Navigate Pro User Guide

Splicecom
NavigatePro

1.1.4.8 June 2024

Introduction

This manual contains the information you need to know to operate Navigate Pro in conjunction with a Splicecom system running SelectVoice software[1]. This manual assumes that the Navigate Pro software has been installed on your PC by your system Administrator or system supplier.

Navigate Pro

Available as both a phone partner and softphone, Navigate Pro delivers advanced personal call management features for Splicecom's broad range of IP desk phones, or existing 3rd party analogue telephones via your Windows laptop or PC. Providing point and click access to both commonly used and advanced SelectVoice features, Navigate Pro provides a single intuitive interface to manage business communications for all employees across a business, irrespective of their role.

Navigate Pro delivers all the benefits associated with Splicecom's top of the range IP phones. Calls can be made directly from your Windows^{TM} laptop, or alternatively from your phone's keypad as normal. The same choice is available for call handling (answer, hold, transfer, park, pick-up, conference, etc.) as well.

Navigate Pro integrates Microsoft's Skype for Business and Outlook, fully integrating SelectVoice with these popular desktop apps.

The Navigate Pro software can be configured to run as an IP soft phone or as a partner to your PCS or Yealink telephone.
If Navigate Pro has been configured to partner your telephone it means that your telephone conversations will be via the handset however Navigate Pro will assist you to handle calls quickly and efficiently. If you are using your telephone with a headset your conversations will be via your headset and you can use Navigate Pro solely to handle the calls.
If Navigate Pro is running as an IP soft phone this means your PC becomes your telephone and you will require a headset and microphone connected to facilitate a telephone conversation, if you have a HID compatible headset (Jabra, Plantronics or Yealink) then you will also be able to answer calls via the headset.
When the application is running, a Navigate Pro icon will be displayed in the Notification Area of your Taskbar. This will display applicable information when you make and receive calls as described in the relevant section in this manual.

Trademarks

Navigate Pro is not affiliated, sponsored, authorised, or otherwise associated with or by the Microsoft group of companies.

All other trademarks belong to their respective owners.

Notes:

[1] Navigate Pro will partner to SpliceCom PCS phones and will also run as a softphone if not using SelectVoice software, However Navigate Pro will not be able to use all the available SelectVoice features.

Supporting Documents and Licence Information

The following documents should be referred to in-order to get the best experience from Navigate Pro.

1) SelectVoice AdminPortal User Guide.
2) Splicecom PCS user guide for your model of phone in partner mode operation.
3) Splicecom Yealink Quick Reference guide for your model of phone.
4) This manual.

Licences (Non-Vision call centre working)

The following licences are required to unlock the extra functionality of Navigate Pro.

Navigate Outlook Licence

This licence allows for the integration of Outlook contacts and calendar lookup, please refer to page 52 for further information.

Navigate Softphone Licence

This licence is required for Navigate Pro to be configured as a Softphone.

SelectVoice Version

In order for all the features of Navigate Pro 1.1.4.7 to work, the call server must be running SelectVoice 1.5.169 or greater.

Licences (Vision call centre working)

The following licences are required for a user to enable Vision call centre integration features.

Vision agent licence

This licence is required for Vision call centre agent working, Navigate Pro detects this and enables its own call centre working features in line with Vision call centre.

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Navigate Pro Overview

This section explains the Navigate Pro user interface and explains the meaning of the operational icons together with a guided tour of the main Navigate Pro windows.

Operational Icons

Navigate Pro has many features, these features are accessed by either clicking on an icon or by an icon being displayed when a feature is enabled, or a condition is met.
The following tables show the Navigate Pro icons and there meaning.

Main Window

Icon	Meaning
	Click to show either the Extn name or number
CP	Navigate Pro is in Centralised Partner mode
P	Navigate Pro is in PCS Partner mode
S	Navigate Pro is in Softphone mode
SSL	Navigate Pro is in SSL (Secure Socket Layer) Mode
	Allows you to login/out as a different user (Not available in Centralised Partner Mode)
	Voicemail Message (Icon will flash showing that you have a new message)
	Missed call (Icon will flash showing that you have had a missed call)
	Click to show your Favourites (Speed dials)
	Click to access the Navigate Pro Settings
	Use this to dial the last number dialled
P P	Park slots, use these to park calls instead of transferring a call
	Shows that Outlook is configured to be integrated with Navigate Pro
	Shows that Skype is integrated and ready to be used with Navigate Pro
	Out of office In meeting set
	Out of office At Lunch set
	Out of office On Holiday set
	Out of office Off Site set
	Personal forward set
	Dual Personal forward set
	Dual All Personal forward set
	Forward All calls set
	Forward calls to my Mobile Enabled/Disable
	Forward calls to my Home number Enabled/Disabled
	Forward calls to my spare 1 number Enabled/Disabled
	Forward calls to my spare 2 number Enabled/Disabled
	Network connection issue/issue resolved

Call Panel

Cancel/Hang-up a call

Pause/Place a call on hold

Click to Transfer a call

Use to Mute a call (Softphone mode only)

Mask or unmask a recording, used for hiding the caller's personal information e.g., Credit card details

Switch between calls.

