



Nortel Communication Server 1000

# IP Phone 2004

## Call Center User Guide





# Revision history

## July 2006

Standard 5.00. This document is up-issued to support Nortel Communication Server 1000 Release 4.5. LOGOs and trademark information was updated. URL for document feedback added to back page.

## August 2005

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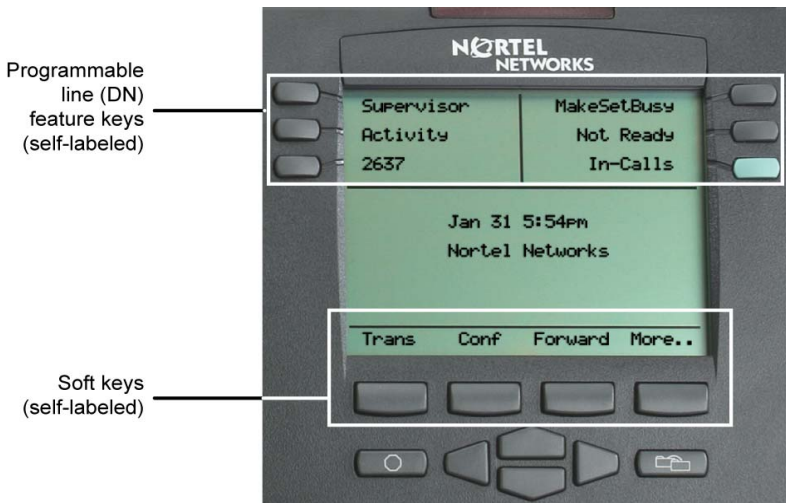
# About the phone

The Nortel IP Phone 2004 brings voice and data to the desktop by connecting directly to a Local Area Network (LAN) through an Ethernet connection.

**Note 1:** All features are not available on some telephones. Consult your system administrator to verify which features are available for your use.

**Note 2:** In this guide, programmable line (DN)/feature key labels display beside the key, and soft key labels display directly above the key. Figure 1 shows key labels.

**Figure 1: Programmable line (DN)/feature keys and soft key labels**



## Basic features

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The IP Phone 2004 supports the following features:

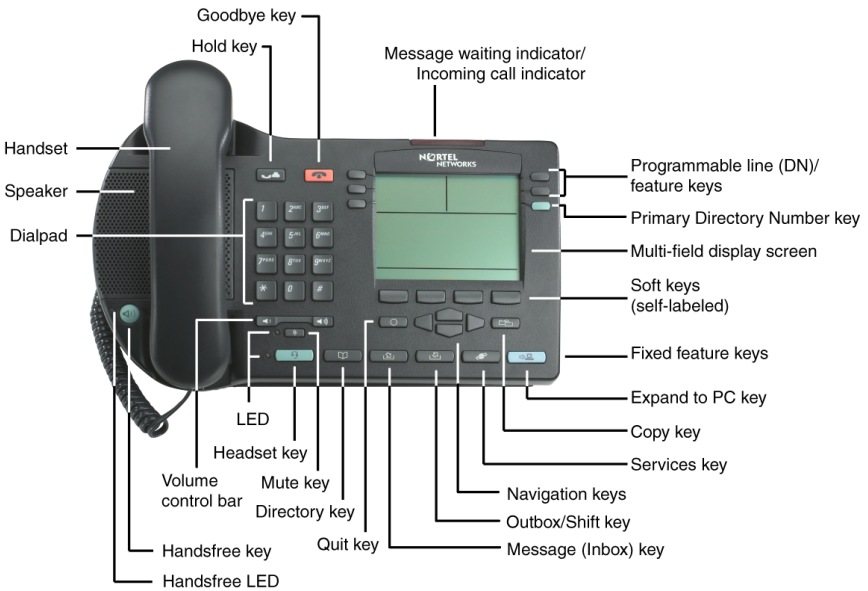
- 12 programmable feature keys: six (physical) user-defined feature key labels and six lines/features accessed by pressing the **Shift** key
- four soft keys (self-labeled) providing access to a maximum of 10 features

**Note:** Some IP Phone 2004 phones are not configured to support soft key functionality. Consult your system administrator.

