A MITEL
PRODUCT
GUIDE

OpenSape Business V3 Attendant

User Guide

User Guide

06/2024

A31003-P3030-U118-01-7619

Mitel

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History of Changes

Issue	Date	Summary
1	04/2023	First issue of the guide in the rebranded layout.
2	06/2024	Rebranded with Mitel template

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1 Introduction

With this software, you have purchased a state-of-the-art, compact PC-based attendant console for your communications platform.

Your PC must be connected to your communications platform to perform all switching functions from your PC.

There are two different options available for this depending on the installation location:

- Via IP using the LAN cable of your PC
- Via a USB cable to a system telephone on your communications platform
- A LAN connection to your telephone system is required to use a presence server

The software is compatible with various Windows operating systems. This means that you can conveniently transfer telephone calls and simultaneously run other PC applications such as Microsoft® Office programs.

This attendant console provides you with:

A variety of switching and administration functions, as well as a high degree of user-friendliness thanks to:

- A Windows-based transparent user interface
- Easy to operate using a keyboard and mouse
- Presence status of all subscribers *
- Option to set a presence status for all subscribers *
- Option to set your own presence status *
- Access to speed dial and journal directories *
- Access to voicemails *

The software requires one of the following Windows operating systems:

- Windows Vista
- Windows 7 / 8 / 10

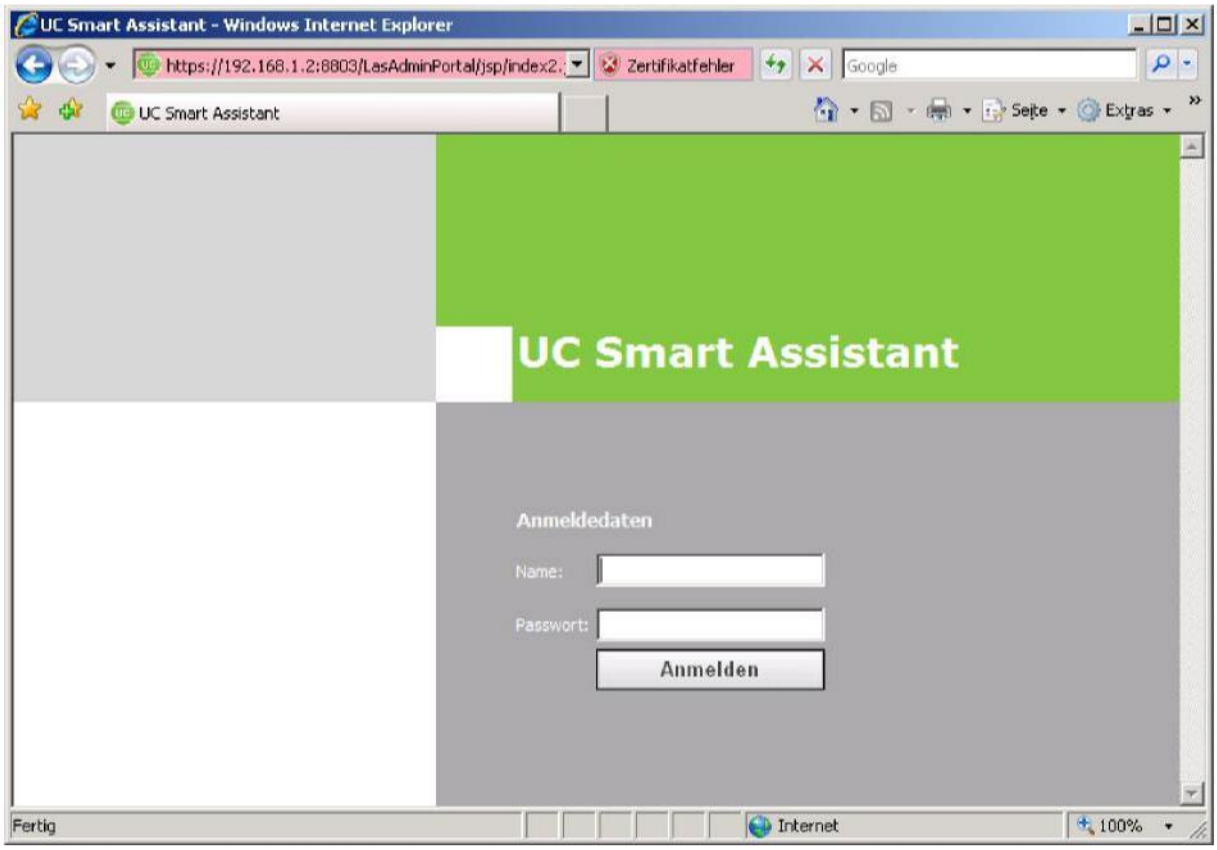
We recommend regularly checking for software updates to ensure that you are using the latest version. See also ‘Search for software updates.

*** This requires a corresponding UC licence.**

The presence server is connected using an SSL-encrypted protocol.

If you receive this error message when you are setting up the connection,

confirm with ‘OK’ and your browser automatically forwards you to the UC Smart Assistant. Install the certificate and restart the software.



2 Important Note

This documentation describes how to operate and configure the PC-based attendant console to your communications platform.

It will describe the software functions that are required for typical use. If you find that some of the functions you wish to use are not available, it may be due to one of the following reasons:

- The function has not been set up for the PC-based attendant console. In this case, contact your system support personnel.
- Your communications platform does not support this function. In this case, address any questions to the sales person responsible for upgrading your system.
- You do not have the latest version of the software. In this case, contact the sales person regarding updating your software.

The functions and procedures explained here depend on the software the system is running on and may not always be available or only available in a modified form. If you have any questions in this regard, contact your IT support for the telephone system.

The information provided in this document only contains general descriptions and features, which in case of actual use do not always apply as described, or which may change as a result of ongoing product development.

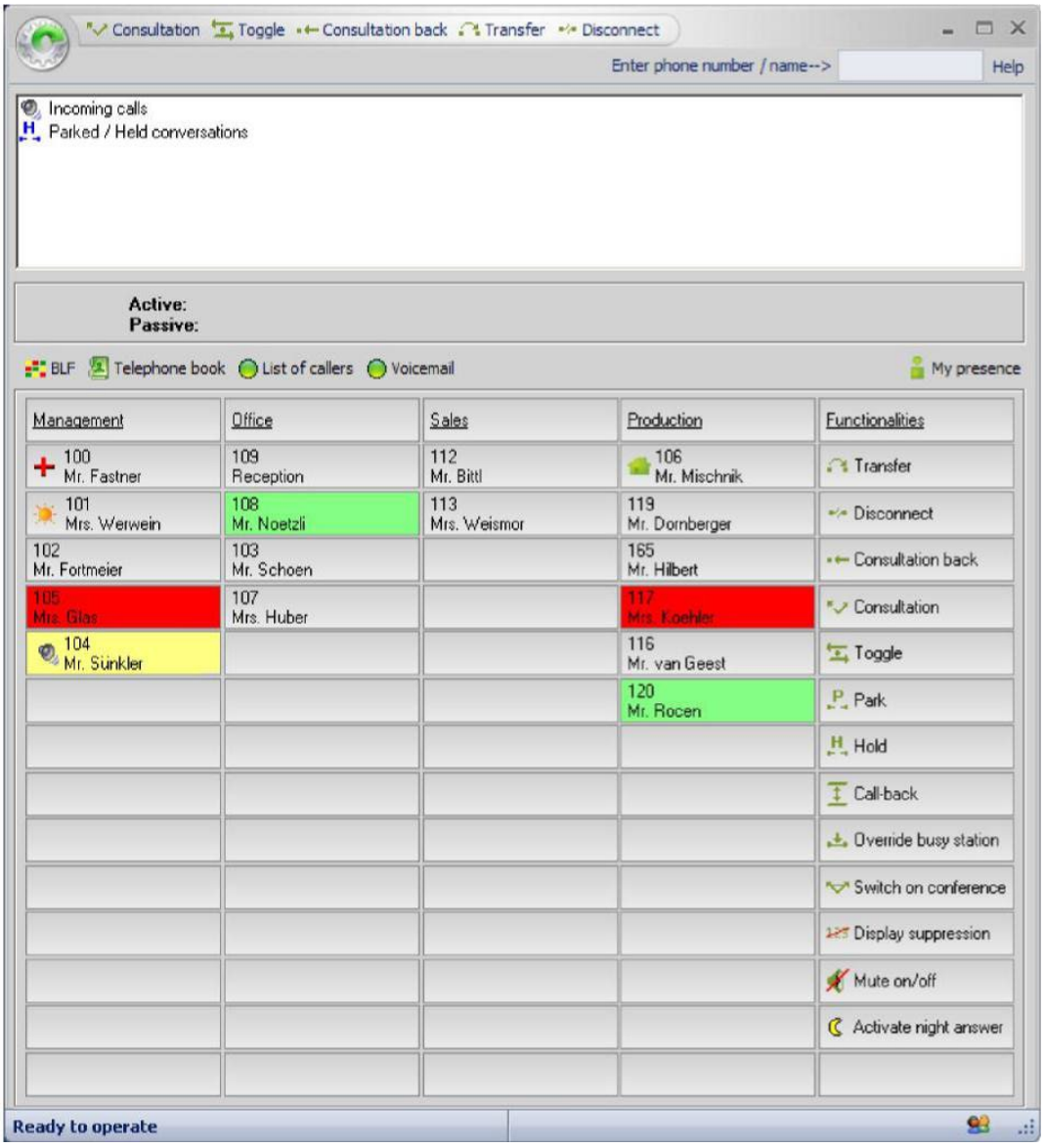
An obligation to provide the respective features shall only exist if expressly agreed in the terms of the contract.

Please also read the information in the ‘readme’ file.

3 Program Windows

3.1 The main window

The main window is the central control element of the attendant console.



You obtain information on the incoming calls, parked/held conversations, and the status of active calls at a glance.

The main window is subdivided into various information elements.

They are as follows:

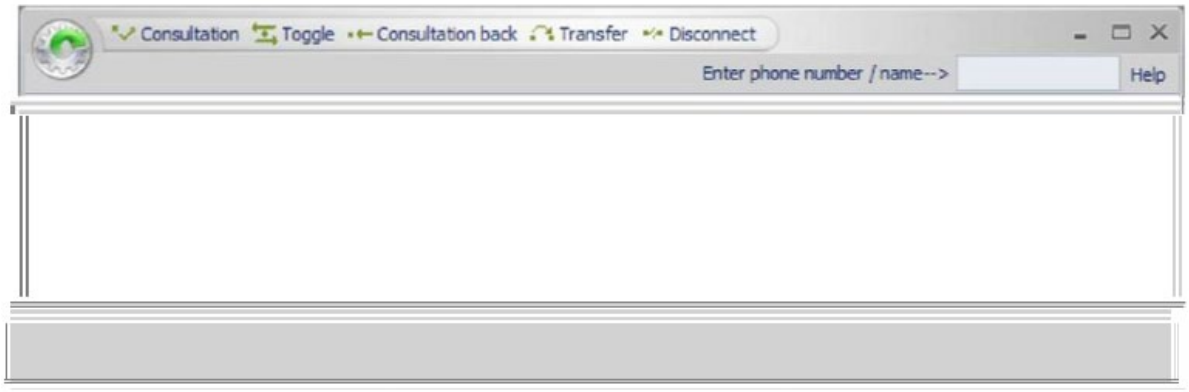
Function bar, menu bar, display for calls and parked/held calls, the busy lamp field, telephone book, list of callers *, voicemail journal * and the status display

! **Important:** * This requires a corresponding UC license

You can control important connecting functions using the main window function menu. The 'toolbar' and 'functions buttons' are also available.

The main window is divided into a window area that is always visible and one that automatically changes.

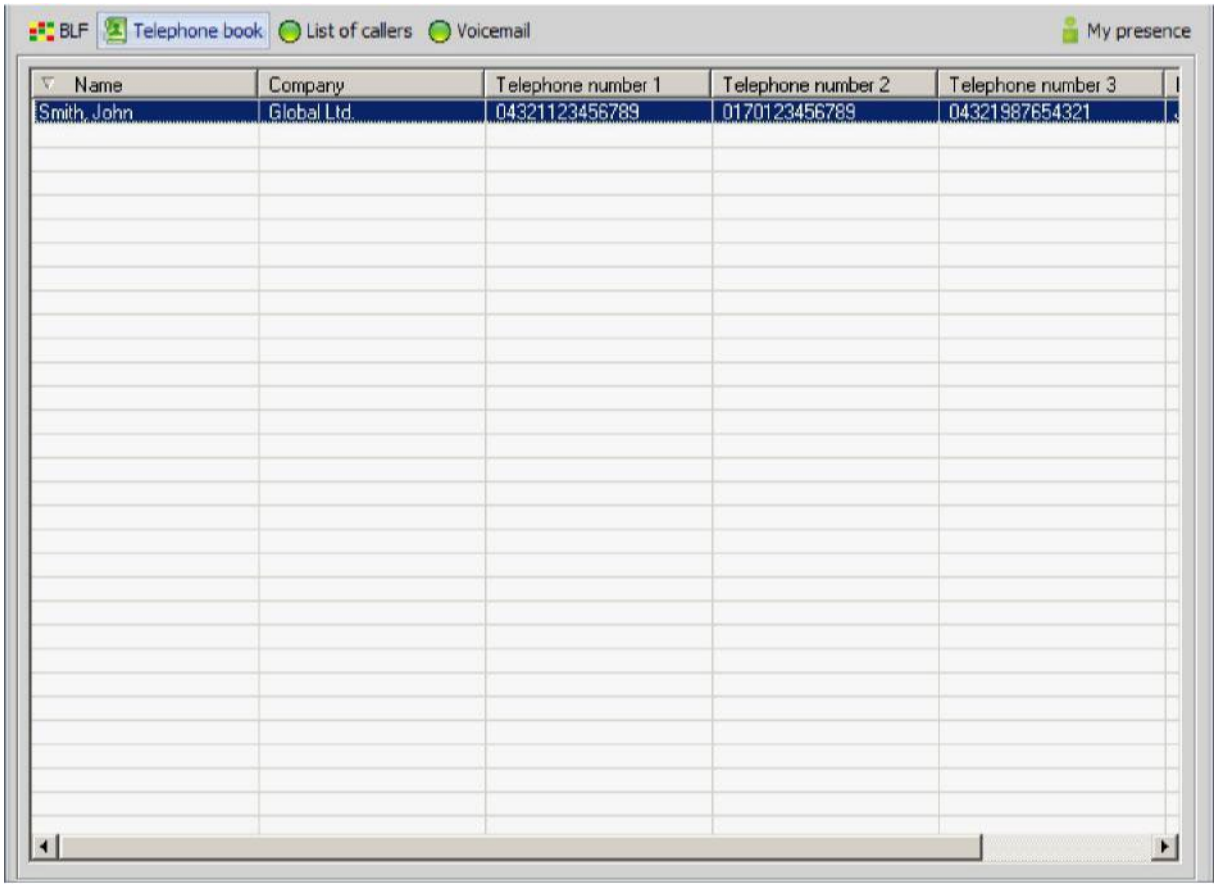
Area that is always visible:



