



# Bell Total Connect Call Dashboard

Quick reference guide

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# Welcome to the Bell Total Connect Call Dashboard

The Bell Total Connect Call Dashboard is a web-based client for receptionists and executive assistants that provides switchboard capability, contact directories and employees phone status. This quick reference guide provides a brief overview of the functionality available from the Call Dashboard.

## 1. Getting started

If you have subscribed to the Call Dashboard feature, it is accessible from the Overview page of the Bell Total Connect portal ([totalconnect.bell.ca](http://totalconnect.bell.ca)).

### 1.1 Minimum system requirements

The following operating systems can support the dashboard:

- Mac OS 10.8 (Mountain Lion)
- Mac OS 10.9 (Mavericks)
- Mac OS 10.10 (Yosemite)
- Windows 7
- Windows 8/8.1
- Windows 10 (Classic view only)
- Citrix
- Java, Runtime Environment (version 7 and up)
- Microsoft Outlook (only required if using the Outlook contact directory option)

You must use one of the following web browsers:

- Internet Explorer (version 9 or higher for optimal performance)
- Firefox
- Chrome
- Safari

Note: The architecture of the Java browser plug-ins should match that of the installed Java Runtime Environment (JRE). When using a 32-bit browser, a 32-bit JRE should be used; when using a 64-bit browser, a 64-bit JRE should be used. If you have both 32-bit and 64-bit browsers, you need 32-bit and 64-bit JREs.

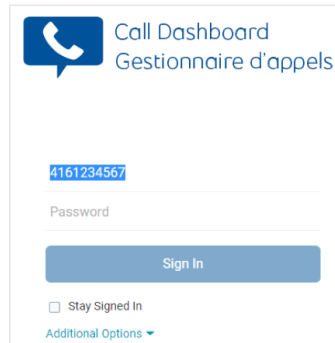
The minimum required screen resolution for the receptionist client is 1024 x 768 pixels.

The Call Dashboard does not support signing in with multiple user credentials on the same device at the same time.

For Mac computers, the Call Dashboard is compatible with Chrome and Safari.

## 1.2 Logging into the Call Dashboard

Select the **Access Call Dashboard** link from the Overview page in the Bell Total Connect portal and enter the same username and password you use to log into the portal.



The screenshot shows the login interface for the Call Dashboard. At the top left is a blue icon of a telephone handset inside a speech bubble. To its right, the text reads "Call Dashboard" and "Gestionnaire d'appels". Below this is a text input field containing the phone number "4161234567". Underneath is a "Password" field. A blue "Sign In" button is positioned below the password field. At the bottom left, there is a checkbox labeled "Stay Signed In" and a link for "Additional Options" with a downward-pointing arrow.

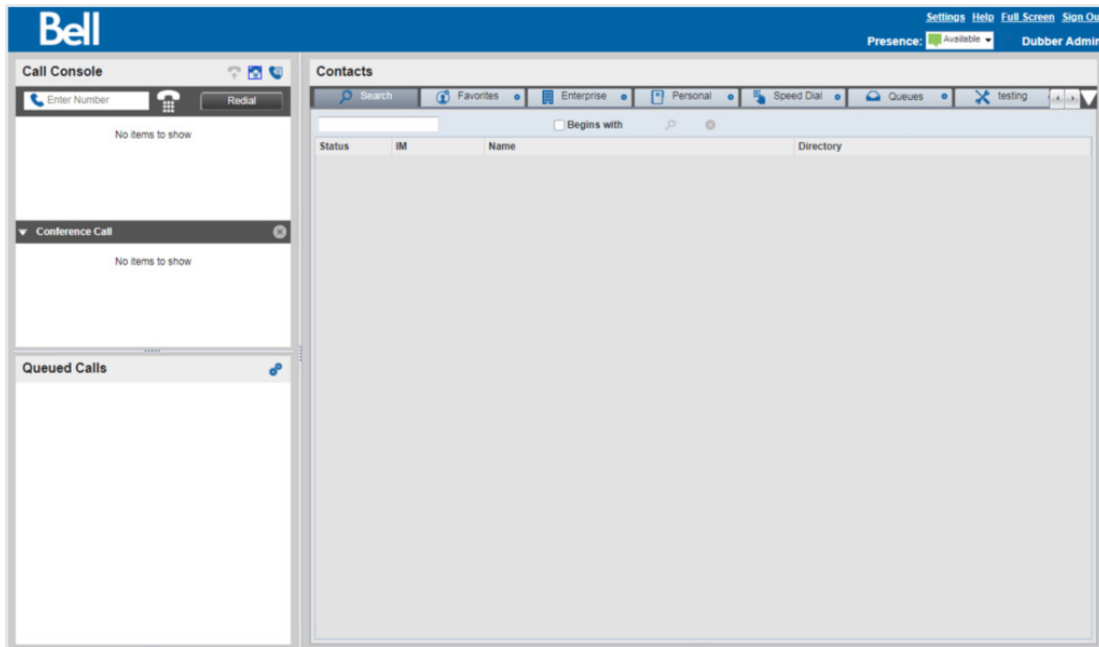
On initial login, the application automatically downloads a Java Network Launching Protocol (JNLP) file. You need to right-click the JNLP file and run it using the Java Web Start launcher. You may not be prompted to run the Java plug-in on subsequent logins. If you choose not to run the Java plug-in, certain features in the sections below will not work.