- multi-field LCD display screen
- speaker for on-hook dialing or on-hook listening
- volume control bar for adjusting ringer, speaker, handset, and headset volume
- six specialized fixed keys:
  - Quit
  - Directory
  - Message (Inbox)
  - Outbox/Shift
  - Services
  - Expand to PC
- four call processing fixed keys:
  - Hold
  - Goodbye
  - Handsfree
  - Mute
- shared LAN access with a PC
- headset jack with On/Off key
- automatic network configuration
- hearing-aid compatibility

Figure 2 shows the IP Phone 2004.

**Figure 2: IP Phone 2004**



## Telephone controls

**Note:** Some IP Phone 2004 phones are shipped with optional key caps installed. Text in parenthesis indicates labels appearing on the key caps. For example, (Services).



Use the **Volume control** bar to adjust the volume of the ringer, handset, headset, speaker, and the Handsfree feature. Press the right side of the rocker bar to increase volume, the left side to decrease volume.

2260



The green **InCalls** key is the primary DN key located at the bottom right-side of the LCD display screen.

CallWait



**Programmable line (DN)/feature keys** are extra DNs or feature keys used to access additional features.

2493



A steady LCD light beside a line (DN) key indicates that the line is active. A flashing LCD indicates that the line is on hold.

CallWait



A steady LCD light beside a feature key indicates that the feature is active. A flashing LCD indicates that the feature is being programmed.



**(Goodbye)**

Use the **Goodbye** key to terminate an active call.



**(Hold)**

Press the **Hold** key to put an active call on hold. Press the line (DN) key beside the flashing LED indicator to return to the caller on hold.



**(Msg/Inbox)**

Press the **Message (Inbox)** key to access your voice mailbox.



Use the **Navigation** keys to scroll through menus and lists appearing on the LCD display screen.



Press the **Services** key and use the navigation keys to access the following items:

- Telephone Options:
  - Volume adjustment
  - Contrast adjustment
  - Language
  - Date/Time
  - OnHook Default Path
  - Call Timer
  - Display diagnostics
  - Local DialPad Tone
  - Ring type
  - Change feature key label
  - Set Information
- Password Admin:
  - Station Control Password
- Display Network Diagnostics Utilities

**Note:** Only your system administrator or service provider can use Display Network Diagnostics Utilities to perform Internet diagnostics.
- Virtual Office Login and Virtual Office Logout (if Virtual Office is configured)
- Test Local Mode and Resume Local Mode (if Media Gateway 1000B is configured)

**Note:** Press the **Services** key to exit from any menu or menu item.

- The **Password Admin** menu may not be available on your IP Phone 2004. Consult your system administrator.



Press the **Headset** key to answer a call using the headset or to switch a call from the handset or handsfree to the headset.



Press the **Speaker** key to activate handsfree. The speaker LED indicator lights to indicate when handsfree is active.



**(Shift)**

Press the **Outbox/Shift** key to toggle between two feature key pages and to access an additional six lines/features and an additional 24 lines on the Nortel IP Phone KEM.



**(Directory)**

Press the **Directory** key to access directory services.



**(Mute)**

Press the **Mute** key to listen to the receiving party without transmitting. Press the **Mute** key again to return to two-way conversation. The **Mute** key applies to handsfree, handset, and headset microphones. The Mute LED indicator flashes when the Mute option is in use.



Press the **Quit** key to end an active application. Pressing the **Quit** key does not affect the status of calls currently on your telephone.

Fwd



**Soft keys** (self-labeled) are located below the LCD display screen. The LCD label above the key changes based on the active feature.

▶ Fwd



**Note:** When a triangle appears before a key label, the feature is active.

More..