Setup a 3-way conference.

Display the Keypad so that DTMF digits can entered.

Account code entry.

Search Contacts.

Display favourites.

If enabled, this feature[1] will allow a user to be logged onto 3 devices (1 x Softphone 1 x Desk phone and 1 x iPCS) simultaneously and can move a call between those devices by clicking the Call Select globe icon.
On a call click to reveal the call panel.

HD Voice call/Normal voice call

Call Panel for Voicemail

Cancel/Hang-up the call

Forward Message to a Colleague

Play or listen to the message again

Delete message

Save message

Rewind by 2 seconds

Fast Forward by 2 seconds

Skip back to previous message

Skip forward to next message

Call History Window

Signifies an unanswered (or missed) incoming call

Signifies an answered outgoing call

Signifies an unanswered outgoing call

Signifies an answered incoming call

Unread Message

Old or Read Message

[1] Requires SelectVoice SV1.4 or above.

Favourites Window

Favourite is Idle

Favourite is ringing

Favourite is on a call

Group Icon

Leave a group to get back to the main favourite screen

Contact Search

Contact from SelectVoice database

Contact from Outlook

Work Contact

Mobile Contact

Home Contact

Call centre working (Requires Vision agent licence)

Vision agent available

Vision agent not available

Vision agent codes and features

Vision agent logout from call centre

Vision agent request help/Help requested

Agent functions menu

Miscellaneous

Icon	Description
🔇	Call volume muted
🔊	Call volume MIN
🔊	Call Volume next level
🔊	Call Volume next level
🔊	Call Volume MAX
1	Keypad Button 1
2 ABC	Keypad Button 2 and letters AB and C
3 DEF	Keypad Button 3 and letters DE and F
4 GHI	Keypad Button 4 and letters GH and I
5 JKL	Keypad Button 5 and letters JK and L
6 MNO	Keypad Button 6 and letters MN and O
7 PQRS	Keypad Button 7 and letters PQR and S
8 TUV	Keypad Button 8 and letters TU and V
9 WXYZ	Keypad Button 9 and letters WXY and Z
0	Keypad Button 0
*	Keypad Button *
#	Keypad Button #
⚠️	There has been an error, please contact your reseller
📞	Voicemail Greeting ICON
📖	User Manual
📘	Quick Reference Guide
🔄	Downgrade to a previous version of Navigate Pro
N	Software up-date available
🎤	A Microphone has not been connected to the PC
🔊	No Speakers have been detected on the PC
⚙️	Customise Mic and Speaker settings
🎧	Standard headset settings

Navigate Pro Guided Tour

Navigate Pro has several windows that are displayed at various times when making and receiving calls, the main operational windows are described below.

Navigate PRO Main window.
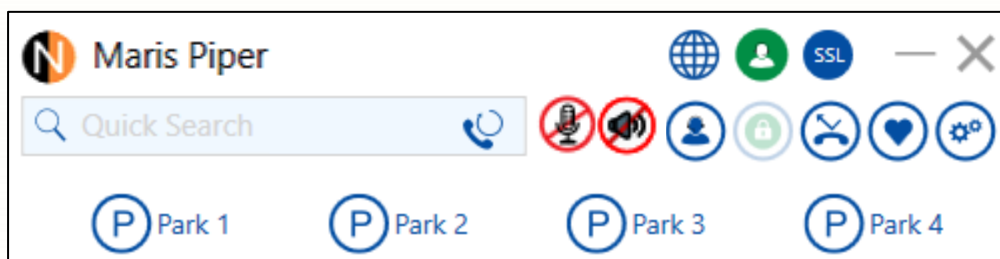
The main window can show various icons (As described in the Operational Icons section above) as well as the icons the Main Window also has the following.

User Name/Extn

Next to NavigatePro Icon, your username is displayed, clicking on the ⓝ icon changes the display and toggles between displaying your username and extension number.

Maris Piper	User Name
2001	Extn Number

Quick Search Field.