Mac users need to take additional steps to run the JNLP file.

1. Go to **System Preferences > Security & Privacy > General** and click **Open Anyway**.
2. Click **Open** when you see the next prompt.
3. Click **Run**.
4. Go to **Finder > Utility > Keychain Access**.
5. Double-click the **certificate 127.0.0.1**.
6. In the **When using this certificate** drop-down list, select **Always Trust**.
7. Log out and log back into the Call Dashboard. The JNLP should now work on both Chrome and Safari.

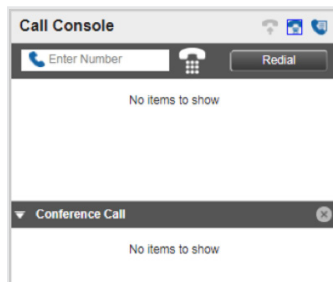
## 2. Navigating the Call Dashboard

The following section outlines key elements of the Call Dashboard.



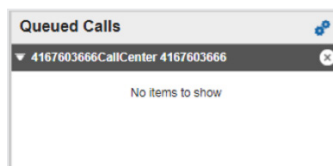
### 2.1 Call Console

The Call Console is where you manage incoming calls. For more information on managing calls, see section 3 of this guide.



### 2.2 Queued calls

The Queued Calls section displays all your queues. For more information about managing queues, see section 5 of this guide.



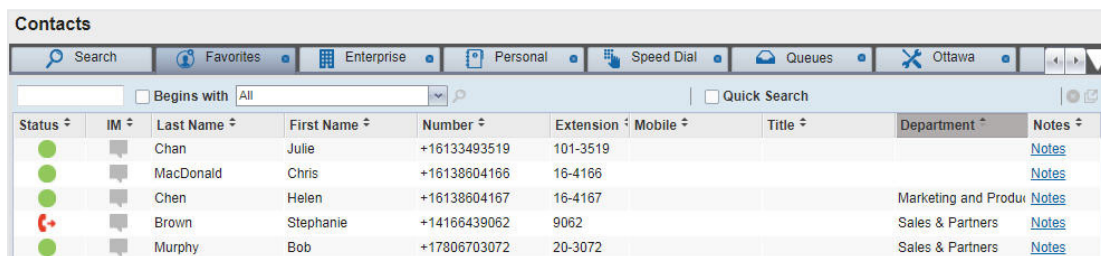
## 2.3 Call statuses

The following statuses are displayed beside each call in the Call Console.

Call status	Display
Active	Active
On hold	Held (time)
On hold (remote)	ActiveHeld (time)
Ringing in (remote)	Incoming
Ringing in (local)	Incoming Local
Ringing out	Outgoing
Active (in conference)	Active
On hold (in conference)	Held
Ringing in (recalled call)	Recalled
Parked call	Parked (<DN>)

## 2.4 Contacts

The Contacts section lists your available contact directories (such as Favourites or Enterprise), as well as the contacts associated with each directory. The information displayed in this panel depends on the directory you chose and the way you have set up your directories. For more details on using and managing directories, refer to section 3 of this guide.



The screenshot shows the 'Contacts' section of a software interface. At the top, there are navigation tabs for 'Search', 'Favorites', 'Enterprise', 'Personal', 'Speed Dial', 'Queues', and 'Ottawa'. Below the tabs, there is a search bar with a dropdown menu set to 'All' and a 'Quick Search' button. The main area contains a table of contacts with the following columns: Status, IM, Last Name, First Name, Number, Extension, Mobile, Title, Department, and Notes. The table lists five contacts: Chan (Julie), MacDonald (Chris), Chen (Helen), Brown (Stephanie), and Murphy (Bob). Each contact has a status indicator (green dot or red plus) and a 'Notes' link.

Status	IM	Last Name	First Name	Number	Extension	Mobile	Title	Department	Notes
●		Chan	Julie	+16133493519	101-3519				<a href="#">Notes</a>
●		MacDonald	Chris	+16138604166	16-4166				<a href="#">Notes</a>
●		Chen	Helen	+16138604167	16-4167			Marketing and Produ	<a href="#">Notes</a>
+		Brown	Stephanie	+14166439062	9062			Sales & Partners	<a href="#">Notes</a>
●		Murphy	Bob	+17906703072	20-3072			Sales & Partners	<a href="#">Notes</a>

## 2.5 Common controls and keyboard shortcuts

General	
Key	Action
Esc	Exit from the active window or cancels the changes.
/	Clicks the <b>Dialler</b> text box.
?	Clicks the <b>Search</b> text box.
S or s	Clicks the <b>Settings</b> link.
B or b	Clicks the <b>Back to Application</b> link.
R or r	Clicks the <b>Call History</b> button.
H or h	Clicks the <b>Help</b> link.
SHIFT + L	Clicks the <b>Sign Out</b> link.