Press the **More..** key to access the next layer of **Soft keys** (self-labeled).



When a message is left for the user, the **Message Waiting Indicator** flashes. Also, this indicator flashes when the phone ringer is ON.



Use the **Expand to PC** key to access external server applications such as XSA.



Press the **Copy** Key to copy entries to your Personal Directory from other lists, such as the Caller List, Redial List, Corporate Directory, etc.

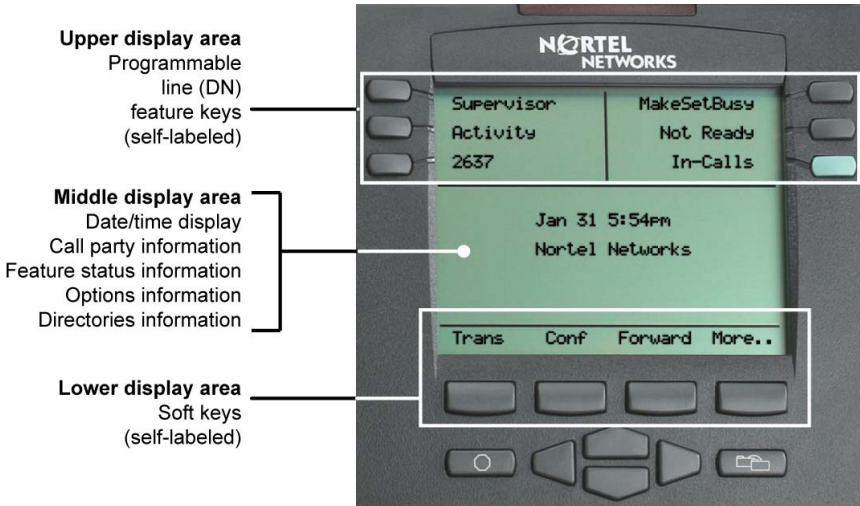
## Telephone display

The IP Phone 2004 has three display areas:

- The upper display area provides line and feature key status.
- The middle display area contains single-line information for items such as caller number, caller name, feature prompt strings, user-entered digits, date and time information, and phone information.
- The lower display area provides feature key label information.

Figure 3 shows an idle LCD screen display.

**Figure 3: IP Phone 2004 LCD display screen**



# Agent and supervisor features

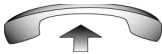
This section describes the following login features that are common to the Call Center Agent and Supervisor:

- “Logging in as agent” on page 15
- “Logging in with Agent ID and Multiple Queue Assignments” on page 16
- “Logging out as agent” on page 20

## Logging in as agent

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Use the Agent Login to enter an Automatic Call Distribution (ACD) queue. If an Agent ID is assigned to you, the display screen prompts you to enter a four-digit code.



1. Lift the handset.

2260



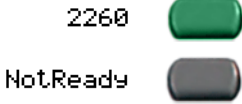
2. Press the **InCalls** key.



3. If “Enter Agent ID” appears on the screen, use the dialpad to enter your ID.



4. Press the # key. The phone goes into a Not Ready state.



- To join the ACD queue, choose one of the following:
  - Press the **InCalls** key.
  - Press the **NotReady** key.



**(Services)**

- If you use a headset and Handset On-Hook Means Log out (HOML) is set to **No** by your administrator, then do the following:
  - Press the **Headset** key and replace the handset in the cradle to receive calls on your headset.
  - Press the **Services** key. Change the “On-hook default path” to “Headset Enabled”.

**Note:** If HOML is set to **Yes**, replace the handset to log out of the queue.

## Logging in with Agent ID and Multiple Queue Assignments

---

A Multiple Queue Assignment (MQA) login involves entering a four-digit Agent ID and up to five ACD Directory Numbers (DN), with the option of adding a Supervisor ID and up to five Priority values.