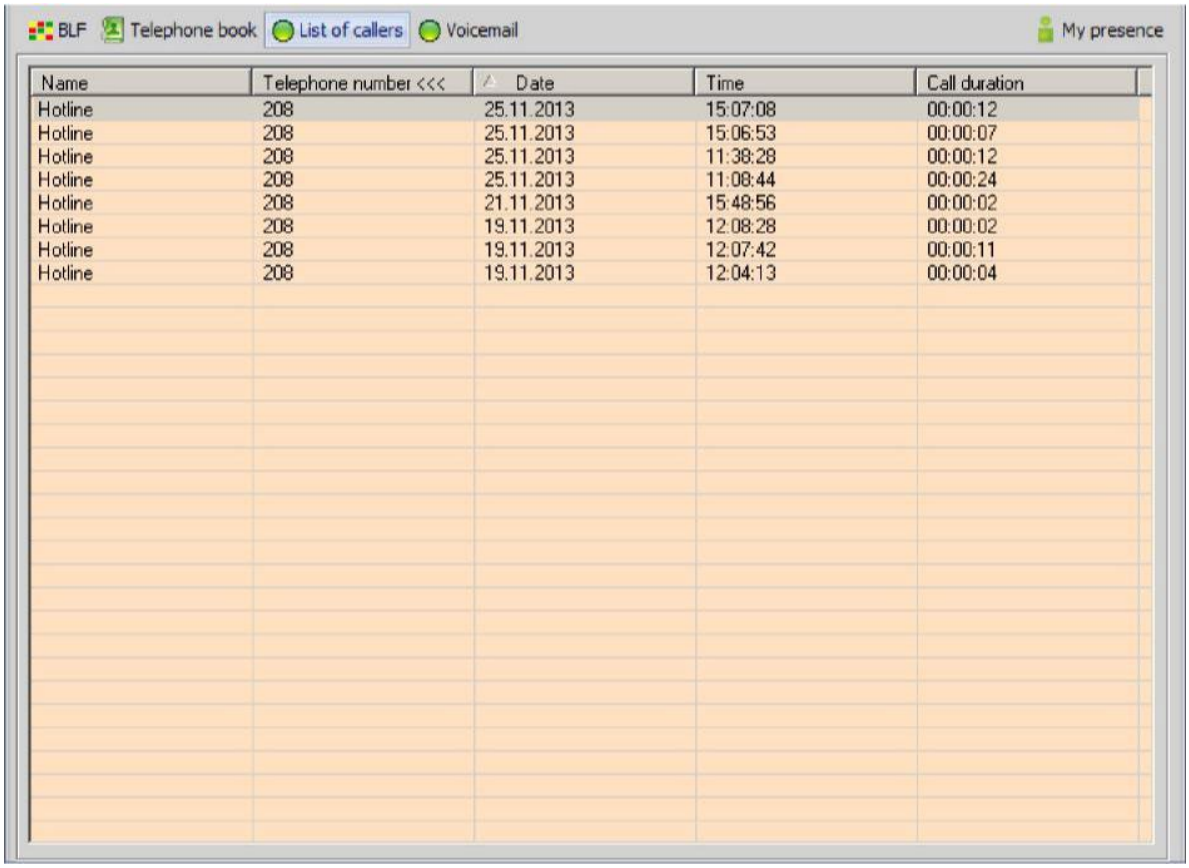
Changing area:

The Busy Lamp Field (default)

Telephone book

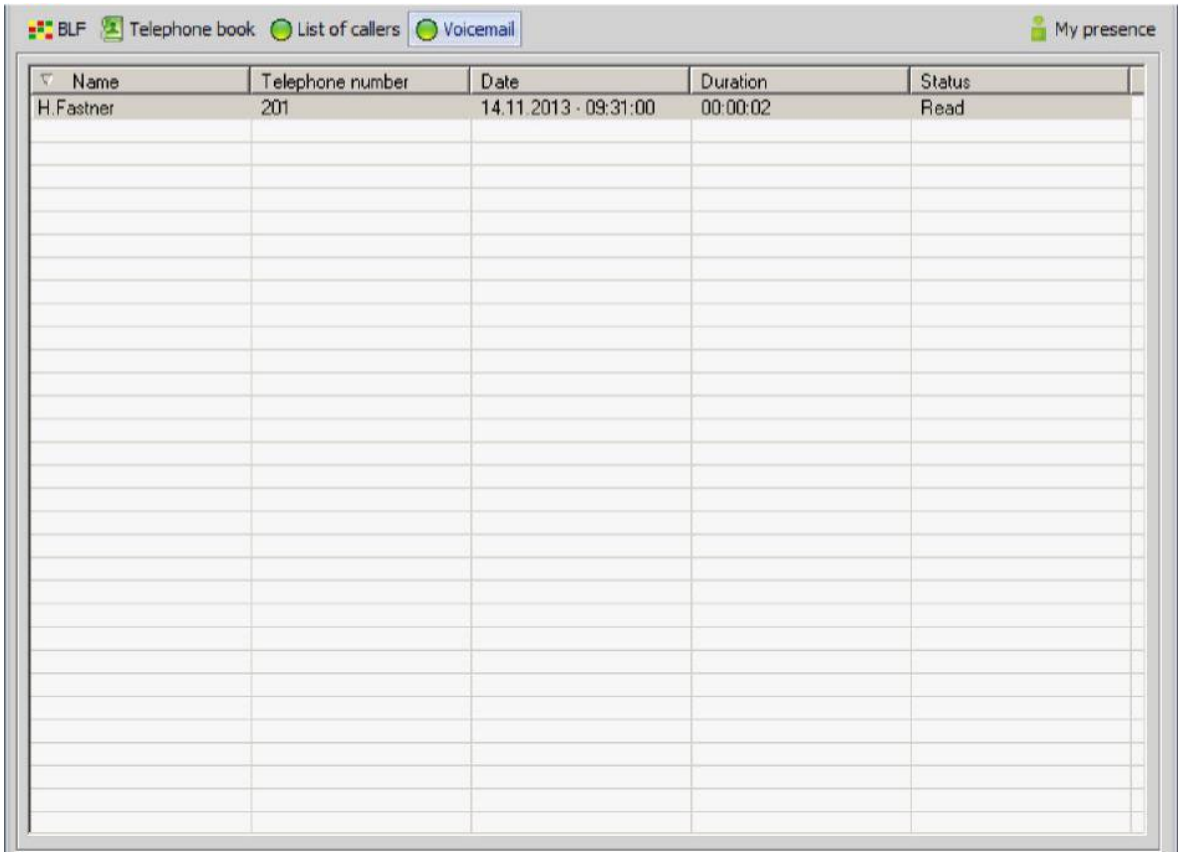


List of callers



! **Important:** These require a corresponding UC license

Voicemail



! **Important:** These require a corresponding UC license

Status display

You obtain important information about the communication with the connected telephone in the status display. Normally, ‘Ready for operation’ is located in the left-hand area during operation. If messages such as ‘Transmission error’, ‘LOGIN FAILED’ or the ‘Please wait’ status remain for a longer period time, inform your IT support for the telephone system.

The right-hand area of the status display signals the following status using symbols:

- Connection to presence server
- Conference call
- Display suppression
- Activate night answer
- Mute on/off

3.1.1 The function bar

The function bar provides you with various features that you can select using the mouse or using the function keys (F keys).

They are as follows:

Consultation (or press F2)

The calling party is kept in consultation using this feature. The person on hold cannot hear the active call. To get back to the person on hold, press the ‘Consultation back’ button.

Toggle (or press F3)

You can toggle between the two calling parties using the ‘Toggle’ function. The person on hold cannot hear the active call. Press the ‘Toggle’ button. You change to the person who is on hold. There first needs to be a calling party in consultation and an actual call in progress.

Consultation back (or press F4)

If you have a person in consultation, you can return to this person using this button.

Transfer (or press F5)

You can transfer a received call to an internal or external subscriber. To do so, you need to place the current call in consultation and call the required subscriber.

Press this button to transfer the current call to the subscriber held in consultation.

Disconnect (or press F6)

Terminate your current call by pressing the ‘Disconnect’ button. If you keep a subscriber in consultation and speak with another subscriber, then these two are connected.

! **Note**: These functions are also available on the ‘toolbar’ and can also be assigned to function buttons on the ‘busy lamp field (BLF)’.

3.1.2 The menu bar

The menu bar provides you with various functions that you can select using the mouse.

They are as follows:

Combination box for ‘Search’ and ‘Manual dialing’

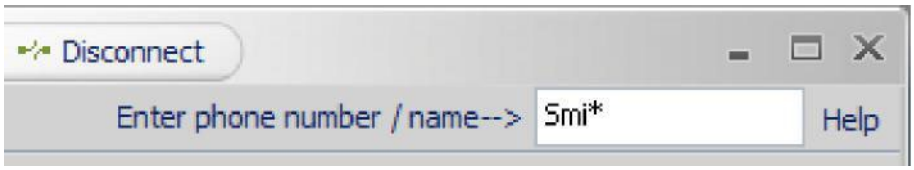
Search in the telephone book/manual dialing

! **Note:** You only have to press the space bar to activate the ‘Search/Manual dialing’ combination box.

Search in the telephone book

In the activated telephone book, you can search for names of people using the combination box. All of the matching entries are displayed in the list of the telephone book area.

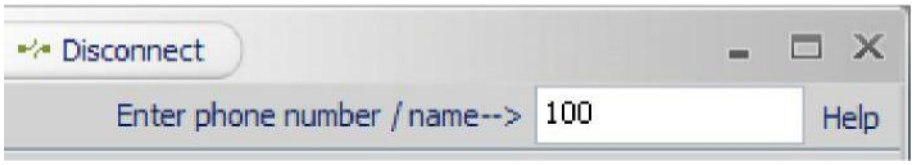
! **Note**: The search results that return form Outlook contacts are based on the searching mechanism of MS Outlook.



Manual dialing

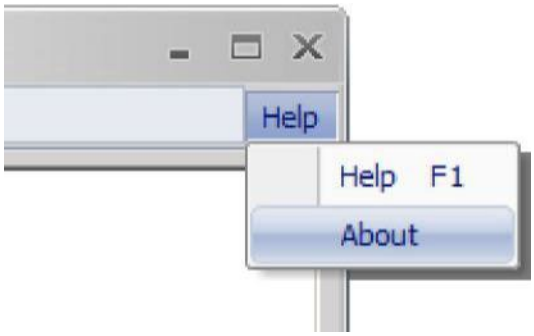
If you wish to make an outgoing call, press the space bar and enter the required telephone number. The software will now automatically dial a number and make the connection.

! **Note**: If you have an active call, consultation is automatically activated.



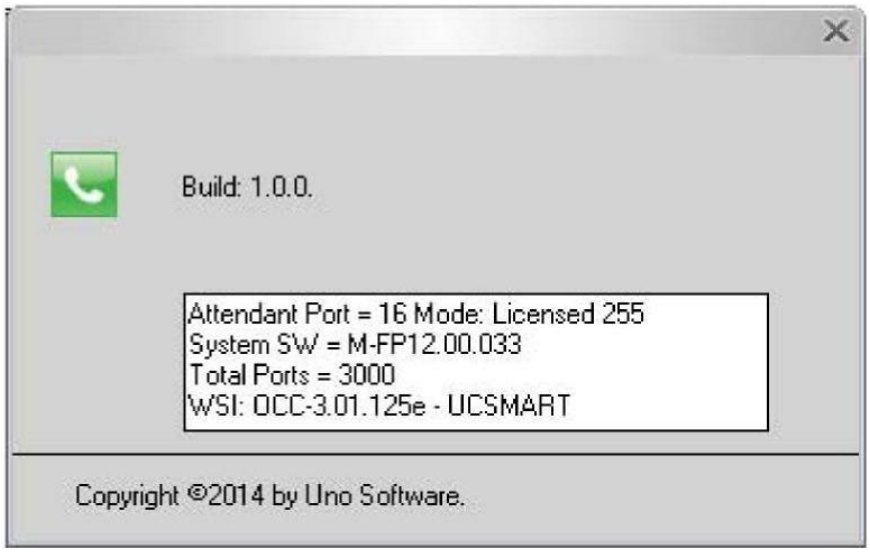
Help

Click here (or press F1) to call up the help function.

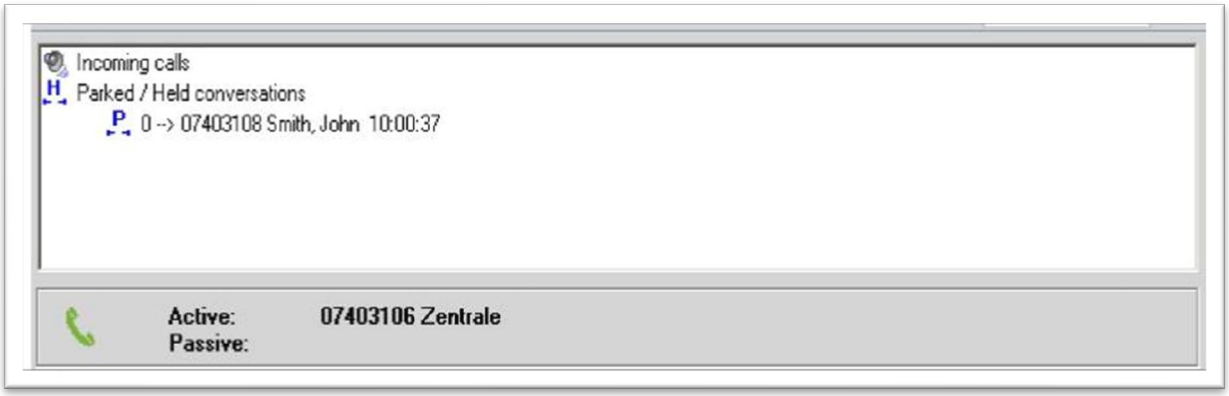


About

Here you will find information about your version of the software.



Display for incoming calls and parked/held conversations



The incoming and parked/held conversations are visually displayed in this section of the main window. These are displayed with corresponding symbols.

They are as follows:

- External call
- Internal call
- Recall
- Discarding call
- Priority call
- Other calls

This includes the number of the calling party as well as information regarding with whom the caller wants to speak*.

! **Note**: At incoming calls will be searched in internal telephone book and system speed dial* for name. Information about active and passive calls is provided in the lower section of the list box.

The call is accepted by double-clicking the entry. You can also transfer a call to any desired subscriber on the busy lamp field using drag and drop. See also ‘Deflect a call’.

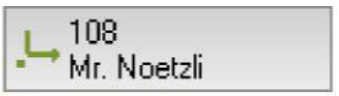
You can accept parked or held conversations by double-clicking the required entry. * If available

! **Note**: Only devices which support Unified Name Messages (e.g. CP600, OpenStage 60/80), will display information like forwarding details, numbers, contact names etc. Low end devices do not support Unified Name Messages, hence such information is expected not to be displayed on OpenScape Business Attendant User Interface (UI).