Call Console	
Key	Action
1 to 9	Selects a call in the Call Console.
SPACEBAR	Answers selected call.
<PERIOD>	Ends selected call.
SHIFT + 1 to 9	Answers selected call.
SHIFT + 1 to 9	Selects a ringing call and clicks <b>Hold</b> . Puts selected call on hold.
SHIFT + 1 to 9	Selects a ringing call and clicks <b>Retrieve</b> .

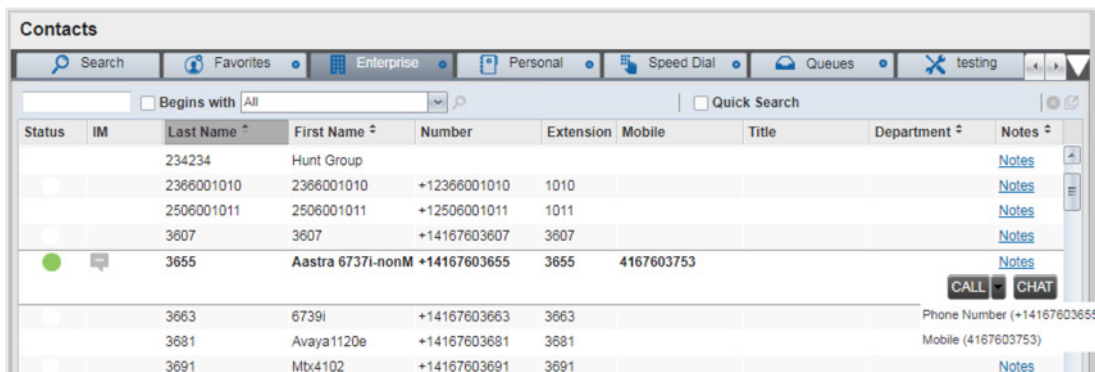
Contacts panel	
Key	Action
Up or down arrow	Goes one entry up or down in the contact list.
Page up or down	Scrolls the next or previous page in the contact list.

## 3 Initiating and receiving calls

### 3.1 Calling a contact

You can call a contact by selecting an entry from any of the available directories in the dashboard. To call one of your contacts:

1. In the Contacts panel, select one of the available directory tabs (e.g., Favourites, Personal).
2. Select the contact you wish to call.



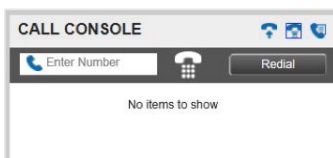
3. Click the **CALL** drop-down button beside the selected contact and select **Phone Number**.

Note: To dial the contact's mobile number, click the **CALL** drop-down button and select **Mobile**.

### 3.2 Dialling a number

To dial a number not stored in one of your directories:

1. In the Call Console, type the number you wish to call in the Enter Number text box using either the keys on your keyboard or the digits on the dial pad.



2. Press **ENTER** or click the **Dial** icon (☎) to start the call.



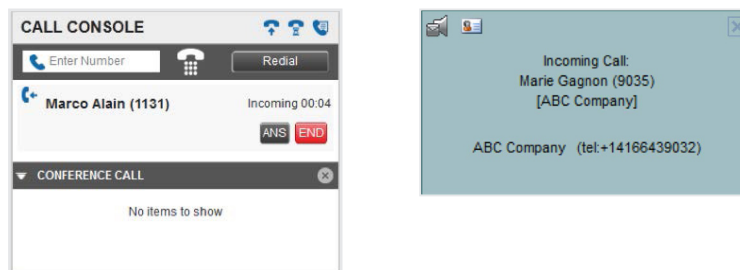
### 3.3 Answering a call

To answer an incoming call:

1. Select the call you wish to answer from the Call Console.
2. Click the **ANS** button to answer the call.

You can also answer by clicking on the pop-up notification of an incoming call. The pop-up appears even if the browser is minimized.

Note: The pop-up notification feature requires the Java plug-in.



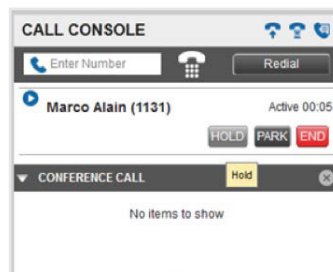
### 3.4 Placing calls on and off hold

To place an incoming call on hold:

1. In the Call Console, select the call you wish to place on hold.
2. Click **HOLD**.

To take a call off hold:

1. In the Call Console, select the call you wish to answer.
2. Click **ANS**.



### 3.5 Ending a call

To release a call and remove it from the Call Console:

1. In the Call Console, select the call you wish to end.
2. Click **END**.

### 3.6 Group Call Park

To park a call so that any member of your Call Park group can answer:

1. In the Call Console, select the call you wish to park.
2. Click **PARK**.

Note: Call Park groups are established in the Bell Total Connect portal.