Choose one of the following login procedures:

- “Logging in with Agent ID and MQA login options” on page 17
- “Using Default Login” on page 19

## Logging in with Agent ID and MQA login options

To enter ACD queues, use an Agent ID login with one of the MQA login options described on page 16.

Use an Agent ID login with one of the following four MQA login options to enter ACD queues.

**Note:** A supervisor logging in to accept ACD calls is prevented by the system from entering a Supervisor ID (including logins where agents must enter a Supervisor ID).

The login options require the following entries in sequential order:

1. a four-digit Agent ID
2. a Supervisor ID (if your queue requires one)
3. up to five ACD DNs and priority values (if priority values are being used) terminated by # #

### To log in:

2260



1. Press the **InCalls** key.

2. Choose one of the following four login options:



— For No Supervisor ID, No Priority, dial your Agent ID # ACD DN 1 # ACD DN 2 # ACD DN 3 # ACD DN 4 # ACD DN 5 # #.



— For Supervisor ID, No Priority, dial your Agent ID # Supervisor ID # ACD DN 1 # ACD DN 2 # ACD DN 3 # ACD DN 4 # ACD DN 5 # #.





— For No Supervisor ID, With Priority, dial your Agent ID # ACD DN 1 # Priority 1 # ACD DN 2 # Priority 2 # ACD DN 3 # Priority 3 # ACD DN 4 # Priority 4 # ACD DN 5 # Priority 5 # #.



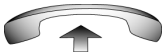
— For Supervisor ID, With Priority, dial your Agent ID # Supervisor ID # ACD DN 1 # Priority 1 # ACD DN 2 # Priority # 2 ACD DN 3 # Priority 3 # ACD DN 4 # Priority 4 # ACD DN 5 # Priority 5 # #.

**Note:** To choose the default Priority value or Supervisor ID, enter #.

- 2260 
- NotReady 
- Choose one of the following:
    - Press the **InCalls** key.
    - Press the **NotReady** key to enter the ACD queue.

## Using Default Login

If you normally use the same telephone, use the **Default Login** to log in just one time at the beginning of a shift. The **Default Login** uses your previous shift's login to place you in the same ACD queues and with the same Supervisor.



- Lift the handset.

2260





- Press the **InCalls** key.



- When “Enter Agent ID” appears on the screen, use the dialpad to enter your ID.



- Choose one of the following:
  - If your queue requires a Supervisor ID, press the **#** key three times.
  - If your queue does not require a Supervisor ID, press the **#** key two times.



- 2260 
- NotReady 
5. To join the ACD queue, choose one of the following:
- Press the **InCalls** key.
  - Press the **NotReady** key.

## Logging out as agent

---

You can log out of the system completely or temporarily (NotReady state).

### To log out:

- MakeSetBsy 
- NotReady 
- Choose one of the following:
- To log out completely, press the **MakeSetBusy** key.
  - To log out temporarily, press the **NotReady** key.

**Note:** If you press the **MakeSetBusy** key while on an ACD call, you log out automatically when the call finishes.

# Agent features

The following sections describe features that are available to Agents:

- “Answering ACD calls” on page 21
- “Using Call Force” on page 22
- “Using Activity Code” on page 23
- “Using Emergency” on page 24
- “Using Not Ready” on page 24
- “Placing or answering non-ACD calls” on page 25
- “Contacting your supervisor” on page 26
- “Supervisor features” on page 29

## Answering ACD calls

---

Use the **InCalls** key to answer the next queued ACD call on the primary DN. The **InCalls** key is located in the lower right-hand of the programmable line/feature keys.

### To answer the call

2260



When the LCD next to the **InCalls** key flashes, press the **InCalls** key.

**Note:** The LCD remains lit as long as you are on the call.

### To terminate the call:



(Goodbye)

2260



2498



NotReady



Choose one of the following:

- Press the **Goodbye** key.
- Press the **InCalls** key.
- Press the individual **DN** line key. (This removes you from the queue).
- Press the **NotReady** key (this removes you from the queue but keeps you logged in as an agent position) or wait for the caller to terminate the call.