3.1.3 The busy lamp field

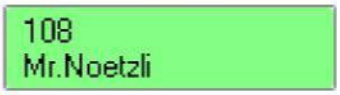
The busy lamp field (BLF) provides a clear indicator of the subscriber status if connected and the line status using appropriate symbols with various colors.

Examples



Mr Noetzli's extension is being redirected.

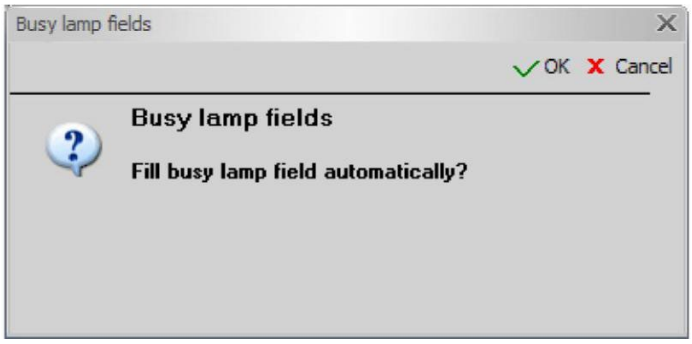
Mr Fastner is being called.



Mr Noetzli's internal line is engaged.

Mr Fastner's external line is engaged.

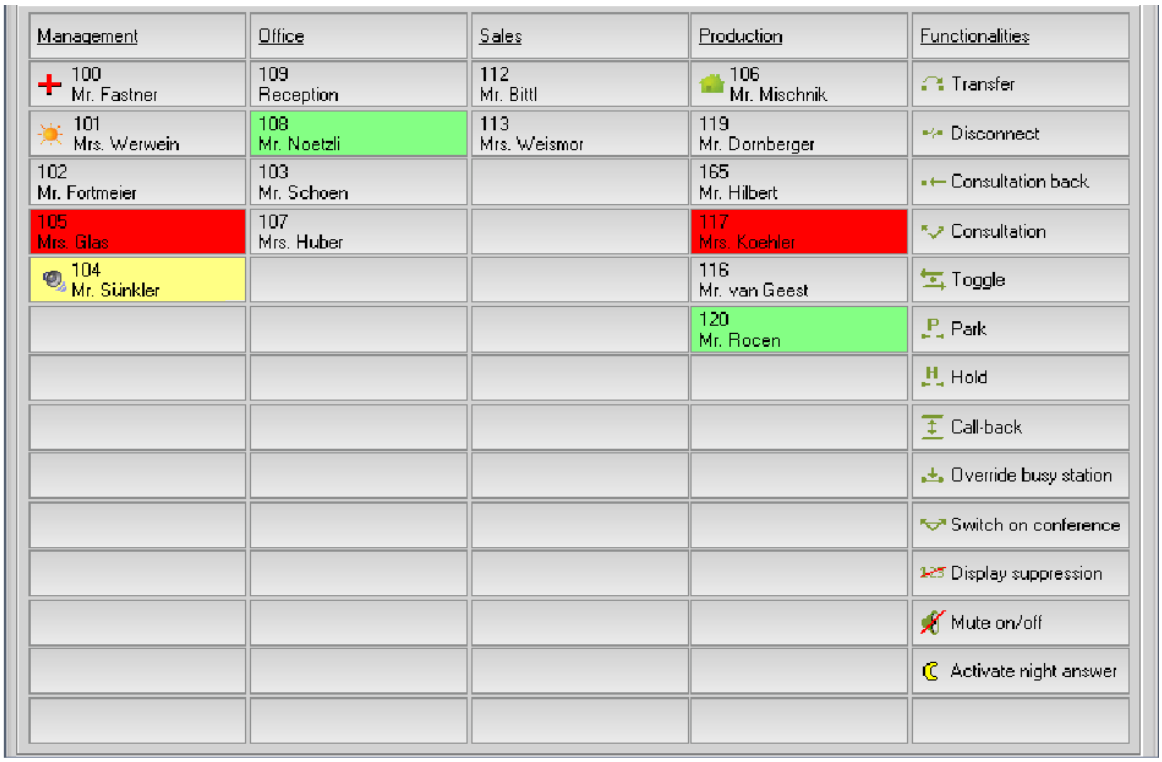
The first time you start the software, you will be asked to automatically enter the telephone numbers from the telephone system's local port list into the busy lamp field.



The window automatically changes corresponding to the size. All fields of the busy lamp field are automatically adapted.

There are 75 busy lamp fields on the BLF in the main window.

If there are more than 75 subscribers in the telephone system, the remaining entries are redirected to the 'second BLF'.



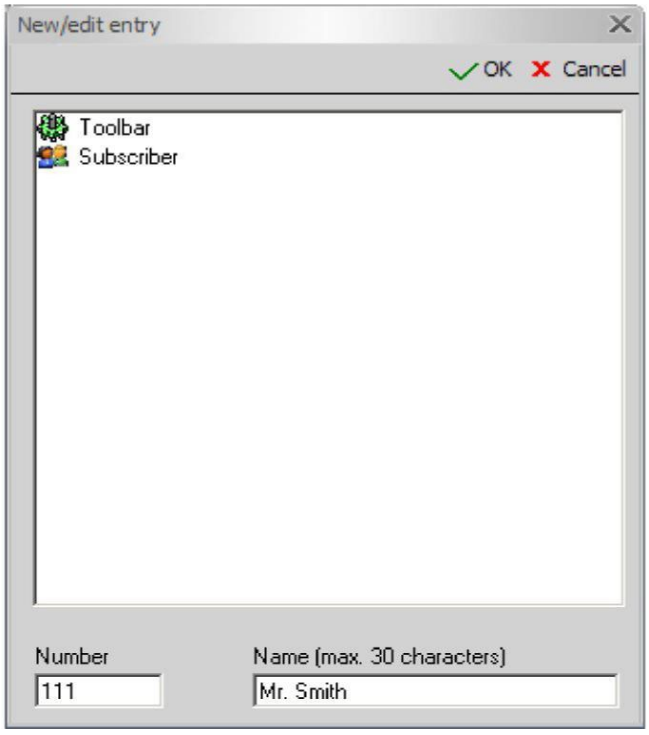
In addition to the display functions, there are other options available. The following options are listed by right-clicking the busy lamp button:

! **Note:** The menu display varies depending on the status of the call.

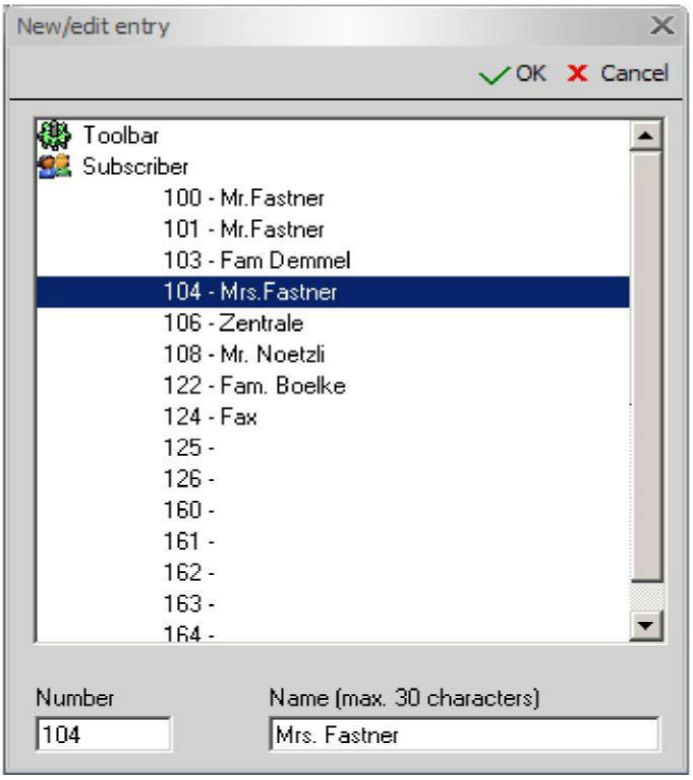
New/edit entry

You can enter a new subscriber on your busy lamp field by clicking the 'New/edit entry' button.

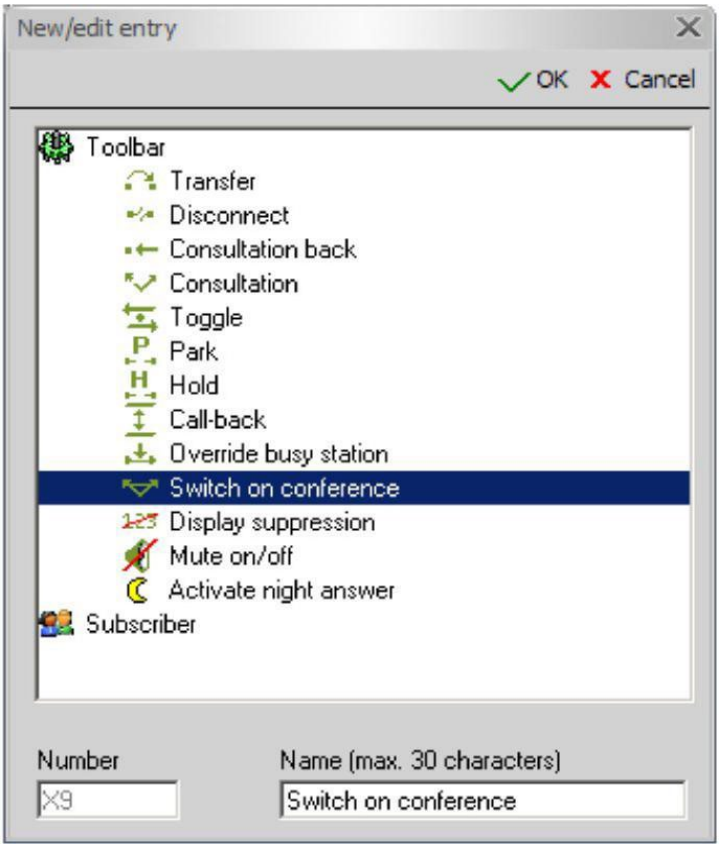
! **Note**: The telephone or presence status displays are only updated when the new subscriber changes his/her status.



Using the mouse, select an entry from the available list or enter the subscriber's telephone number and name and confirm with 'OK'.



The new subscriber is then saved in the field that you selected on your BLF.



! Note: The software allows you to save all of the features available on the 'toolbar' on the busy lamp field as 'function buttons'. This function is only available in the main window.

Delete entry

If you wish to delete a subscriber from your busy lamp field, right-click the subscriber and click ‘Delete entry’. The subscriber you selected is immediately deleted from your busy lamp field.

Insert caption

You can insert captions to enable you to make your busy lamp field clearer and more transparent. Enter the required caption text.

Activate call forwarding

If necessary, you can activate call forwarding for a subscriber to internal or external telephone numbers.

Call forwarding is now designated using a symbol.

! **Important:** This requires special authorization.

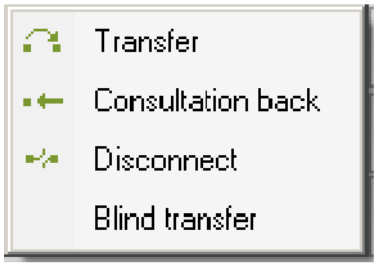
Deactivate call forwarding

You can deactivate call forwarding if this is no longer required.

The symbol for call forwarding immediately goes dark on the appropriate busy lamp field.

! **Important**: This requires special authorization.

Right-click during an active call to open the pop-up menu and take advantage of the following functions.



Transfer

You can transfer a received call to an internal or external subscriber.

To do so, you need to place the current call in consultation and call the required subscriber. Press this button to transfer the current call to the subscriber held in consultation.

! **Note**: This function is also available on the ‘function bar’ (or by pressing F5).

Consultation back

If you have a person in consultation, you can return to this person using this button.

! **Note**: This function is also available on the ‘function bar’ (or by pressing F4).

Disconnect

Terminate your current call by pressing the ‘Disconnect’ button. If you keep a subscriber in consultation and speak with another subscriber, then these two are connected.

! **Note**: This function is also available on the ‘function bar’ (or by pressing F6).

Blind transfer

This function allows you to directly connect to the subscriber on the busy lamp field (BLF). To do so, answer the call as usual and right-click the subscriber you wish to connect to the call. Then select the ‘Blind transfer’ function.

Presence

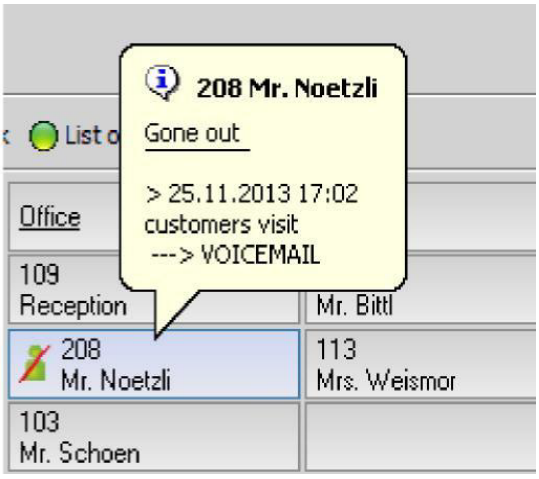
You have the option to set presence statuses for the subscribers from the telephone system. These are displayed on the busy lamp field with corresponding symbols.

They are as follows:

- Office
- Meeting
- Sick
- Break
- Gone out
- Holiday
- Lunch
- Home

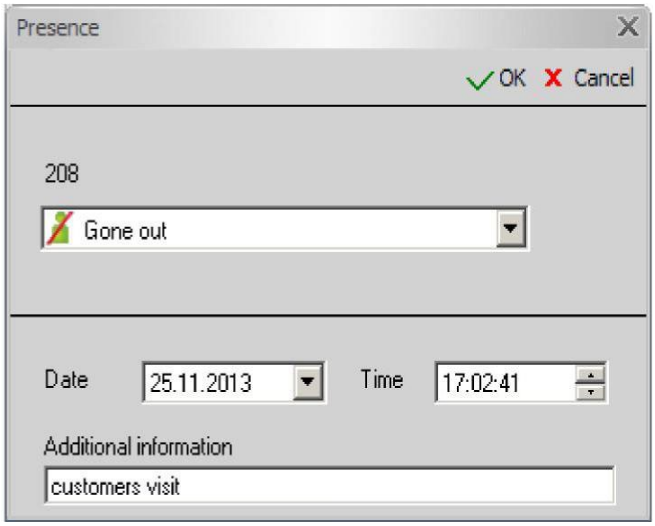
! **Important**: This requires a corresponding UC license.

The infotext of the corresponding entry on the busy lamp field contains further information on the presence status of subscribers.



Open the ‘pop-up menu’ and right-click an entry to set a presence.