### 3.7 Consultative transfer

A consultative transfer allows the person transferring the call to speak to the intended recipient before transferring the call to them. Consultative transfers can be completed while the call is active, on hold or incoming.

To perform a consultative transfer:

1. If you are transferring an active call, place it on hold by selecting it in the Call Console and clicking **HOLD**.
2. Call the person you wish to transfer the call to. This new call appears in the Call Console.



3. When the recipient accepts your call, notify them that you wish to transfer a call to them.
4. In the Call Console, select the original call that you put on hold, and then click **Transfer (TXR)**. The calls are now connected and they're removed from your Call Console.

### 3.8 Blind transfers

A blind transfer automatically transfers the call without notifying the intended recipient. Blind transfers can be completed while the call is active, on hold or incoming.

To perform a blind transfer to a contact:

1. In the Call Console, select the call you wish to transfer.
2. In the Contacts panel, click the tab you wish to select a contact from.
3. Click on the destination contact to expand it, revealing additional buttons. Click on the **Transfer** button. Alternatively, you can drag the call onto the destination contact and click **Transfer** for that contact.
4. The call is now transferred and removed from the Call Console.


Note: If the contact is busy, the call is redirected to their voicemail. If their voicemail is disabled, the call is camped or put on hold. For more information about camped calls, see section 3.11. Transfer recall settings are managed in the Bell Total Connect portal.

To perform a blind transfer to any other number:

1. In the Call Console, select the call you wish to transfer.
2. In the text box at the top, enter the phone number of the person you wish to transfer the call to and click the **Transfer** button.
3. The call is now transferred and removed from your Call Console.

### 3.9 Transferring to voicemail

To transfer an incoming call directly to a contact's voicemail:

1. In the Call Console, select the call you wish to transfer to a contact's voicemail.
2. In the Contacts panel, click the tab from which you wish to select a contact.
3. Click on the destination contact to expand it, revealing additional buttons.
4. Click on the **Transfer to Voicemail** button (  ) to transfer the call.

Note: This option is only available if the contact has enabled their voicemail.

### 3.10 Busy camp

The Busy Camp feature allows you to create a waiting list that holds calls for a busy line. Calls are automatically directed to the contact's line when it becomes available.

To place a call in camp mode:

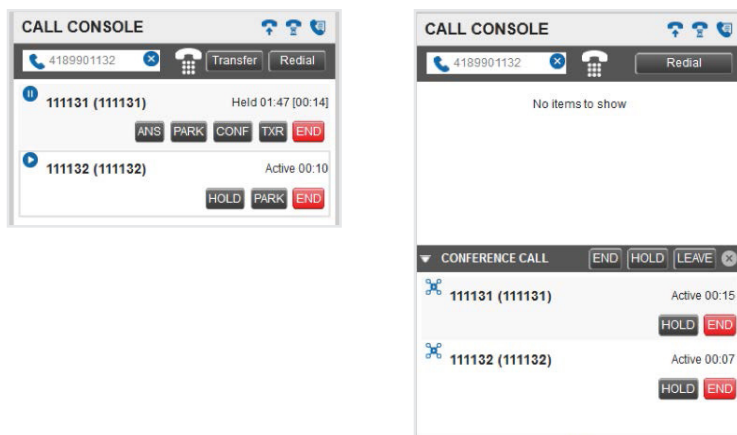
1. In the Call Console, select the call you wish to camp.
2. In the Contacts panel, click the tab from which you wish to select a contact.
3. Click on a busy or ringing contact from one of the directories to expand it, revealing additional buttons.
4. Click the **CAMP** button.

Notes: Once the call is camped, it is removed from the Call Console. If the call expires before it is answered, the call reappears in the Call Console. For the Camp feature to work, you need to enable the Call Transfer Recall in the Bell Total Connect portal and configure it (e.g., set the amount of time you want camped callers to wait on hold before the call is directed back to your line).

### 3.11 Three-way calls

To set up a three-way call:

1. In the Call Console, select one of the calls you wish to combine.
2. Move your mouse over the other call and click the **CONF** button.
3. The three-way conference is now established and the connected calls are moved to the Conference Call panel.




You can temporarily leave the conference by placing your phone on hold:

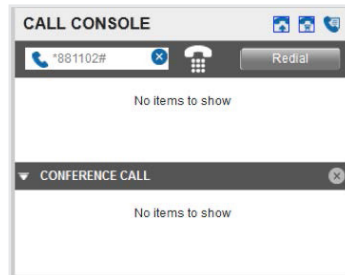
1. Expand the Conference Call panel.
2. Click **HOLD**.
3. To resume a conference that's on hold, click **Resume Conference**.

To leave a three-way call without ending the conference expand the Conference Call panel, and click **LEAVE**. To end the three-way call, click **END** instead.

### 3.12 Auto-answer

The Auto-answer feature lets your phone automatically answer calls.