This field allows you enter a number to call, either a extension or a DDI (External Number) to call. The last number dialled is stored and can be quickly called again clicking on the redial last number icon

Minimise and Exit

The main window can be minimised and closed by using the following icons.

—	Minimise window
✕	Exit NavigatePro

User Mode.

Navigate Pro can work in two modes, Softphone and Partner mode, when running in Softphone mode Navigate Pro acts like a desk phone but on your computer, allowing you to have all the functionality of real phone on your desk. In Partner mode Navigate Pro will partner to your PCS desk phone or Yealink SIP Phone[2] and allow you to control it from your desktop.

Softphone SSL
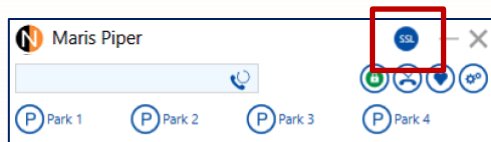
Centralised Partner

Softphone
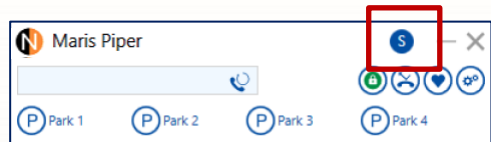
PCS Partner
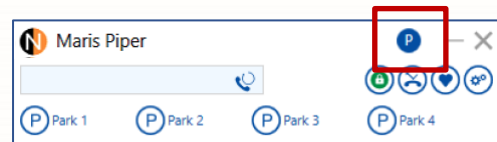
Softphone SSL.

This mode is typically used when you are away from the office or a remote worker, it allows connection to the office telephone system using a secure connection.

Softphone.

This is used when you are local to the telephone system, IE in the same building/office.

PCS Partner.

This mode is used when connecting to a Splicecom PCS phone.

Centralised Partner.

Used for partnering to a Yealink Phone.

Settings.

Clicking on settings allows you to change your preferences, set your forwarding, DND state, Out of Office status and make changes to your user configuration, see page 21 for a fuller explanation of the options.

DND	
User Mode	▶
Groups	▶
Divert Calls	▶
Divert To	▶
Out Of Office	▶
Extension Anywhere	▶
User Configuration	
Help	▶
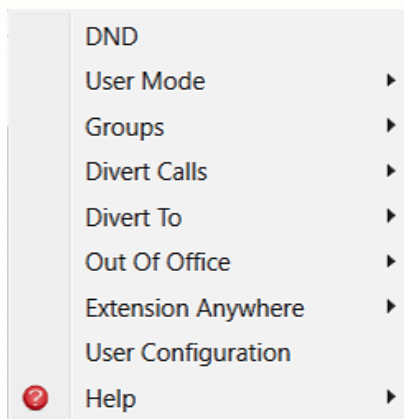
Favourites Window.

The Favourites window shows your speed dial and speed dial groups, together with the current call state of the extensions and departments being shown.

Favourites			— ✕
📁 Dragon Group	📁 Falcon Group	📁 Star Ship Gro...	📞 Analogue
📞 Arnold	📞 Bulk test Dep...	📞 Dept	📞 ext 2259
📞 Gillian	📞 Main	📞 Non Vision De...	📞 Park Pickup U...
📞 pcs5x3-1	📞 pcs5x3-2	📞 T56A	📞 Vision Dept
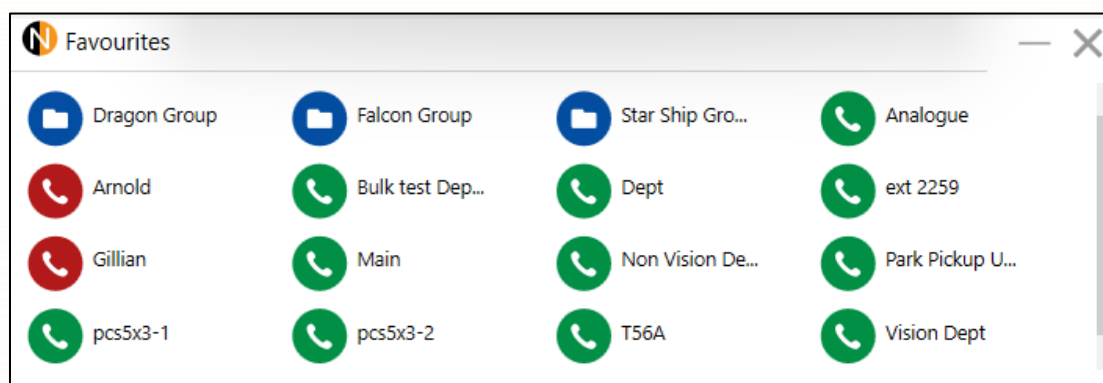
Favourite Icons.