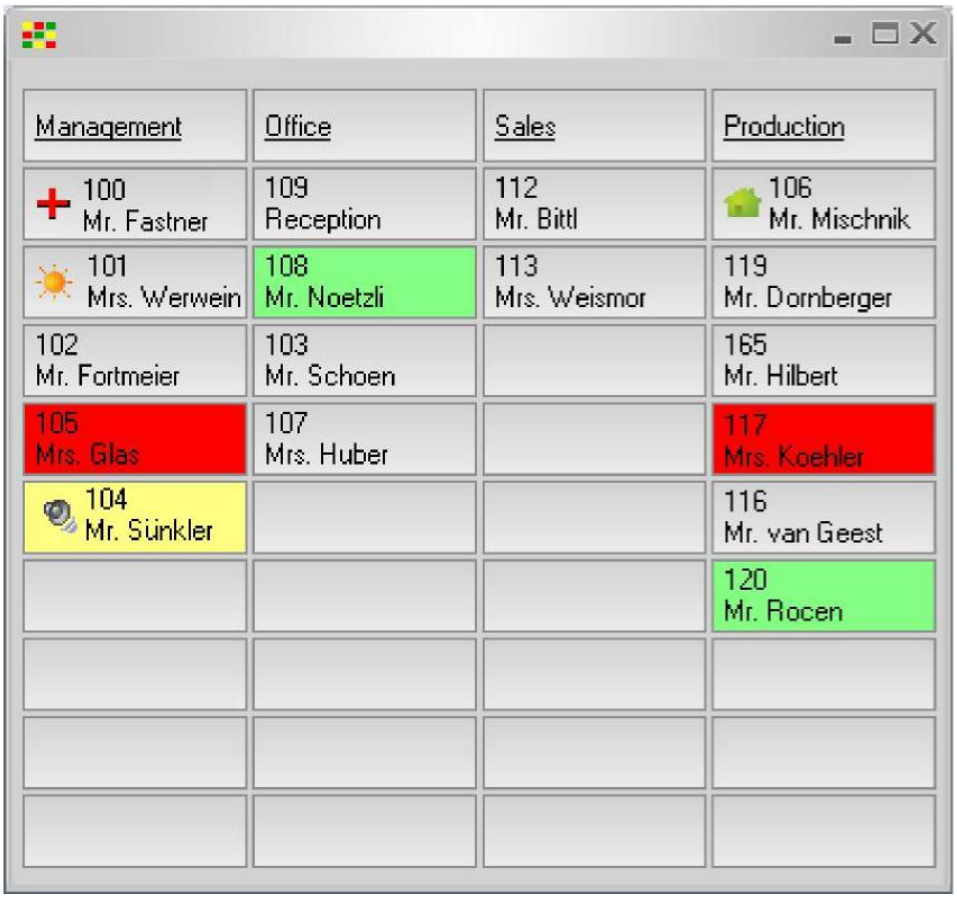
Enter the subscriber’s status along with the date, time and any additional information in the input screen.



! **Note**: The individual presence statuses are preset by the software but can be changed if necessary.

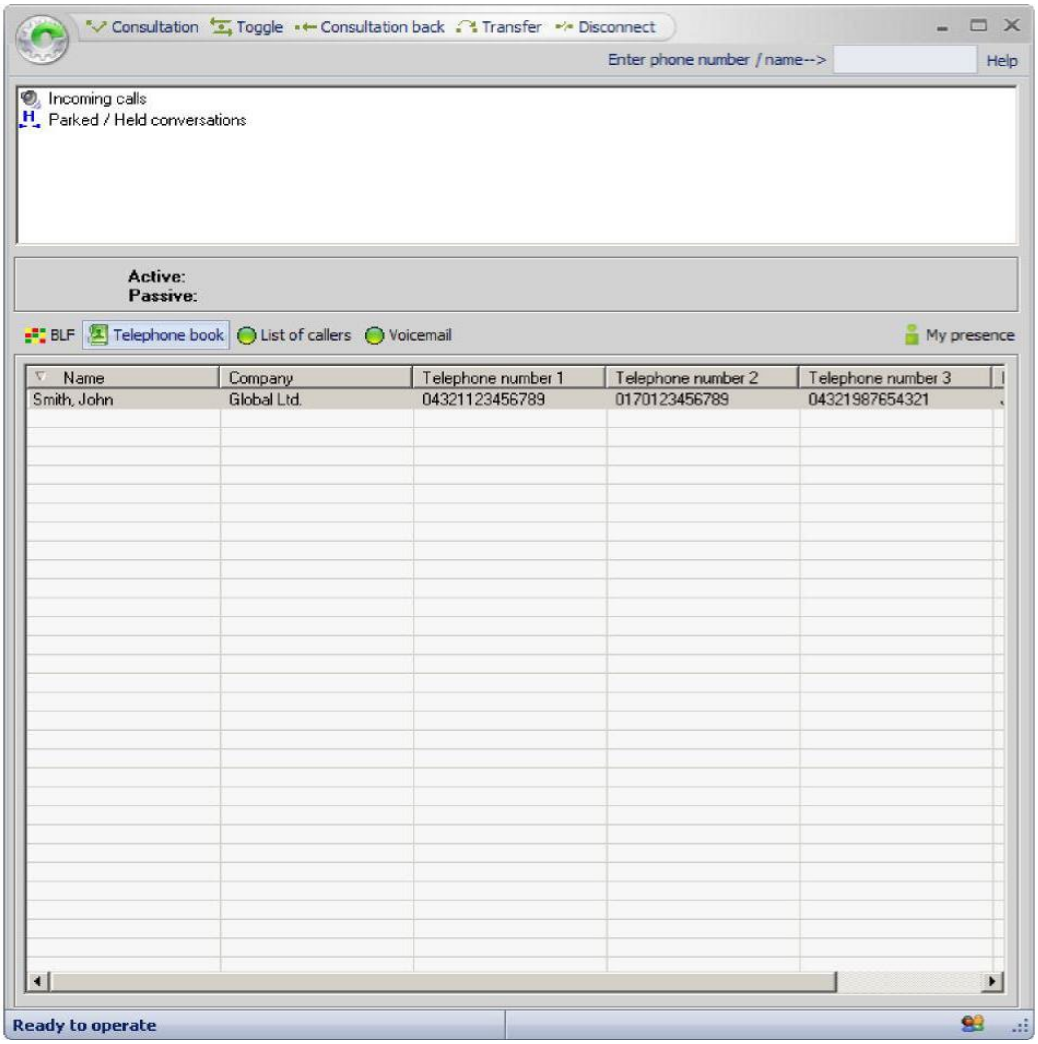
The second busy lamp field

As an option, the software can provide you with a second busy lamp field with a maximum of 350 BLFs.



The second busy lamp field provides the same functions as the busy lamp field in the main window, however, without implementing the features.

3.1.4 The telephone book



The software allows you to access several different telephone books. The following can be selected:

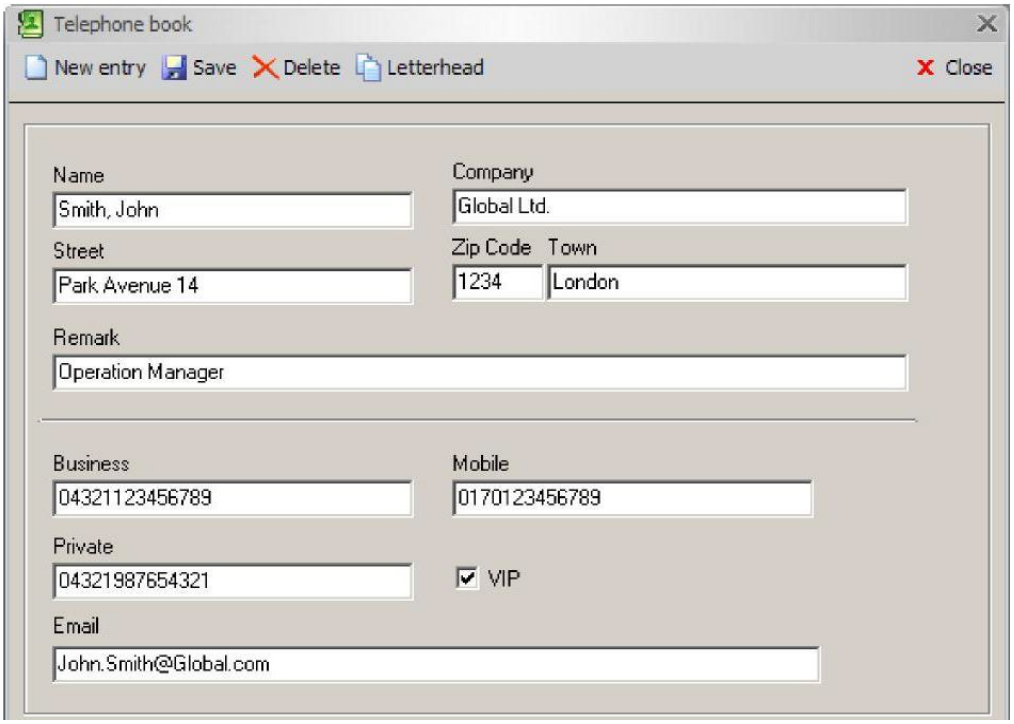
Internal telephone book

The software features a local, internal telephone book.

You can use it to conveniently search for subscribers and dial numbers. You can also display detailed subscriber information.

The internal telephone book is selected by default when installing the software.

The telephone book screen appears as follows:



The individual functions are mostly self-explanatory.

The ‘letterhead’ function is a special feature. Here, entry data is copied to the clipboard as a ‘letterhead’ and can be pasted to another program (such as Microsoft Word).

Microsoft Outlook

You can access all of the entries from your main contacts folder in Microsoft Outlook.

System speed dial

You can access all of the entries in your telephone system’s speed dial directory.

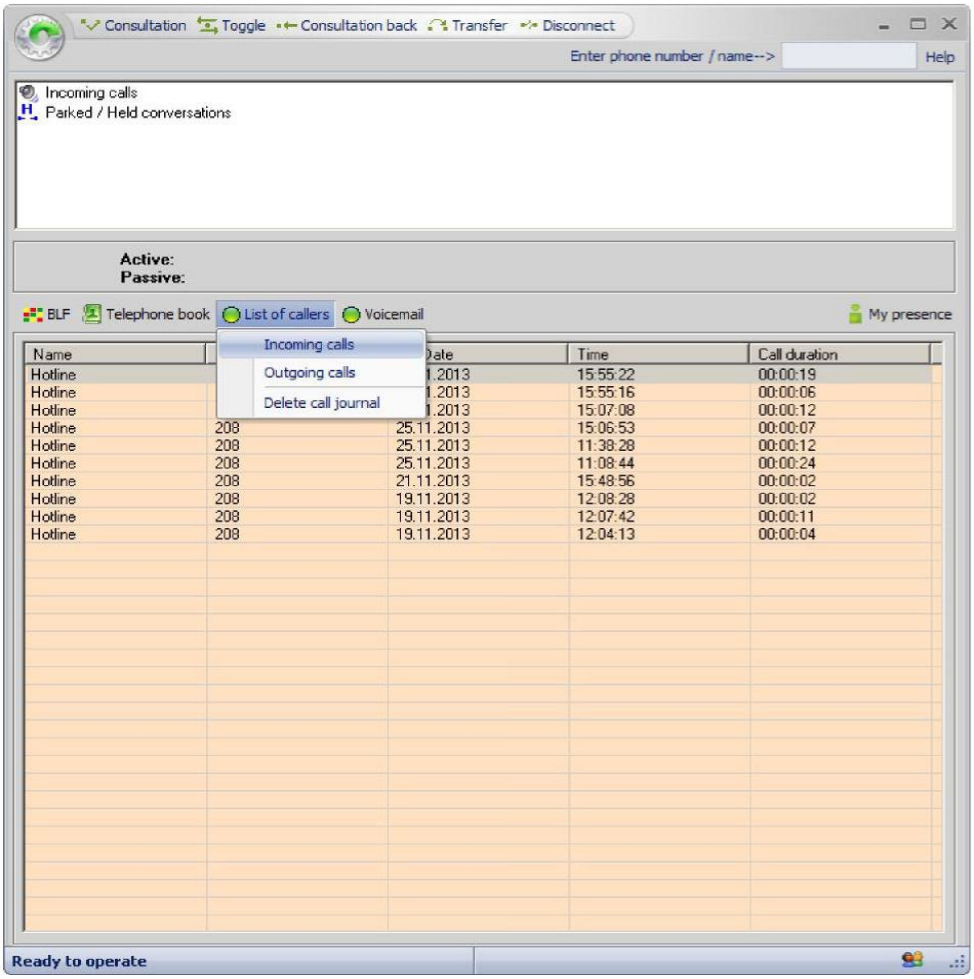
Open Directory / LDAP (UC Suite)

You can access all of the entries in your telephone system’s Open Directory Server. In case of any further questions please contact your system administrator.

! **Note:** You have read-only access for Microsoft Outlook and the speed dial directory.

Right-click the telephone book area to see this pop-up menu for the telephone book. See also ‘Using the pop-up menu’.

3.1.5 The list of callers



All incoming and outgoing calls from the speed dial directory are logged and displayed with the name, telephone number, date, time and call duration.

The ‘Telephone number’ column uses a symbol to designate which display the call journal is in:

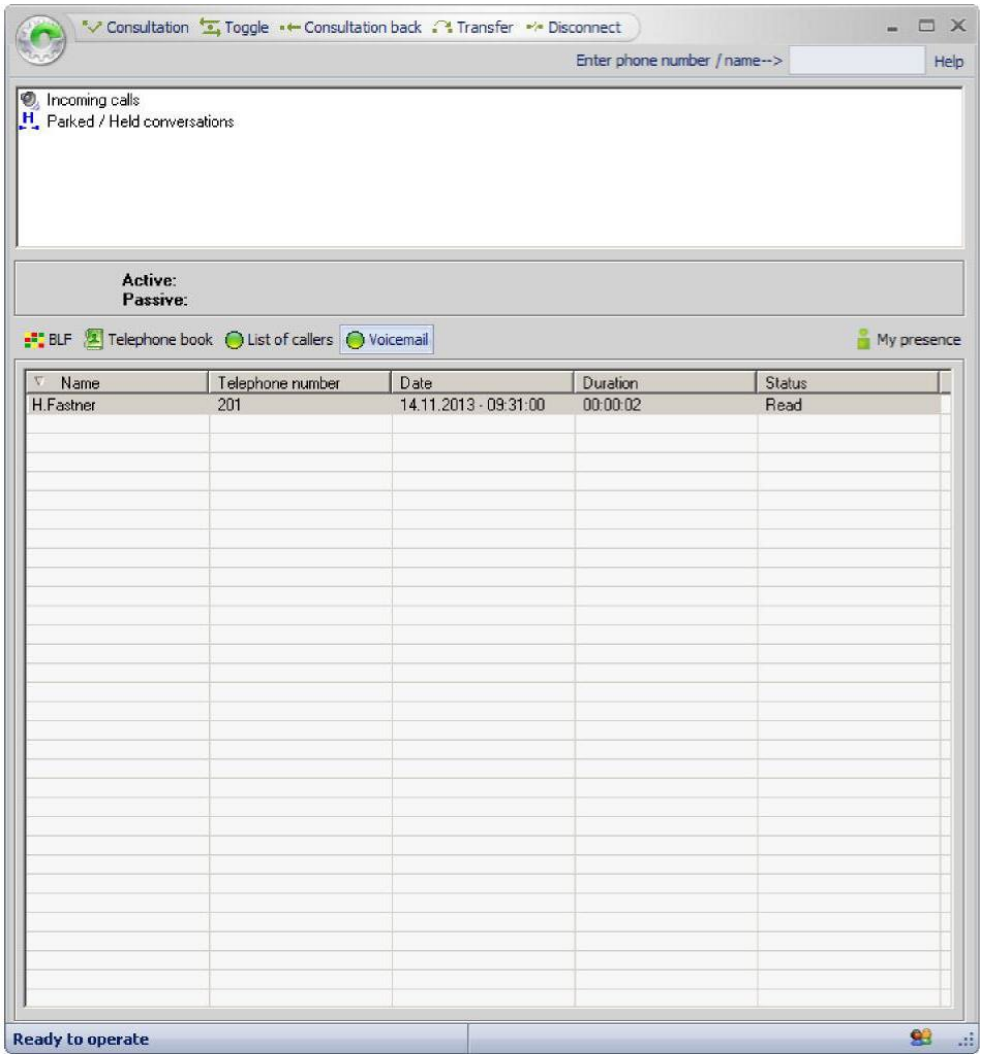
- Incoming calls are designated with an arrow pointing to the left.
- Outgoing calls are designated with an arrow pointing to the right.