To enable the Auto-answer feature, click the **Auto-answer** icon (  ) from the Call Console. Once enabled, the icon becomes blue. When Auto-answer is enabled, your phone does not ring (this applies to both incoming calls and Click-to-Dial calls).



### 3.13 Call barge-in

Call barge-in lets you join a contact's call. This is useful when you want to enter a call that is already established between two other people.

To barge in on a call:

1. Expand the Group/Enterprise or Favourites directory.
2. Click the target contact and click the **Barge-in** button. The contact's status must be Busy.

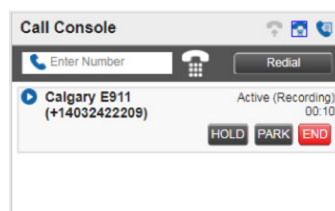
You enter an ongoing call, establishing a three-way conference. The calls appear in the Conference Call panel. You can now perform any conference operation on the call.

Note: This functionality is only available if your administrator has assigned this service to you.

### 3.14 Recording calls

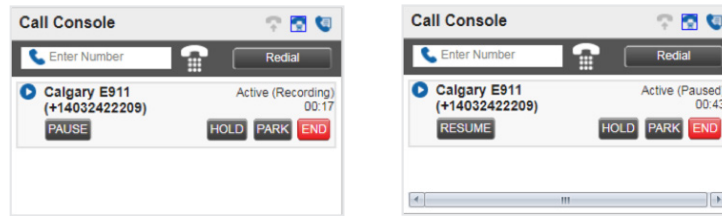
#### 3.14.1 Recording all calls

When a call is initiated, the call status is shown as Active (Recording).



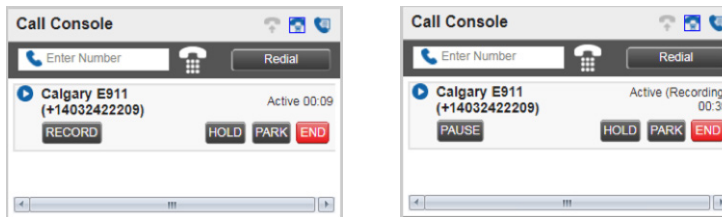
### 3.14.2 Recording all calls with pause/resume functionality

When a call is initiated, its call status is shown as Active (Recording) and the PAUSE or RESUME button appears. You can click the PAUSE or RESUME button to pause or resume the call recording.



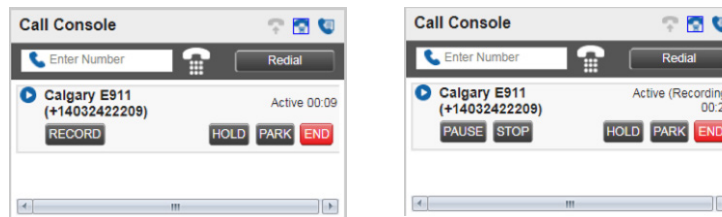
### 3.14.3 Recording all calls with the option to keep the recording

When a call is initiated, its call status is shown as Active and the RECORD button appears. Click the RECORD button to keep the current recording. The call is recorded from the beginning, and you have to click the button before the end of the call to keep the recording. You'll then have the ability to pause or resume the recording.



### 3.14.4 Recording calls on demand with start/stop functionality

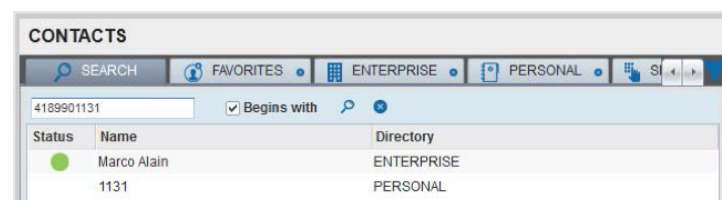
When a call is initiated, its call status is shown as Active and the RECORD button appears. Click the RECORD button to start recording. Once the recording is started, you'll have the ability to pause, resume or stop the recording.



## 4 Using directories

### 4.1 Searching directories

The Search tab contains all the users in your dashboard. You can search for any user from your speed dial entries, from your personal contacts, within the enterprise or in the Outlook and LDAP directories (if enabled).