## Using Call Force

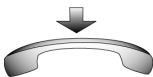
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Use the **Force Call** feature to automatically connect an incoming ACD call. A time interval is set by your system administrator between each incoming call.

When calls come in, a short tone indicates the new call. The InCall indicator lights continuously and the ACD call automatically goes to your agent position. Pressing the **InCalls** key while call forcing (Auto Answer) is active disconnects an active ACD call.

### To enable call forcing for headset users:

1. Log in.
2. Replace the handset.





3. Press the **Services** key. Set the “On-hook default path” to “Headset Enabled”.

## Using Activity Code

---

Use Activity Code to record the types of activities you are performing.

### To record activities:

Activity



1. When the Activity LCD indicator is flashing, press the **Activity** key.



2. Use the dialpad to enter the Activity code.

Activity



3. Press the **Activity** key.

If performing multiple tasks, repeat these steps.

**Note:** If configured, Activity codes can be entered while in the NotReady state.

## Using Emergency

---

Use the **Emergency** feature to contact your supervisor immediately in an emergency situation.

Emergency



1. During an active call, press the **Emergency** key.

**Note:** The Emergency LCD remains lit as long as the feature is active.

When the supervisor answers, a three-way call commences with you, your supervisor, and the caller.

Emergency



2. Press the **Emergency** key again to transfer the caller to the supervisor and terminate your access to the caller and supervisor.

## Using Not Ready

---



Use the **Not Ready** feature to take your telephone out of the call queue while completing post-call work.

NotReady



1. Press the **NotReady** key to temporarily log out of the system.

**Note:** The NotReady LCD remains lit as long as the feature is active.

- 2260 
- NotReady 
- To return to the queue, choose one of the following:
    - Press the **InCalls** key
    - Press the **NotReady** key.

## Placing or answering non-ACD calls

---

Use this feature to receive and place calls on your individual line.

### To place a call:

2498 

- Press your individual DN key.



- Use the dialpad to dial the telephone number.

**Note:** The LCD remains lit as long as you are on the call.

### To answer a call:

2498 

When the LCD next to your individual DN key flashes, press the DN key.

**Note:** The LCD remains lit as long as you are on the call.

## Contacting your supervisor

---

Use the **Supervisor** feature to talk to your supervisor in the following ways:

- “To answer a call from your supervisor:” on page 26
- “To answer a call from your supervisor while on another call:” on page 26
- “To place a call to your supervisor:” on page 27
- “To conference in your supervisor during a call in progress:” on page 27
- “To transfer a call to your supervisor during a call in progress:” on page 27

### To answer a call from your supervisor:

Supervisor



When the LCD next to the **Supervisor** key flashes, press the **Supervisor** key.

**Note:** The LCD remains lit as long as you are on the call.

### To answer a call from your supervisor while on another call:

Supervisor



The LCD next to the Supervisor key flashes and a buzzer sounds.



(Hold)

1. Press the **Hold** key to put the current call on hold.

Supervisor



2. Press the **Supervisor** key.

Press the line (DN) key beside the flashing LED indicator to return to the caller on hold.

### To place a call to your supervisor:

Supervisor



Press the **Supervisor** key.

**Note:** Calls are automatically put on hold when you use the Supervisor key.

### To return to the ACD call:

2260



Press the **InCalls** key.