Right-click individual entries or all entries via the pop-up menu to delete them from the call journal. See also ‘Using the pop-up menu’.

! Note: It is only possible to delete entries on certain telephone systems.

! Important: This requires a corresponding UC license.

3.1.6 Voicemail



The voicemail records voicemails centrally.

This view displays all voicemails along with the name, telephone number, date, duration and status.

The ‘Status’ column flags voicemails as read or unread.

You can listen to, stop and delete individual voicemails. See also ‘Using the pop-up menu’.

! **Important:** This requires a corresponding UC license.

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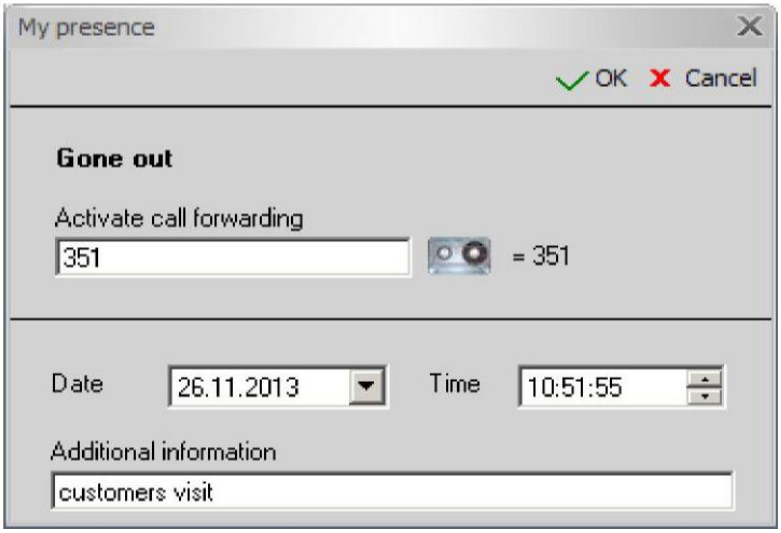
A31003-P3030-U118-02-7619,
06/2024
OpenScape Business Assistant V3, User Guide

3.1.7 My presence

Use this button to set your own presence.

Your status is displayed with the corresponding symbol on the button.

You can choose from a range of status options preset with different forwarding destinations and times. They can be changed at any time.



! **Important:** This requires a corresponding UC license.

3.2 The toolbar

The toolbar provides you with various features that you can select using the mouse.

When the software starts, you have the option of displaying the toolbar.

See also ‘Settings’.

You can always call up the toolbar if it is not visible using the Ctrl+T key combination.

The following individual features are available:

Transfer

You can transfer a received call to an internal or external subscriber. To do so, you need to place the current call in consultation and call the required subscriber.

Press this button to transfer the current call to the subscriber held in consultation.

! **Note:** This function is also available on the 'function bar' (or by pressing F5).

Disconnect

Terminate your current call by pressing the 'Disconnect' button. If you keep a subscriber in consultation and speak with another subscriber, then these two are connected.

! **Note:** This function is also available on the 'function bar' (or by pressing F6).

Consultation back

If you have a person in consultation, you can return to this person using this button.

! **Note:** This function is also available on the 'function bar' (or by pressing F4).

Consultation

The calling party is kept in consultation using this feature. The person on hold cannot hear the active call. To get back to the person on hold, press the 'Consultation back' button.

! **Note:** This function is also available on the 'function bar' (or by pressing F2).

Toggle

You can toggle between the two calling parties using the 'Toggle' function. The person on hold cannot hear the active call. Press the 'Toggle' button. You change to the person who is on hold. There first needs to be a calling party in consultation and an actual call in progress.

! **Note:** This function is also available on the 'function bar' (or by pressing F3).

Park

Sometimes it is necessary to park a call.

The caller can listen to music and your telephone is free for additional incoming calls.

Simply double-click the entry on the list in the main window to speak to the caller who was parked.

! **Note:** There is a maximum of ten park slots available for the entire telephone system.

Hold

You can place external calls on hold, for example, to call another subscriber by pressing the 'Hold' button. In order to resume a conversation with a call on hold, double-click the appropriate entry on the list in the main window.

Call-back

You can activate an automatic call-back if the person you are attempting to contact cannot be reached. You obtain an appropriate message as soon as the person who you try to contact hangs up or the system identifies that a call-back is possible.

The call-back then appears as a normal call that you can accept by double-clicking.

Override busy station

If an internal subscriber's line is busy, you can override the busy station of the subscriber in urgent cases.

Call the busy subscriber. You will now hear the busy tone. You can now talk with the subscriber by pressing the 'Override busy station' button.

A warning signal lets him know that you have overridden the busy station.

! **Note**: The appropriate authorisation is required in order to use this particular feature.

Switch on conference

Using the 'Switch-on conference' feature, you can initiate a conference call by putting the active call in

consultation and calling another subscriber.

Once this second call is active, select the 'Switch on conference' key.

The participants in the conference call are now connected with one another.

Display suppression

Select the 'Display suppression' feature in order to prevent your phone number or your name from appearing on the display of the person you're calling. It is not possible to suppress the display for internal calls. If your number is suppressed, it is shown with a symbol in the lower section of the main window.

Mute on/off

You can temporarily mute the microphone on your telephone or headset. If you do so, you will continue to hear the person on the other end of the line, but they will no longer be able to hear you.

! **Note**: You must be making a call do this.

Activate night answer

This function activates the night answer for your telephone system, provided that you have the necessary authorization.

Show telephone book

Click this button to open the first entry in the internal telephone book.

Service

You can manually update the system in the associated menu; in this case, the telephone system transfers all of the features and subscribers to the software.

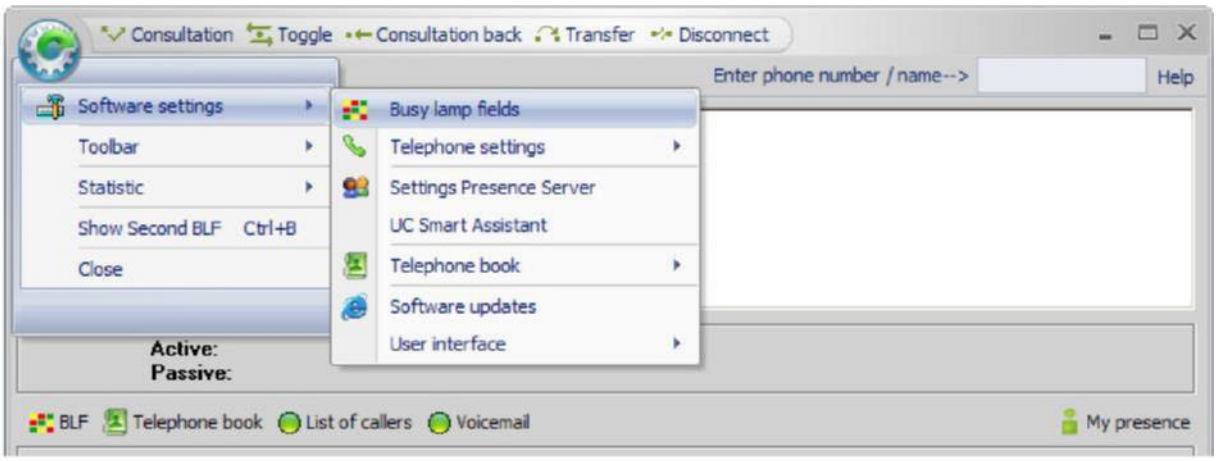
'Software updates' opens a separate window showing the updates available for download. This option is also available in 'Settings'.

The port list shows all of the active subscribers and telephone numbers that are connected to the telephone system. You can use this window to import all of the telephone numbers onto the busy lamp field (BLF).

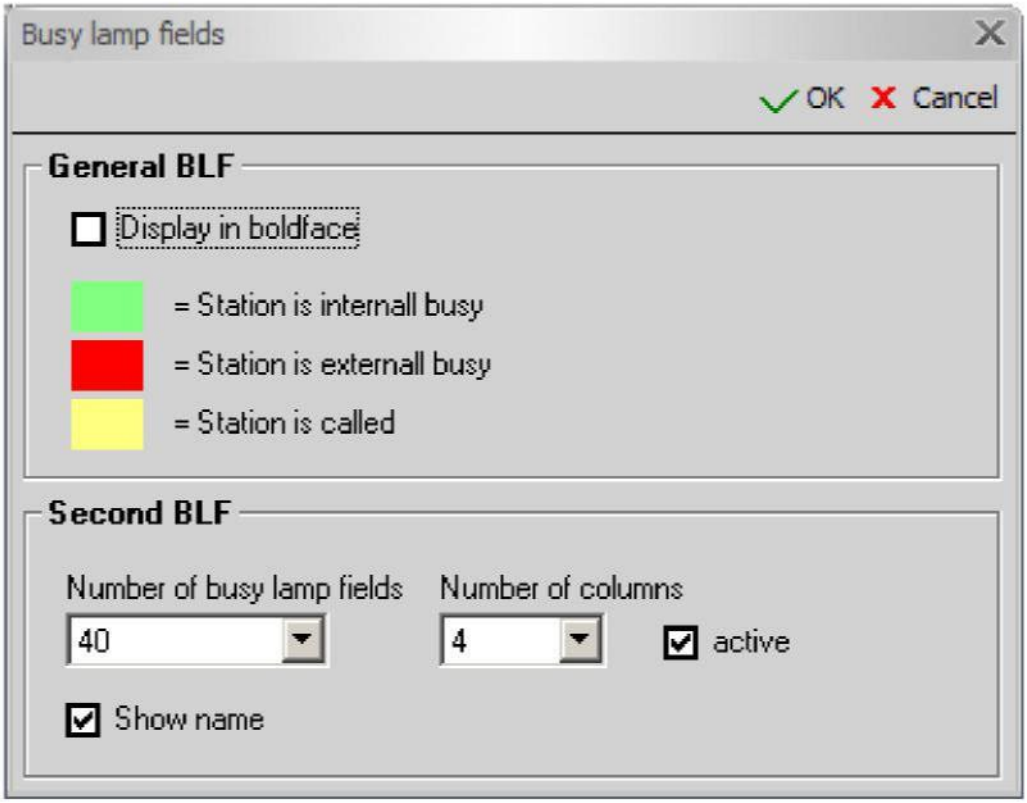
(See also ‘Put entries from port list on the BLF’).

4 Settings

4.1 Busy lamp fields



The following options are available for the busy lamp fields:



Display in boldface

Subscriber entries on the BLF can be shown in bold for improved visual display.

Second BLF

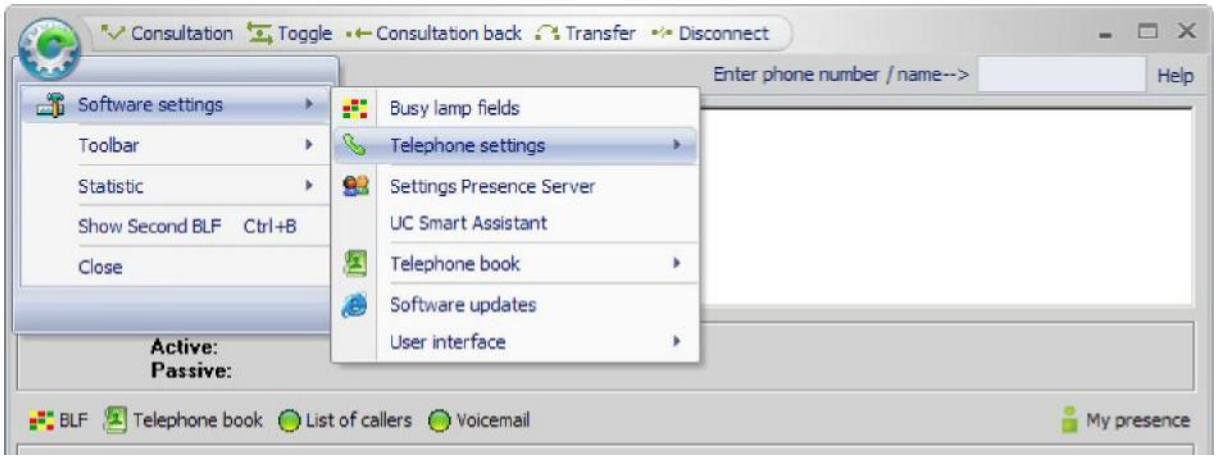
You can display a maximum of 350 busy lamp fields, depending on the display resolution.

The number of busy lamp fields and columns may vary. The software selects the best display format from these two values. It is possible that the number differs slightly.

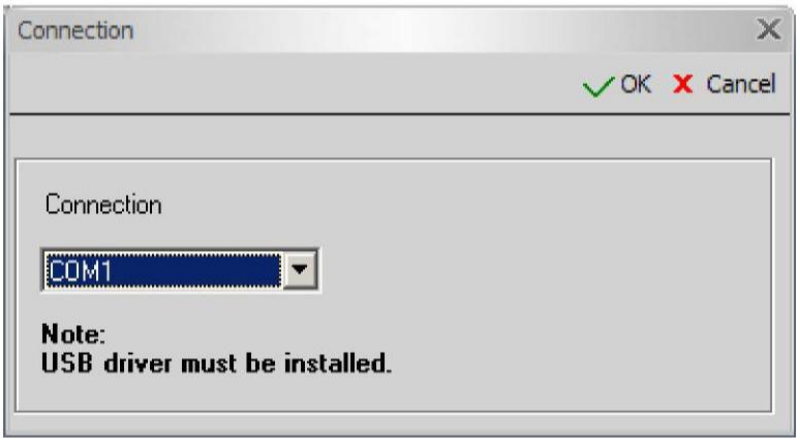
Show name

Select this function if you wish to display names as well as telephone numbers. The telephone number and name is always displayed on the busy lamp field in the main window.