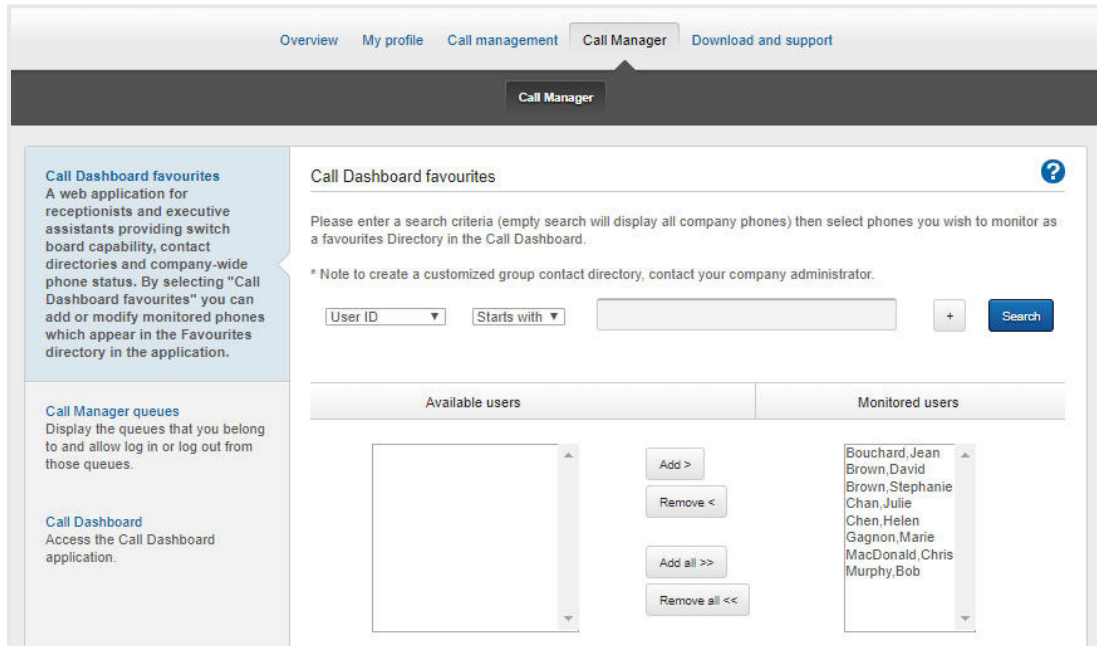


You can initiate a call by clicking on a contact. If the contact is in the enterprise directory, you see the status of their line and you can cut in if they're already on a call.

## 4.2 Favourites

If you want the Favourites tab to display entries, you first need to add users from the Bell Total Connect portal.

1. Log in to the portal.
2. Click on the **Call Manager** tab.
3. Select **Call Dashboard favourites** from the menu on the left.
4. Add any users that you want to appear in the Favourites tab.



## 4.3 Enterprise directory

The Enterprise tab contains the contacts from your enterprise directory. The following information is displayed for each contact (if applicable):

- Call state
- First and last name
- Phone number and extension
- Mobile number
- Department
- Notes

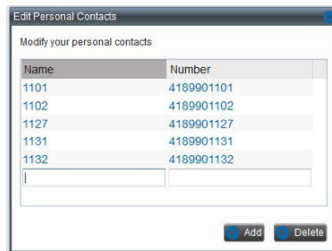
## 4.4 Personal directory

The Personal tab contains your personal contacts. A name and a phone number identify each contact.

#### 4.4.1 Adding a personal contact

To add a personal contact:


1. In the Personal tab, click **Edit** (  ). The Edit Personal Contacts screen appears.
2. Click **Add**. A new line is added below the existing entries, allowing you to define a new entry.



3. In the Name text box, enter the contact's name or description.
4. In the Number text box, enter the phone number of the contact.
5. To save the changes, click **Add**.

#### 4.4.2 Deleting a personal contact

To delete a personal contact:


1. In the Personal tab, click **Edit** (  ). The Edit Personal Contacts screen appears.
2. Select the entry you'd like to delete and click **Delete**.

### 4.5 Speed dial directory

The Speed Dial tab displays the entries from the Speed Dial feature in the Bell Total Connect portal. You can edit any of the entries.

#### 4.5.1 Adding a speed dial entry

To add a speed dial entry:

1. In the Speed Dial tab, click **Edit** (  ). The Edit Speed Dials screen appears.
2. Click **Add**. A new line is added below the existing entries, allowing you to define a new entry.
3. From the Code drop-down list on the left, select a speed-dial code.
4. In the Phone Number text box, enter the phone number you wish to assign to the code.
5. In the Description text box, enter a description that allows you to identify the entry.
6. To save the entry, click **Add**.

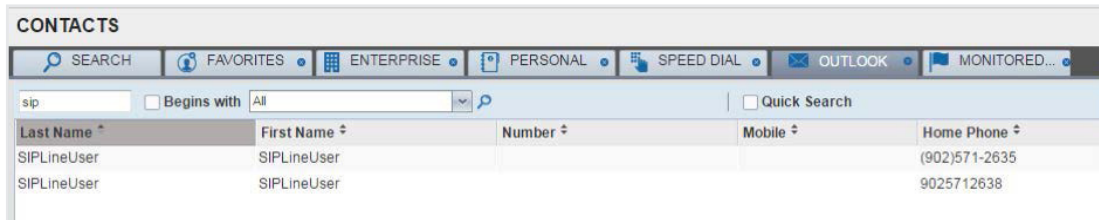
#### 4.5.2 Deleting a speed dial entry

To delete a speed dial entry:

1. In the Speed Dial tab, click **Edit** (  ). The Edit Speed Dials screen appears.
2. Select the entry you wish to delete and click **Delete**.