### To conference in your supervisor during a call in progress:

Supervisor



1. Press the **Supervisor** key to talk privately with your supervisor.

Supervisor



2. Press the **Supervisor** key again for a conference call with your supervisor, yourself, and the other caller.

### To transfer a call to your supervisor during a call in progress:

Supervisor



1. Press the **Supervisor** key.

Supervisor



2. When your supervisor answers, press the **Supervisor** key again.



**(Goodbye)**

3. Press the **Goodbye** key to terminate your access to the call.

# Supervisor features

The following sections describe features available to the Supervisor:

- “Using Answer Agent” on page 29
- “Using the Agent key” on page 30
- “Using Answer Emergency” on page 31
- “Using Call Agent” on page 31
- “Using Interflow” on page 32
- “Using Night Service” on page 32
- “Observing a call” on page 34
- “Displaying the queue” on page 34
- “Displaying agent status” on page 36

## Using Answer Agent

---

Use the **Answer Agent** feature to receive calls from agents in a non-emergency situation.

AnsAgent.



1. When the LCD next to the Answer Agent key flashes, press the **Answer Agent** key.

**Note 1:** The Agent ID of the individual contacting you displays on your telephone.

**Note 2:** The LCD remains lit as long as you are on the call and your status changes to NotReady.



(Goodbye)

2. Press the **Goodbye** key to end the call.

## Using the Agent key

---

Use the **Agent** feature to connect, observe, or monitor the status of each agent position. Each **Agent** key links to a particular agent position and can be used along with the **Call Agent** or **Observe Agent** keys.

Table 1 lists the four states of the LCD indicator.

**Table 1: Agent's status**

LCD display	Description
Off	Agent is not logged in.
On	Agent is logged in but either NotReady or on a call.
Slow Flashing	Agent is waiting for an ACD call.
Fast Flashing	Agent is on a non-ACD call.

## Using Answer Emergency

---

Use the **Answer Emergency** feature to receive calls from agents in an emergency situation.

AnsEmerg



1. When the LCD next to the **Answer Emergency** key flashes, press the **Answer Emergency** key.

**Note 1:** The Agent ID of the individual contacting you displays on your telephone.

**Note 2:** The LCD remains lit as long as you are on the call and your status changes to NotReady.



(Goodbye)

2. Press the **Goodbye** key to end the call.

## Using Call Agent

---

Use the **Call Agent** feature to contact an Agent.

CallAgt



1. Press the **Call Agent** key.

Asgntkey



2. Choose one of the following:
  - Press a selected **Agent** key.
  - Dial the agent's Position ID.



(Goodbye)

3. Press the **Goodbye** key to end the call.

## Using Interflow

---

Use the **Interflow** feature to redirect calls when the backlog or wait time exceeds a pre-defined threshold.

InterFlow



1. Press the **Interflow** key.

**Note:** The Interflow LCD flashes while the feature is active.

InterFlow



2. Press the **Interflow** key again to deactivate the feature and resume normal call flow.

## Using Night Service

---

Use the **Night Service** feature to define how calls are handled outside of business hours.

**To activate Night Service:**

NightSvc



1. Press the **Night Service** key.



2. Press the **6** key (6 = N for Night) to go into Night Service.

The Night Service LCD lights continuously. All calls in queue and new calls receive night service.

### To transition to Night Service:

NightSvc



1. Press the **Night Service** key.



2. Press the **8** key (8 = T for Transition) to activate Transition mode.

The Night Service LCD flashes. All calls in queue remain in queue and new calls receive Night Service.

### To deactivate Night Service:

NightSvc



1. Press the **Night Service** key.



2. Press the **3** key (3 = D for Day) to resume Day mode.

The Night Service LCD flashes. New calls enter the queue.

## Observing a call

---

Use the **Observe** feature to monitor an agent in a call.

Observe



1. Press the **Observe** key.

Agent key



2. Choose one of the following:

- Press a selected **Agent** key.
- Dial the agent's Position ID.

CallAgt.