4.2 Telephone settings



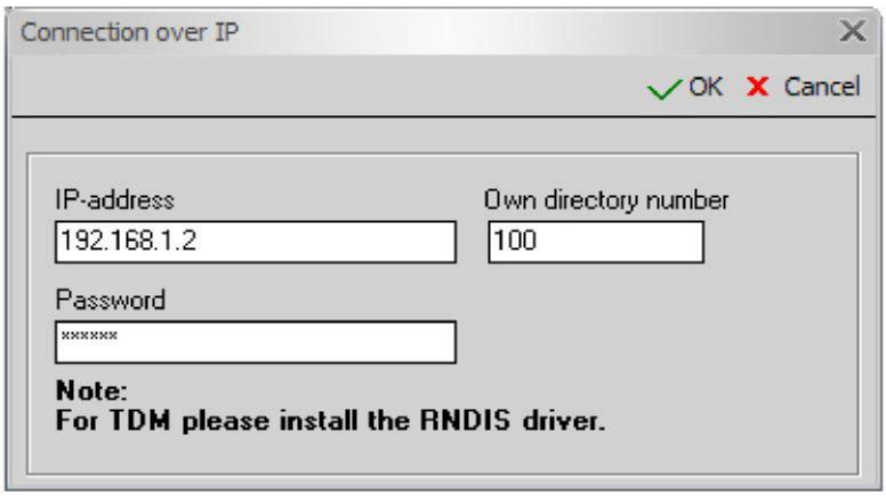
In the connection settings select the corresponding telephone.



Connection via

The software must be able to establish a connection to the telephone system. This is generally performed via the telephone that is connected to the PC. Data communication is carried out over a COM port (COM1–COM6) that you select here.

If you have connected your telephone via USB, the associated driver also provides a COM port.



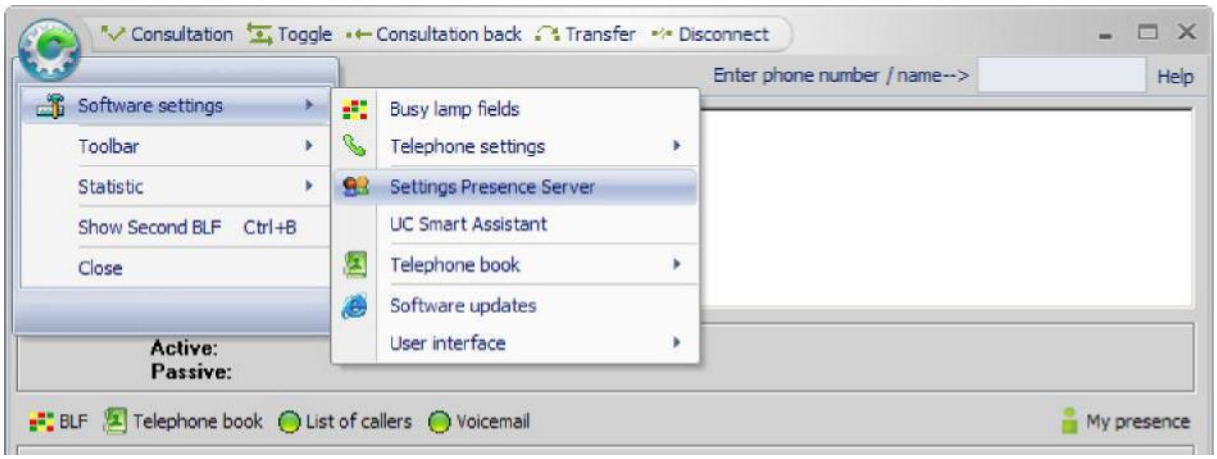
Connection over IP

The following data is required:

Enter the IP address of the telephone, the number of the extension and the associated user password.

If you have any questions, contact your IT support for the telephone system.

4.3 Presence Server



The following options are available in the server settings:

IP address of the presence server

Enter the IP address of the presence server here to set up a LAN connection to the telephone system.

Password

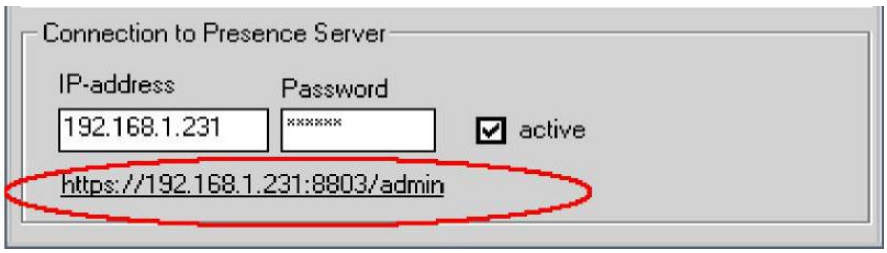
Enter the password of your extension here.

Active

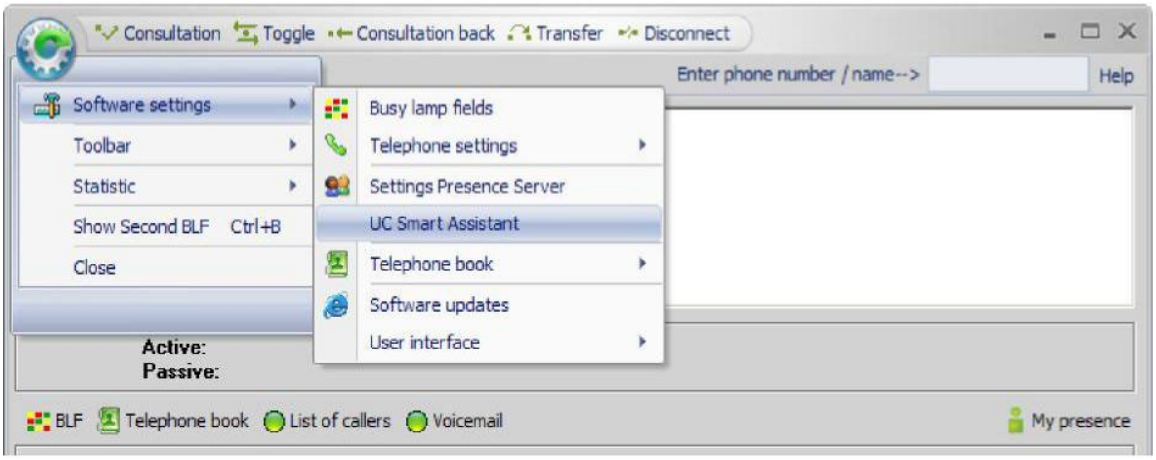
If you wish to maintain an active connection to the presence server, define it here.

The connection is displayed in the status bar of the main window using a symbol.

Click this link to log onto the UC Smart Assistant via your browser in order to change your password in the system.

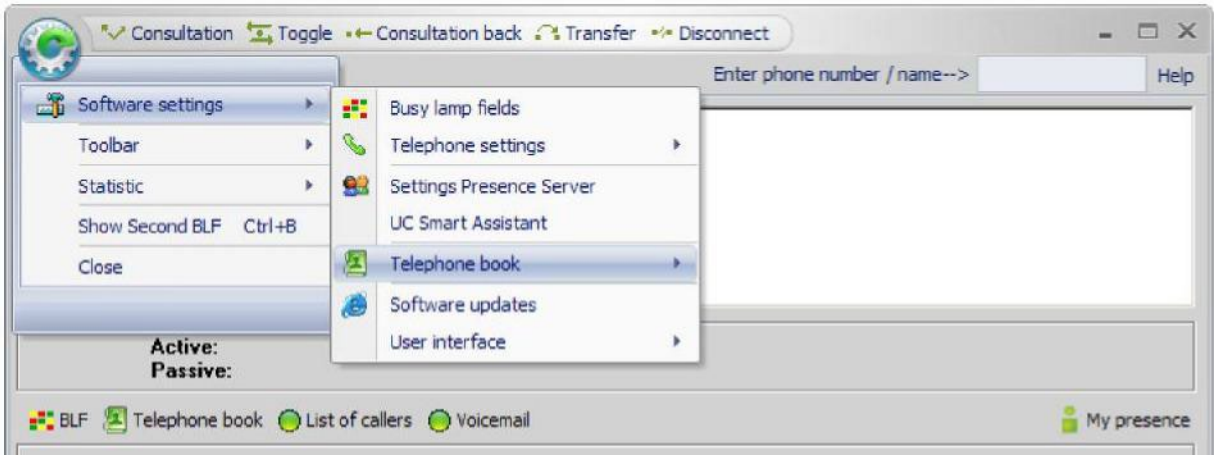


4.4 UC Smart Assistant



Use this menu item to log onto the UC Smart Assistant via your browser in order to change your password in the system.

4.5 Telephone book

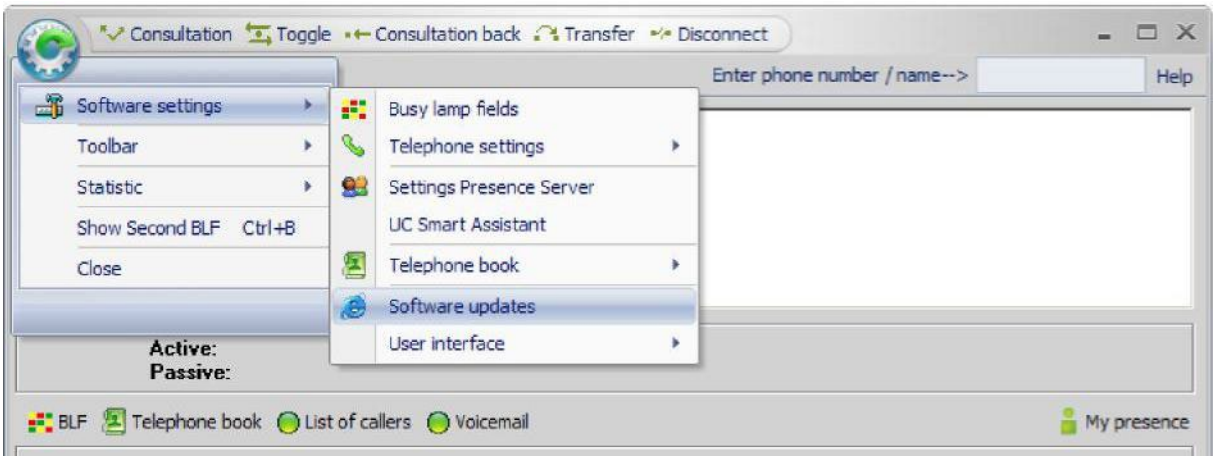


The software allows you to access several telephone books.

The internal telephone book is selected by default when installing the software.

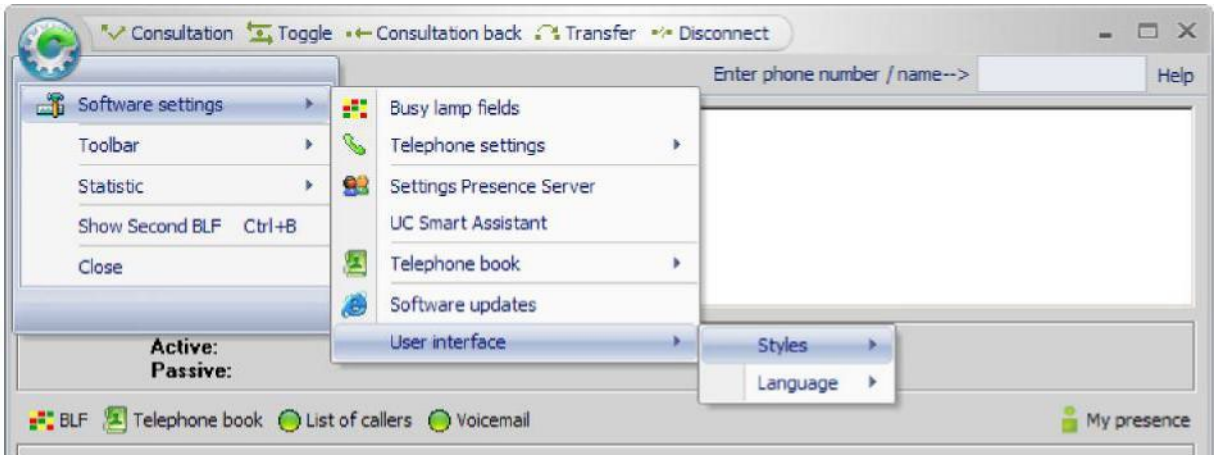
It is always possible to toggle between the telephone books during operation. The software always searches in the selected telephone book.

4.6 Software updates



'Software updates' opens a separate window showing the updates available for download. This option is also available on the 'toolbar'.

4.7 User Interface



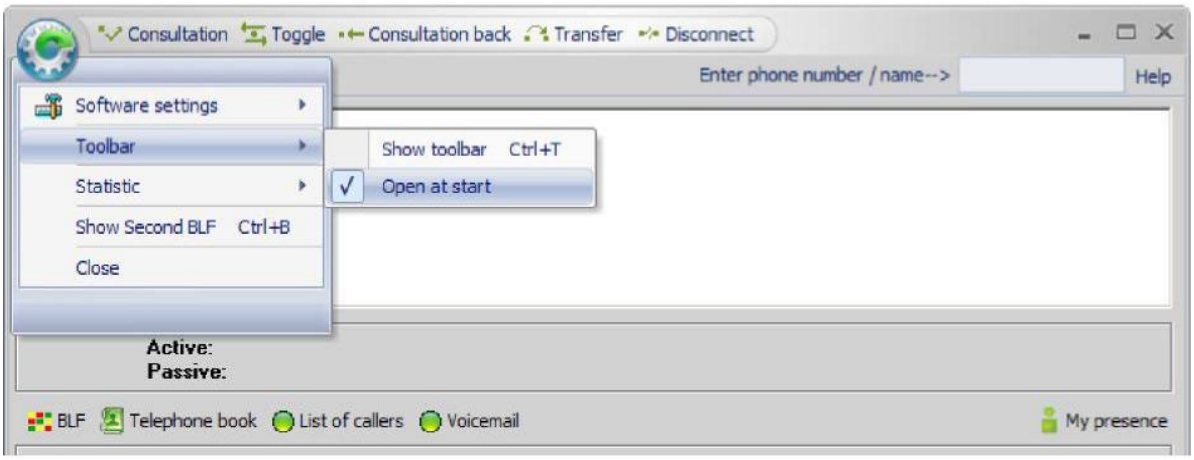
Styles

Here, you can select between various designs for your software layout. Configure the user interface according to your requirements.

Language

Please select the desired language. Some changes will be active only after restarting the software.

