber
Log file - Activate advanced logging into the Log file	Ctrl+Alt+F12	ActionSaveLogData
Processing queue - highlight the panel	Ctrl+F3	PanelParkqueue
Post-processing reset reason	Ctrl+Alt+F10	ActionHotKeyResetPostProcessingReason
Post-processing set reason	Ctrl+Alt+F9	ActionHotKeySetPostProcessing
Reset sorting order	Ctrl+Alt+O	ResetSortOrderCallerGridBtn
Show+Hide DTMF field	Ctrl+0	ActionShowDtmfPanel
Speed Buttons - activate the panel	Ctrl+F5	PanelETBSpeed
Start paging (Paging button) after individually recorded message	Ctrl+Alt+F1	ActionPagerActivatePagerCall
Stop sound alert for calls waiting in queue	Ctrl+Q	ActionStopSoundAlertHotkey
Work - activate the Save button if Work is active	Ctrl+E	AfterworkSaveBtn
Work - highlight the comment if Work is active	Ctrl+Alt+C	MemoETBAfterwork

13 User data and basic settings

Logon

By default, logon data is stored in the system the first time a user logs on. The next time a person logs on, the logon window contains the data of the person who logged on last on this computer. If the same person logs on, he merely needs to click on **OK**.

If these data (logon data and changes to the view) are to be cleared, simply delete the respective file or it must be configured, that this data should not be stored.

The next time a person logs on, the basic settings are restored, the logon mask is empty and the default view appears.

User data

OpenScape Concierge stores individual data for each Windows user. These include:

- Logon data
 - OSConcierge_LoginData.ini
This file contains the logon data for OpenScape Concierge.
 - OSCD_LoginData.ini
This file contains the logon data for the OpenScape DataCenter.
 - Files that contain changes to the interface
 1. This file contains the changes to the interface.
They are available to the user when he logs on again.
 - OSConcierge_FormState.ini
This file contains information such as whether the view of the processing queue or caller queue was enlarged.
 - OSConcierge_FormState_gv.ini
This file contains the changes to the column width and the order of columns in the phone book.
- Both files can be deleted to get the default view after a restart of Concierge.

Directory:

The user data are stored in the following directory (WIN7 or higher):

- <Drive>:\Users\<username>\AppData\Roaming\Unify\OpenScape Concierge\OSConcierge