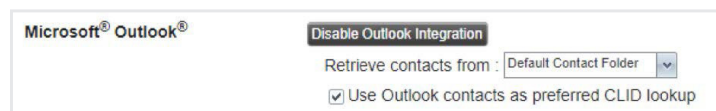
## 4.6 Outlook directory

When enabled, this directory synchronizes your Outlook contacts with the receptionist client. A CLID lookup can then be done using the Outlook directory. You can also search for a contact using the directory and transfer calls to an Outlook contact.



Last Name	First Name	Number	Mobile	Home Phone
SIPLineUser	SIPLineUser			(902)571-2635
SIPLineUser	SIPLineUser			9025712638

To enable the Outlook directory, in the Call Dashboard, go to **Settings > Plug-ins** and click **Enable Outlook Integration**.



Note: The Java plug-in needs to be enabled to use this feature.

When using Outlook integration with Microsoft Outlook 2010 or Outlook 2013 (32- or 64-bit edition), make sure Outlook is running before the Call Dashboard is launched; otherwise, Outlook integration will not work.

## 4.7 LDAP directory

The Call Dashboard allows you to connect to your local LDAP server. To configure the LDAP server:

1. Navigate to **Settings > Plug-ins**.
2. Enable LDAP Integration.
3. Enter the connection details of the LDAP server.

Once connected, you can search for LDAP contacts from the Call Dashboard search tab.

Note: The Java plug-in needs to be enabled to use this feature.

## 4.8 Monitored contacts

When monitoring is started on a contact in the Enterprise directory, that contact is added to the Monitored contact directory. The directory is only visible if there are dynamically monitored contacts. To monitor a contact, double-click on the status column of an Enterprise contact.


Note: You can dynamically monitor up to 100 contacts at once.



## 4.9 Managing directories

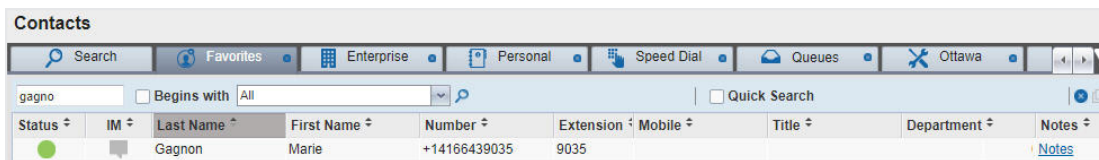
### 4.9.1 Contact states

The state of a contact is represented by an icon located to the left of the contact's name. This includes the state of the contact's phone line and the status of features such as Call Forward All Calls or Do Not Disturb. The following table lists the possible contact states:

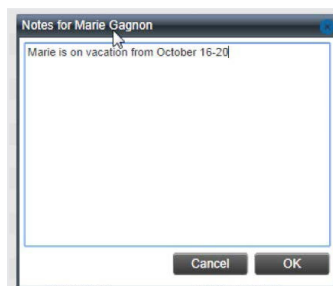
Icon	Status	DND	CFA	Call State
	On a call	N/A	N/A	Active call
	Ringing	N/A	N/A	Ringing call, no active calls
	Forwarding calls	N/A	On	No active calls
	Do not disturb	On	Off	No active calls
	Available	Off	Off	No active calls
	Unknown	N/A	N/A	N/A

### 4.9.2 Contact notes

You can save personalized notes for each of your contacts, helping you to remember key information about them. To add a note for a specific contact, click on the link that appears in the far-right column of the directory interface.



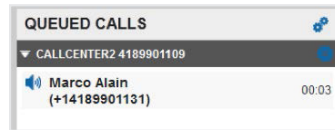
Clicking the link displays the following window, where you can enter and save content.



## 5 Using queues

With Bell Total Connect, your company can have multiple main numbers, and callers to those numbers are held in queues until answered by a receptionist. For example, you may have an advertised number for your Sales division, but a different advertised number for your Support division.

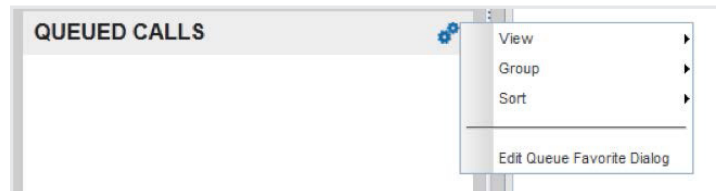
The Queued Calls section is where all your queues are displayed. All incoming calls appear under the appropriate queue.



### 5.1 Displaying queued calls

For a queue to appear in the Queued Calls panel, you must first select it:

1. In the Queued Calls panel, click the Options icon (  ) and select the Edit Queue Favourite Dialog option.



2. From the new window, check each queue you wish to monitor.



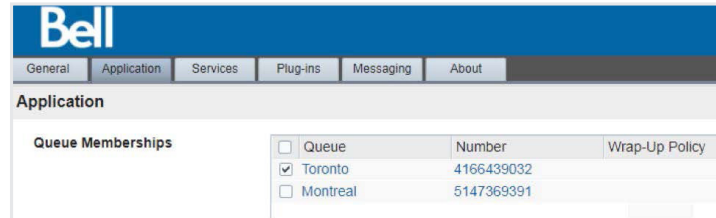
3. Once you have finished selecting the queues you wish to monitor, click **Save**. The selected queues appear in the Queued Calls panel.