3. Press the **Call Agent** key to talk to the agent you are monitoring.

Observe



4. Press the **Observe** key to terminate the observation.

## Displaying the queue

---

Use the **Display Queue** feature to access the status of calls in an ACD queue. The information displayed includes the following:

- number of calls waiting in the queue
- number of agent positions occupied for the queue
- the length of time that the oldest call has waited in the queue
- the number of calls that have been overflowed into the queue

To display information on your ACD queue:

DisplayAcd

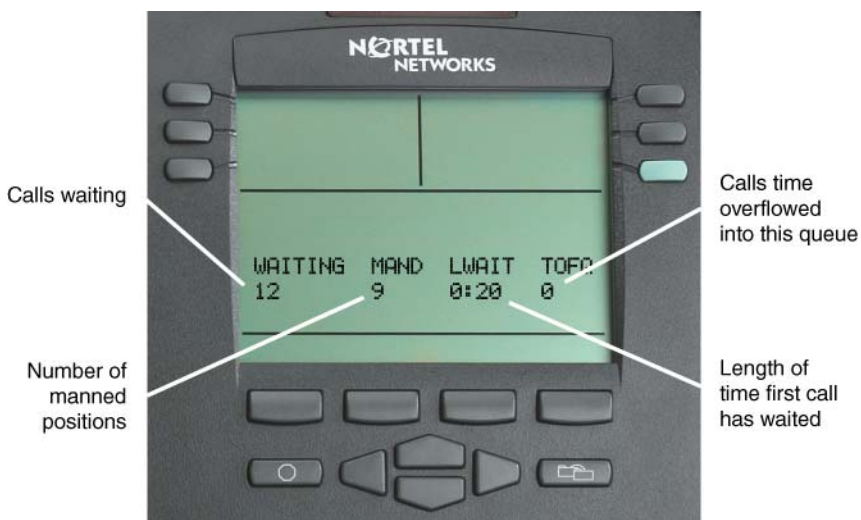


Press the **Display Queue** key.

Information on your current ACD queue appears on the display.

Figure 4 shows the ACD queue status.

**Figure 4: Current status of ACD queue**



## Displaying agent status

Use the **Display Agent** feature to view a summary of current status for all agents who have an agent Position ID key assigned on the Supervisor's telephone.

DisplayAgt



Press the **Display Agent** key. The summary information displays for twelve seconds or until another feature key is pressed.

Agent positions in the Not Ready state are counted as busy on either ACD calls or non-ACD calls, as specified by your system administrator.

**Figure 5: Current status of agents**



The LCD indicator beside the **Display Queue** key gives you a visual indication of the number of calls in the ACD queue. Table 2 lists the four states for this LCD indicator.

**Table 2: States of LCD indicator**

Indicator	Queue status	Description
Off	Light	There are few or no calls waiting.
On	Normal	An acceptable number of calls are waiting.
Slow Flashing	Busy	Calls are backing up in the queue. Calls overflowing to this queue will not be accepted.
Fast Flashing	Overloaded	Too many calls in this queue. New calls are being overflowed to another queue.

# Accessories

## IP Phone Key Expansion Module (KEM)

The Nortel IP Phone Key Expansion Module (KEM) is an optional hardware module that provides additional line appearances and feature keys on your IP Phone 2004. You can connect up to two KEMs to your IP Phone 2004, providing a total of 48 additional keys.

**Figure 6: The IP Phone KEM**



For more information about the IP Phone Key Expansion Module, consult the *Nortel IP Phone Key Expansion Module (KEM) User Guide*.

# Terms you should know

## **Attendant**

A telephone operator in your organization.

## **AutoDial**

A telephone number programmed on the **AutoDial** key for one-touch dialing.

## **Nortel Communication Server 1000**

An office communication system.

## **Copy key**

A fixed key used to copy entries to your Personal Directory from other lists, such as the Caller List, Redial List, Corporate Directory, etc.

## **Date/Time display**

The current date and time when the telephone is in an idle state.

## **Directory key**

Enables access to Corporate Directory, Personal Directory, Redial List, and Callers List.

## **Directory Number (DN)**

A number consisting of one to seven digits for a telephone. Also known as an *extension number*.

## **Expand to PC**

A fixed key on your telephone used to access external server applications such as XSA.