4.8 Toolbar settings



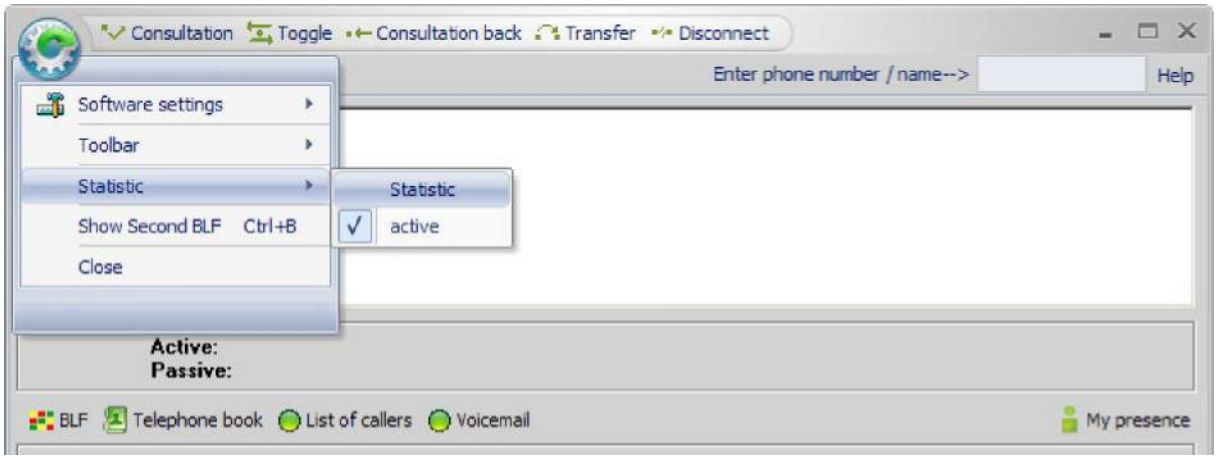
Show toolbar

If the toolbar cannot be seen, you can call it up here (or via the Ctrl+T key combination).

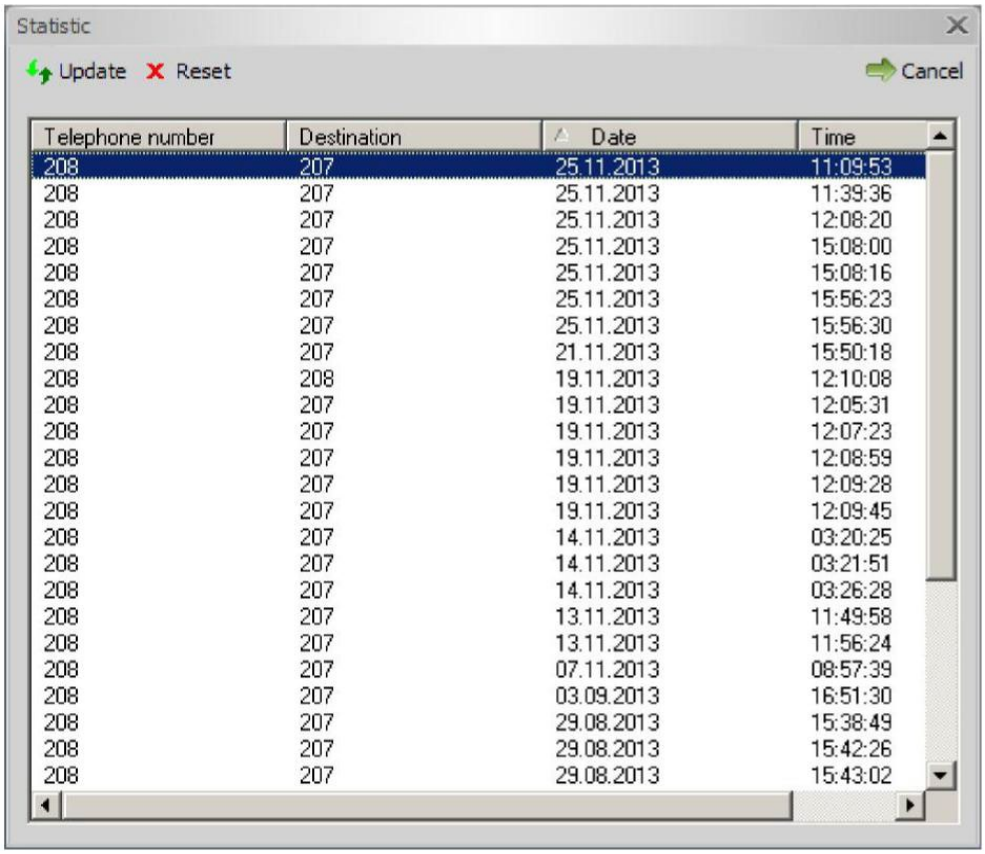
Open at start

Defines whether the toolbar should be automatically opened when the software starts.

4.9 Statistic

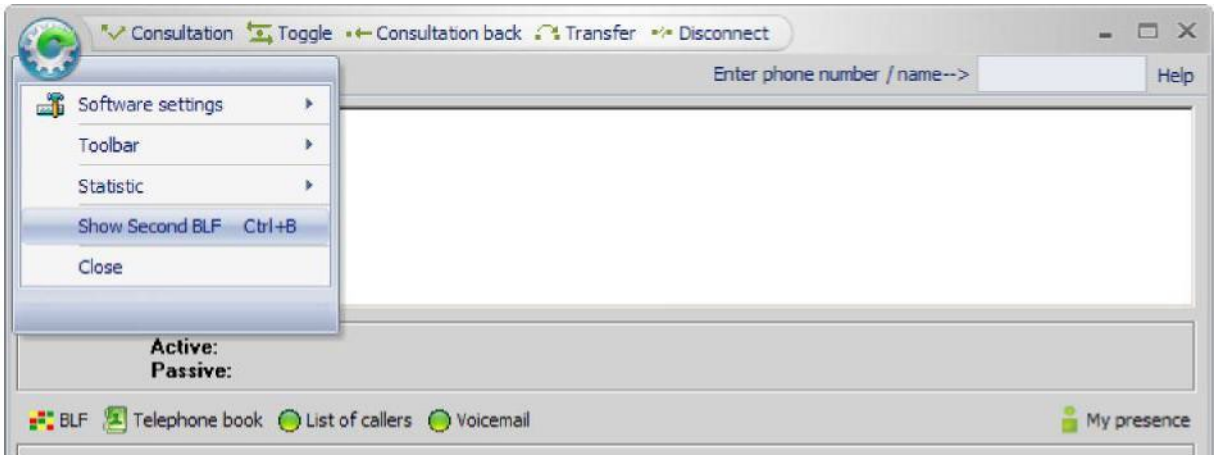


In a separate window, statistics shows you all incoming calls as well as the phone number, e.g. when calls are redirected.



If you wish to activate the statistic for your incoming calls make a tick here.

4.10 Show second BLF



Click here to show the second busy lamp field.

You can call up the busy lamp field if it is not visible using the Ctrl+B key combination.

5 How to

5.1 Accept a call

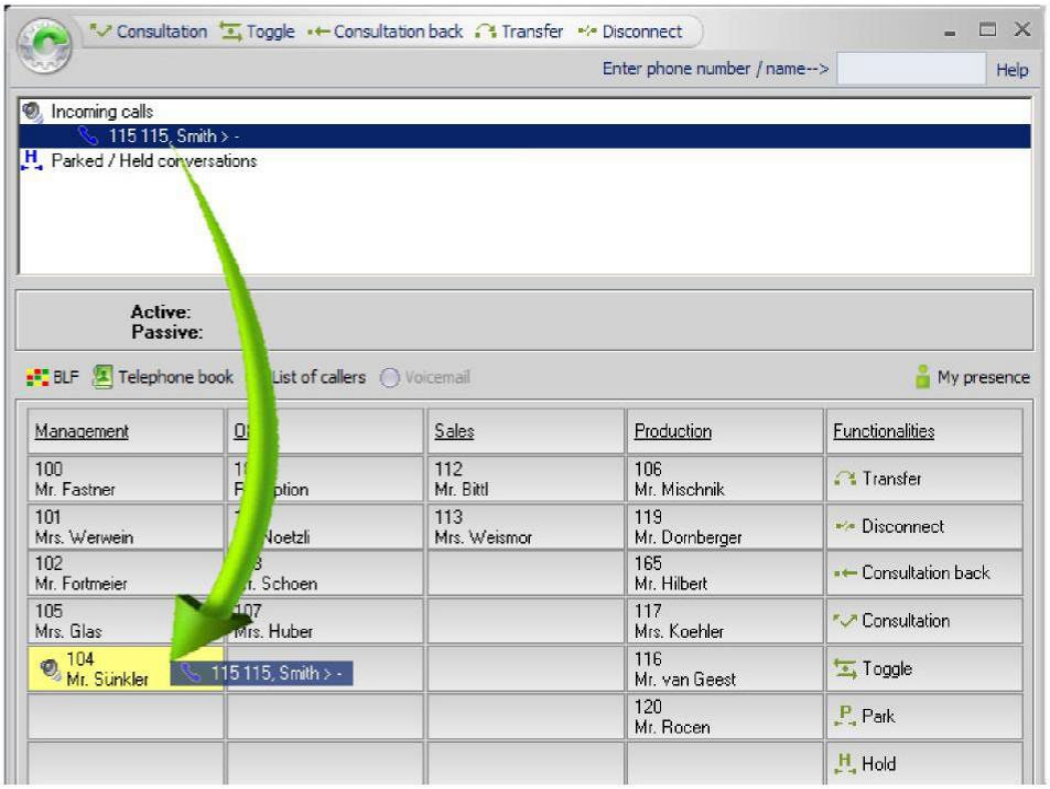
The 'call display' is available so that you can conveniently accept incoming calls. All incoming external, internal and private calls are displayed there.

You can specifically select and accept a call by double-clicking the required call.

5.2 Deflect a call

Drag & drop function

To deflect a call targeted to any subscriber on the BLF, you must select the incoming call (Shift + left mouse button) and drag and drop it to the desired subscriber of the BLF.



! **Important**: This feature is only available with a UC Smart license.

5.3 Dial a telephone number

If you wish to make an outgoing call, press the space bar and enter the required telephone number.

The software will now automatically dial a number and make the connection.

! **Note:** If you have an active call, consultation is automatically activated. The speaker on the phone is not activated automatically.

5.4 Park a call

You can park a call that has been accepted but that you have not transferred. During this time, the caller listens to music.

To park a call, proceed as follows:

Press the park symbol on the toolbar.
or
Click the 'Park' function button if it is set up on the BLF in the main window . Parked calls appear in the 'Parked/held conversations' list and can be retrieved from there.

Using the left mouse button, double-click the line of the parked call that you wish to accept. You are then connected again with the parked caller.

! **Note:** A maximum of ten calls per telephone system can be parked.

5.5 Hold a call

You can hold a call that has been accepted but that you have not transferred. During this time, the caller listens to music.

To hold a call, proceed as follows:

Press the hold symbol on the toolbar
or
Click the 'Hold' function button if it is set up on the BLF in the main window. Conversations on hold appear in the 'Parked/held conversations' list and can be retrieved from there.

Using the left mouse button, double-click the line of the held call that you wish to accept. You are then connected again with the caller on hold.

5.6 Toggle between two calls

You can toggle between the two calling parties using the 'Toggle' function. The person on hold cannot hear the active call.

To toggle between calls, either press the button on the 'function bar' (or press F3), the icon on the 'toolbar' or the function button if the BLF in the main window is set up.

The active and passive callers are displayed in the main window.

5.7 Activate the night answer

Activate the night answer function if your telephone exchange is not manned (for example, after working hours). External calls will then be forwarded to an internal number that you have selected (for example, the night guard).

To activate the night answer, click the symbol on the 'toolbar' or the function button, if the BLF in the main window is set up.

The night answer symbol is displayed in the status line.

! **Note:** You require special authorisation for this feature. Please ask your IT support for the telephone system.

5.8 Initiate a conference call

You can patch in additional subscribers during a call so that all of these subscribers can talk with one another in a conference call.

Please proceed as follows:

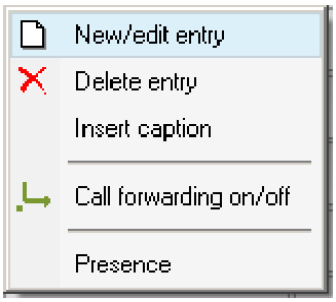
You are making a call and other subscribers are waiting.
Click the symbol on the 'toolbar' or the function button, if it is set up on the BLF in the main window. The symbol is displayed in the status line to show that all subscribers are now connected in a conference call.

Use the 'Disconnect' function (or press F6), the symbol on the 'toolbar' or the function button, if it is set up on the BLF in the main window to leave the conference call. The other subscribers remain connected with one another.

5.9 Use the pop-up menu

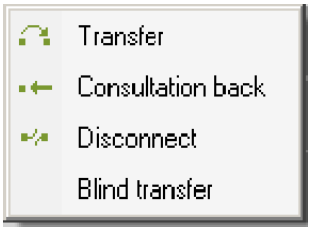
The pop-up menu helps you access the most important functions as quickly as possible. Right-click an area in the 'busy lamp field (BLF)' to open the pop-up menu.

! **Note:** The menu display varies depending on the status of the call.



The pop-up menu next to a blank field or a function button on the 'busy lamp field' appears as follows:

Right-click during an active call to open the pop-up menu and take advantage of the following functions:



Right-click the telephone book area to see this pop-up menu for the telephone book. The following menu appears for system speed dial and Microsoft Outlook:

Depending on the number of telephone numbers entered, a maximum of up to three telephone numbers are displayed in the pop-up menu. Select the business, private or mobile telephone number.

! **Note**: If you use numbers in canonical format, we assume the following format:

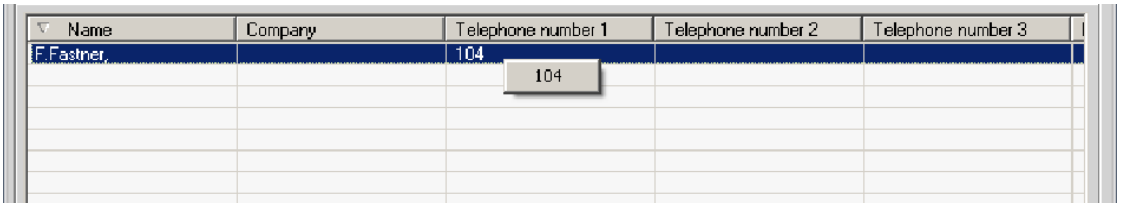
+ xx(xxxx)xxxxxxxxxxx
+ international call prefix (area code) local telephone number
Example Germany: +49 (89) 123456789

Click the e-mail address to open your e-mail client to send a message.

New/edit entry

The system speed dial or Microsoft Outlook input screen opens, depending on the telephone book selected.

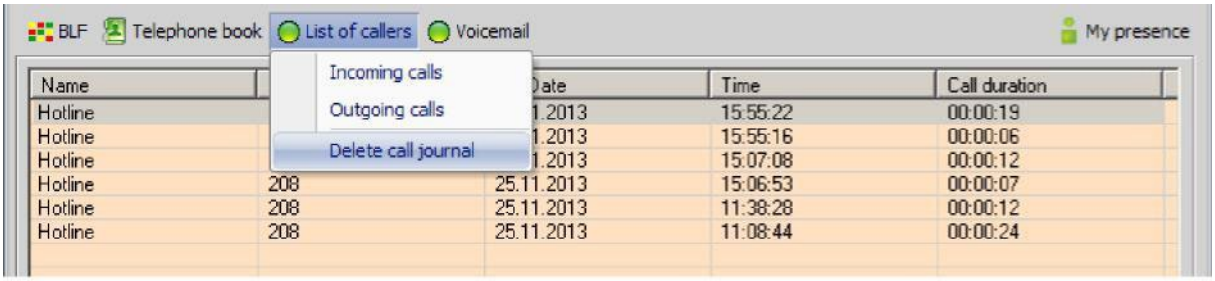
The following menu appears for system speed dial:



Right-click the selected entry to display the subscriber's speed dial number.