Note: The Group and Sort options cannot be configured at this time.

## 5.2 Receiving calls from queues

To start or stop receiving calls from queues:

1. Click on **Settings** in the top-right corner.
2. Click on the **Application** tab.
3. To join a specific queue, check the box beside the queue.

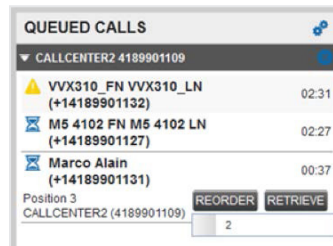


4. To join all queues, check the box in the column header.
5. To save your changes and return to the main page, click **Back to Application** in the top-right corner.

## 5.3 Changing position of calls

To change the position of a call in the Queued Calls panel:

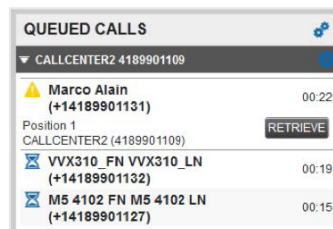
1. Select the call you wish to move from the Queued Calls panel.
2. Click the **Reorder** button. A drop-down list appears.
3. In the drop-down list, select the new position of the call in the queue.



## 5.4 Retrieving a call from the queue

With the Call Manager feature, you can retrieve a call from any queue and send it to your phone. To retrieve a call from a queue:

1. In the Queued Calls panel, select the call you wish to retrieve.
2. Click on the **Retrieve** button to send the call to your phone.
3. Once retrieved, the call appears in the Call Console panel.



## 5.5 Transferring a call to a queue

Any call appearing in the Call Console panel can be transferred to a queue. To transfer a call to a queue:

1. In the Call Console panel, select the call you wish to transfer to a queue.
2. In the Queued Calls panel, select the queue where you wish to transfer the call.
3. Click **Transfer**.
4. Once transferred, the call is removed from the Call Console panel. Alternatively, you can drag the call to the destination queue and click **Transfer**.





## 5.6 Transferring between queues

To transfer a call to another queue:

1. In the Queued Calls panel, select the call you wish to transfer to another queue.
2. In the Contacts panel, expand the **Queues** tab.
3. Select the destination queue and click the **Transfer** button for that queue. The call is transferred and removed from the original queue.

## 5.7 Queued call statuses

The chart below details the statuses that can be displayed beside each of the calls in the Queued Calls panel.

Icon	Status	DND
	Bounced	The call has been bounced.
	Re-ordered	The position of the call in the queue has been changed.
	Waiting	The call is queued, waiting to be answered.
	Announcement	An announcement is being played to the caller.

## 6 Instant messaging & presence (IM&P)

This feature adds instant messaging and presence capabilities to existing directories in the Contacts header. Once a Call Dashboard user signs in to the application, the presence state of the user is set to “Available”.

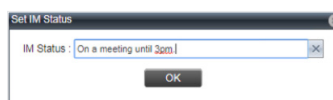


Note: In the offline state, instant messaging capabilities are disabled. The user does not receive any presence updates or instant messages and the presence of their contacts are hidden.

### 6.1 IM&P status message

To set an IM&P status message:

1. Click the **Edit** button (  ) next to the Presence box. The Set IM Status dialog box appears.



2. Enter your message and then click **OK**.
3. To see your message, move the mouse over the **Edit** button. A tool tip with your presence message appears.
4. To see your contact's status message, move the mouse over that contact's presence status. A tool tip with the presence message appears, if there is any.

## 6.2 Subscribing to a contact

To subscribe to a contact, you need to click on the contact's grey instant messaging icon and select the **Yes** button. The contact must confirm your request.



## 6.3 Receiving a request to add a contact

You can receive requests from other contacts. You have the ability to accept, deny or ignore the requests on the message screen.

## 6.4 Unsubscribing from a contact

To unsubscribe from a contact, you need to click on a contact's instant messaging icon. A confirmation prompt appears.



## 6.5 IM&P directory

This directory shows all the contacts you have subscribed to, along with their instant messaging presence states. You can chat with these contacts by clicking the chat button on the contact.

When you click on a chat window (or a message is received from another IM user), the IM window appears at the bottom-right corner of the application window. On the chat window you have the option to:

- Click on the **+** symbol and add another user to start a group chat
- Click the **call** button to call the user
- Click the **down arrow** to pop out the chat window from the receptionist interface



## 7 Additional tools

### 7.1 Call logs

This feature allows your system to store up to 60 calls (20 dialled, 20 received and 20 missed calls). The newest calls are shown at the top – older calls are deleted once the limit of 20 is reached.

To view your call log, click on the **Call History** button (  ).