### **Fastbusy**

A signal given when all outgoing lines are busy.

### **Feature display**

An area that shows status information about the feature in use. It also displays the name and status of the active session.

### **Fixed key**

The hard-labeled keys on your telephone.

### **Goodbye key**

A fixed key used to end an active call.

### **Handsfree**

A method of conversing with the party on the other end of the line without lifting your handset.

### **Headset key**

A fixed key used to answer a call using the headset.

### **Hold key**

A fixed key used to place an active call on hold.

### **Information display**

Any display of call activity, lists, prompts, and status of calls. On the Nortel IP Phone 2004, the information area is a 1-line by 24-character display. If the text message exceeds this area, a scroll arrow icon indicates that you must use the scroll keys to view the remaining text.

### **Information line**

A 1-line by 24-character area that displays date and time or application information.

### **Interrupted dial tone**

A broken or pulsed dial tone, heard when you access some features on your telephone.

### **Nortel IP Phone Key Expansion Module (KEM)**

An optional hardware module which provides additional line appearances and feature keys to your IP Phone. Up to two KEMs can be attached to your Nortel IP Phone 2004, providing a total of 48 keys.

### **Message (Inbox)**

A fixed key on your telephone which connects to your voice messaging system when the key is pressed.

### **Message waiting indicator/Incoming call indicator**

An LCD or an LED that indicates the status of a feature by the flash, wink, steady on, or off.

### **Meridian 1**

An office communication system.

### **More..**

An option allowing access to the multiple layers of the soft keys. Soft keys are the four keys located directly below the display area.

### **Mute key**

A fixed key used to listen to the caller without transmitting.

### **Navigation key**

Up/Down and Left/Right keys used to scroll through menus and lists appearing on the LCD display screen.

### **Off-hook**

Any line selected to make a call or receive an incoming call. The term *off-hook* is applied whether (a) the end-user lifts up the handset, (b) the end-user presses a line key, (c) the call is automatically answered at the set, or (d) a line is automatically selected for an outgoing call.

### **Outbox/Shift key**

A fixed key used to switch between 2 feature key pages to provide access to an additional 6 lines/features and an additional 24 lines on the Nortel IP Phone KEM.

### **Primary Directory Number**

The main extension number on your telephone.

### **Programmable line (DN)/feature keys (self-labeled)**

The six keys located at the sides of the upper area of the display.

### **Quit key**

A fixed key on your telephone that is used to exit applications.

### **Ringback/ring tone**

A sound indicating that a call you have made is ringing at its destination.

### **Services key**

A fixed key used to access options such as Telephone Options, Password Admin, Display Network Diagnostics Utilities, Virtual Office Login, Virtual Office Logout, Test Local Mode, and Resume Normal Mode.

**Soft keys (self-labeled)**

A set of keys programmed by your system administrator. These four keys located directly below the display area have four programmable layers. The layers are accessed through the **More..** key. These keys are also used to configure parameters in the **Telephone Option** menu.

**Speaker key**

A fixed key used to activate Handsfree.

**Special dial tone**

The three consecutive tones followed by dial tone that you hear when accessing telephone features.

**Status messages**

A message displayed to inform the user of important information. A right arrow appears if more than one Status Message is present. Examples of Status Messages include: Message Waiting, All Lines Forwarded to: 6453, Do Not Disturb On, Ring Again active, Ringer is OFF, and Line x Unavailable.

**System or Switch**

Your office communication system.

**Switchhook**

A button that the handset presses down, disconnecting your call when you replace the handset. The handset (when lifted) releases the switchhook and you either answer an incoming call or you receive a dial tone to make a call.

**User interface**

Screen displays that interact with the end-user as a result of an action or event.

### **Volume control bar**

A rocker bar you press to increase or decrease the volume of the ringer, handset, headset, speaker and the Handsfree feature.

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Nortel Communication Server 1000

# IP Phone 2004

## Call Center User Guide

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