The list of callers pop-up menu offers the following options:

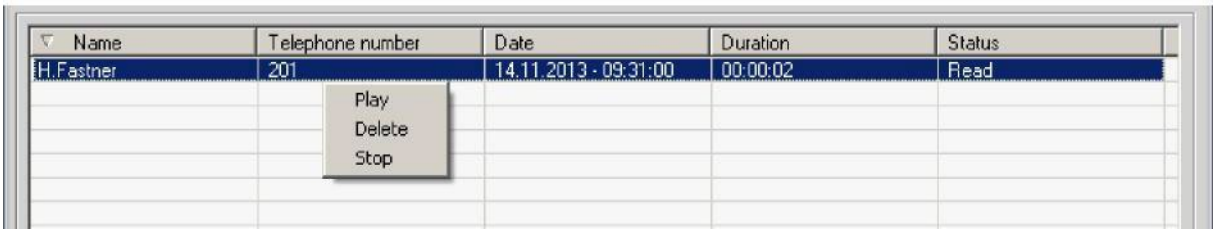
Switch list area to the display of the incoming calls
Switch list area to the display of the outgoing calls
Delete the entire call journal (incoming and outgoing calls)



Right-click the list of caller's area to delete an entry.

! **Note:** It is only possible to delete entries on certain telephone systems.

! **Important:** This requires a corresponding UC licence. This menu appears in the list area of the voicemail display:



You can listen to, stop and delete individual voicemails. Right-click a selected entry to see these options.

The 'Status' column flags voicemails as read or unread.

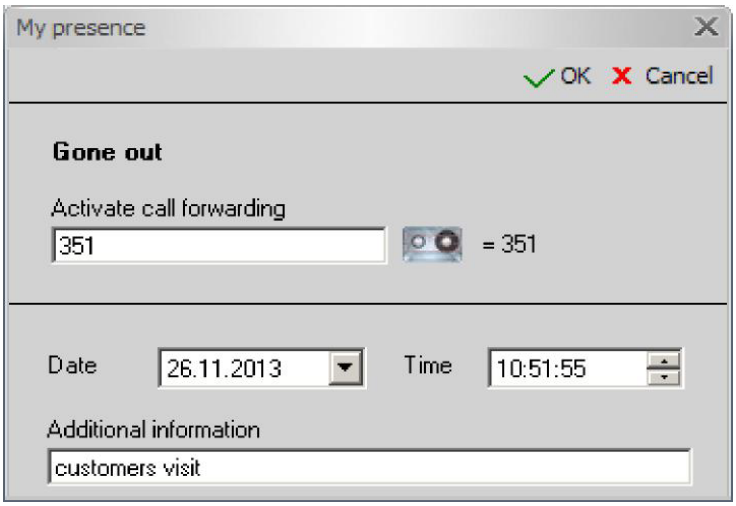
! **Important:** This requires a corresponding UC license.

5.10 Set my presence

Click ‘My presence' on the main window to set your own presence.

Your presence is displayed with the corresponding symbol on the button on the main window.

You can choose from a range of status options preset with different forwarding destinations and times. They can be changed at any time.



! Note: An input screen does not appear if you select ‘Office’.

! Important: This requires a corresponding UC license.

5.11 Set a presence

You have the option to set presence statuses for the subscribers from the telephone system. These are displayed on the busy lamp field with corresponding symbols.

They are as follows:

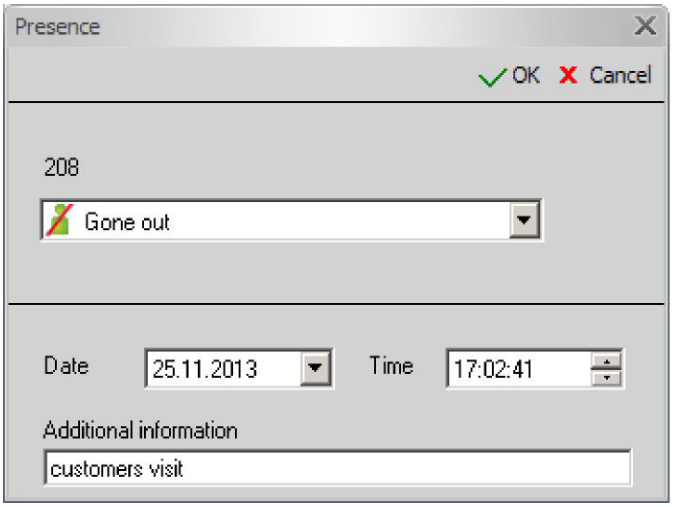
Office
Meeting
Sick
Break
Gone out
Holiday
Lunch
At Home

! **Important:** This requires a corresponding UC license.

The infotext of the corresponding entry on the BLF contains further information on the presence status of a subscriber.

Open the 'pop-up menu' and right-click an entry to set a presence.

Enter the subscriber's status along with the date, time and any additional information in the input screen.

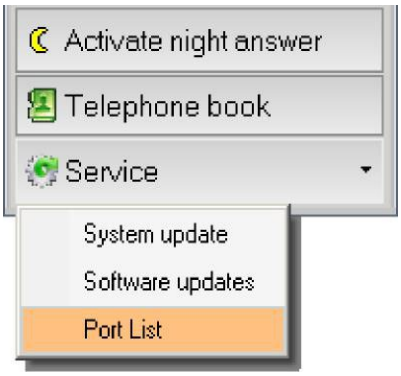


! **Note:** The individual presence statuses are preset by the software but can be changed if necessary.

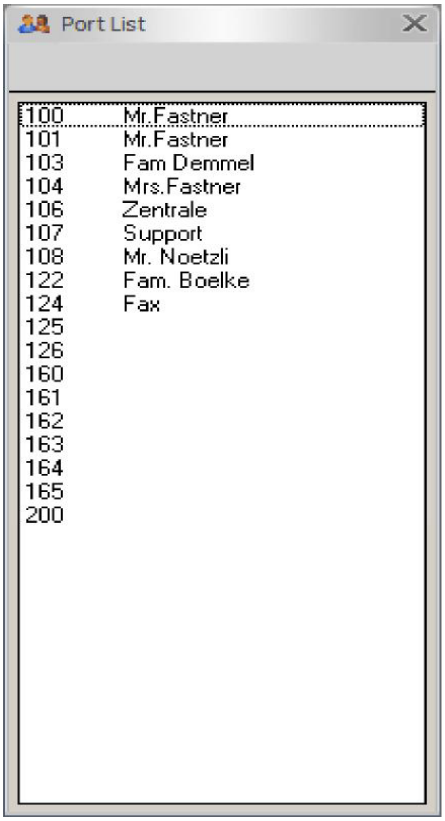
! **Important:** This requires a corresponding UC license.

5.12 Put entries from the port list on the BLF

Click the ‘Port list’ menu on the ‘toolbar’ to display your telephone system’s local port list.



This opens a window with your telephone system’s port list.

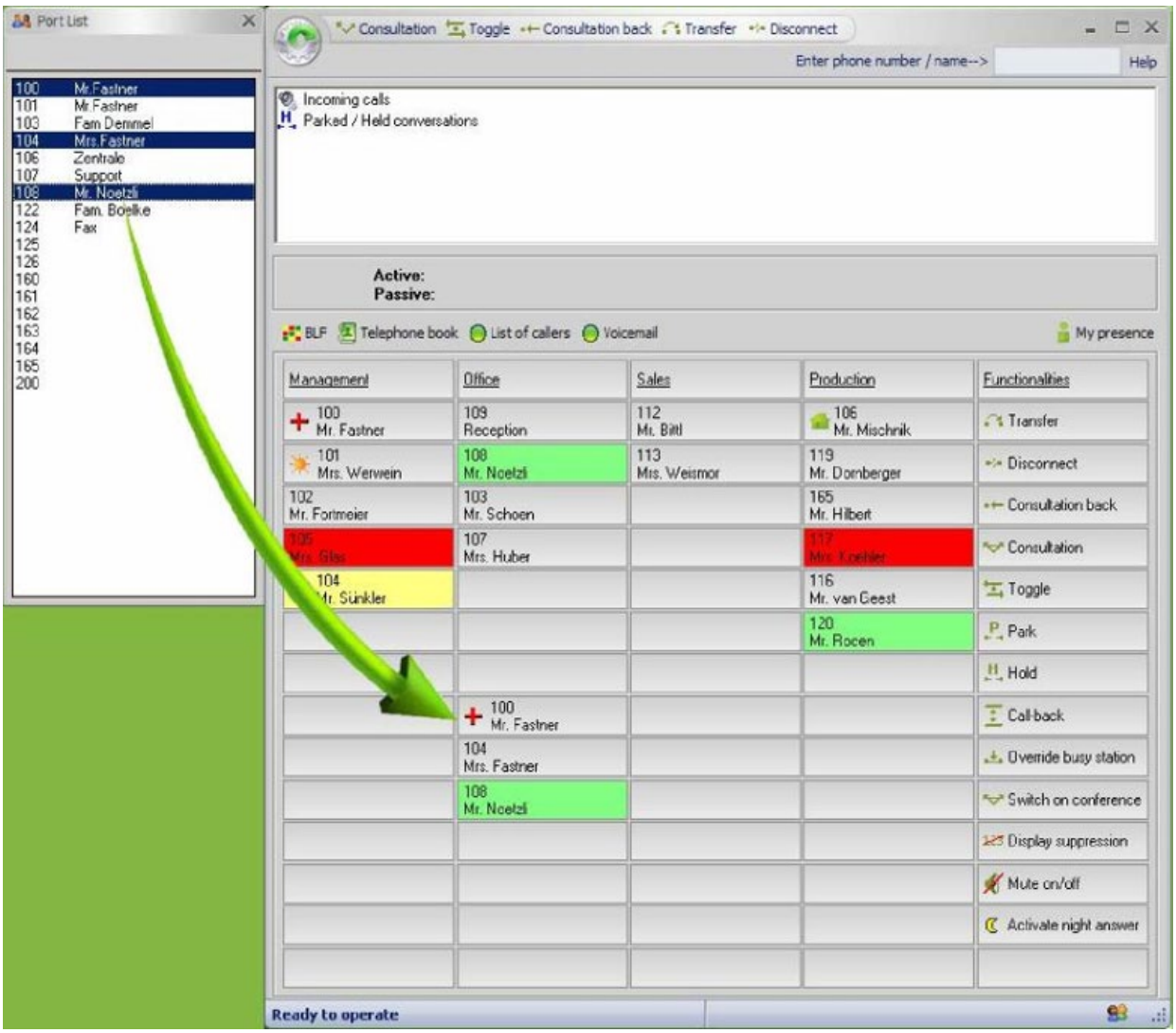


There are various options to transfer entries from the port list to the busy lamp field:

Click individual entries *
Select multiple individual entries (Ctrl+click) *
Select multiple consecutive entries (Ctrl+click) *

* You can also drag entries to the desired field on the busy lamp field using drag and drop.

! **Note**: Any existing entries are overwritten. The selected entries are arranged in order on the busy lamp field.

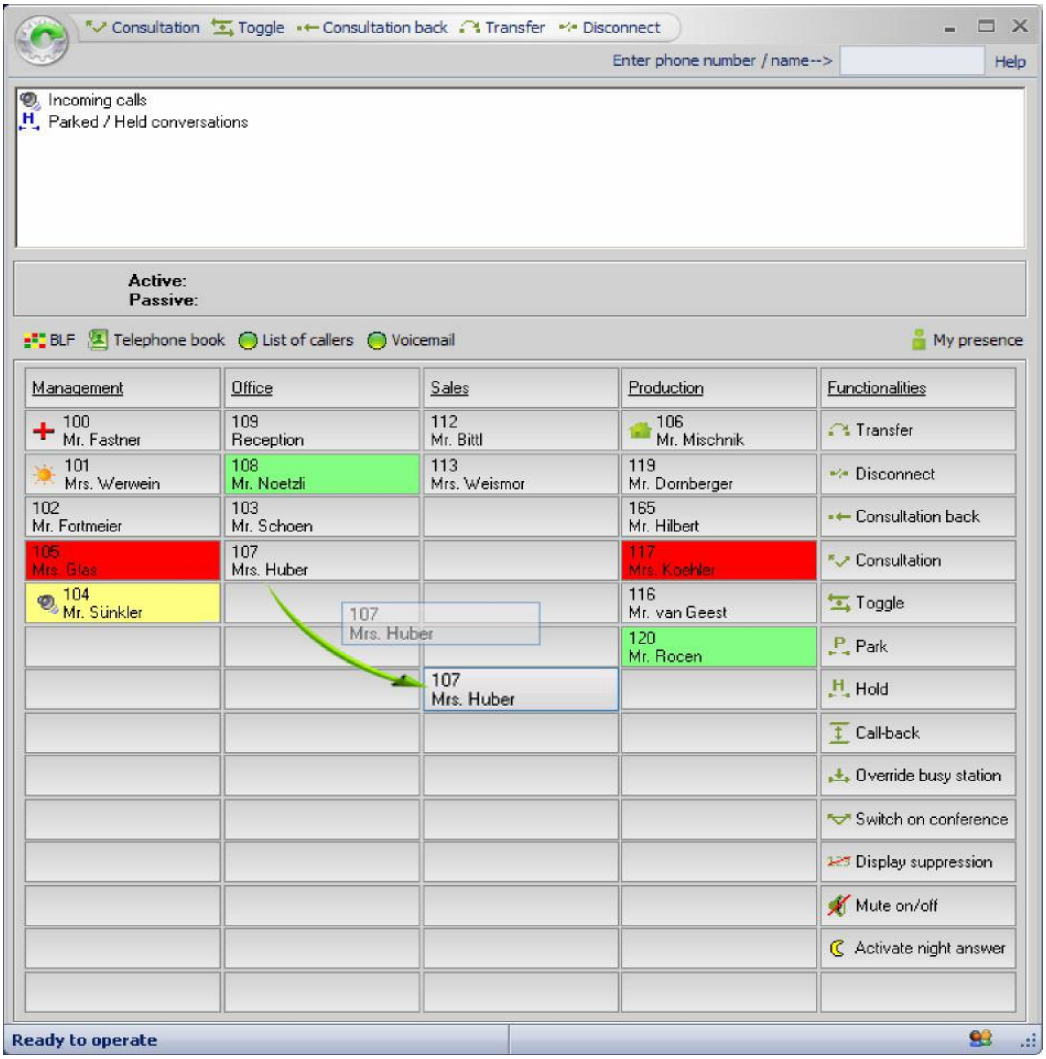


5.13 Move entries on the BLF

Drag & drop function

To move an entry on the Busy Lamp Field (BLF), you must select the corresponding entry (Shift + left mouse button) and move via drag and drop on selected a Busy Lamp Field (BLF).

This function is also available on the second BLF but not between the two windows (across).



! **Note**: Any existing entries are overwritten.