📞 Favourite is Idle
📞 Favourite is ringing
📞 Favourite is on a call
📁 Group Icon
← Leave a group to get back to the main favourite screen

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Call History and Messages.

Call history shows you your missed, incoming, and outgoing calls together with any voice messages that have been left for you.

Right clicking on an entry will bring up a selection bar that gives you actions that you can perform on an history entry.

Copy the number to your clipboard
Add the number to the contacts directory
Add the number to your favourites
Delete the call history entry

Call back the person who left the voicemail
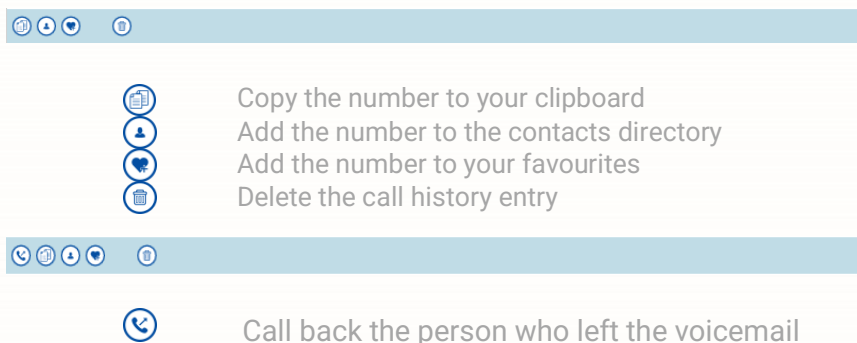
	Time	Name	Source	Number	Mailbox
	16:39 28/6/2019	SIP2004		2004	Extn2013
	16:18 28/6/2019	SIP2004		2004	Extn2013
	15:59 28/6/2019	SIP2004		2004	Extn2013
	15:59 28/6/2019	SIP2004		2004	Extn2013
	15:58 28/6/2019	SIP2004		2004	Extn2013
	15:57 28/6/2019	SIP2004		2004	Extn2013
	15:46 28/6/2019	SIP2004		2004	Extn2013
	15:38 28/6/2019	SIP2004		2004	Extn2013
	14:45 28/6/2019	Extn2012		2012	Extn2013
	14:44 28/6/2019	Extn2012		2012	Extn2013
	14:40 28/6/2019	Extn2012		2012	Extn2013

Call History Window Icons

Signifies an unanswered (or missed) incoming call

Signifies an answered outgoing call

Signifies an unanswered outgoing call

Signifies an answered incoming call

Unread Message

Old or Read Message

Each column within the call history window can be re-sized as well as re-ordered.

Clicking on the mail icon ⊠ removes all the call history except for mail messages.
Right clicking on the Voicemail entry brings up an extra icon.

Park Slots.

The SelectVoice system has several configurable park slots and displays 4 as standard. Park slots give an alternative method of dealing with a call instead of using a transfer. Details of the caller are shown against the relevant Park Slot and they are held until they are picked up.
(Please refer to the Installation and Maintenance Guide for instructions on how to do this)

(P) Park 1   (P) Park 2   (P) Park 3   (P) Park 4
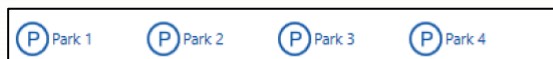
Redial and Quick Search.

To make a call enter the Ext/ISDN number to be called in the Quick Search area of the main Navigate Pro window, as you type the contacts window will appear showing you all found items so far. If you are searching for a user the search window will also show the status of that user in the first column, for example if they are already on a call.

To dial the last number used you can click the Redial Icon 📞
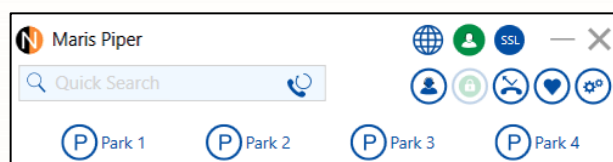
Each entry displayed shows all the possible numbers assigned to that contact in the Telephone column.

- 🏢 Work Number
- 📱 Mobile Number
- 🏠 Home Number
- (SPARE 1) Spare 1 Number
- (SPARE 2) Spare 2 Number

Navigate Pro Call Panel

When making or receiving a call Navigate Pro will display the call panel at the configured position, the call panel is a dynamic window which changes depending on the progress of the call.

Outgoing Call Panel

Splicecom Ltd (02037502999)
Bruce Maddox (7002)
Detail   75 %   Duration   Number
Splicecom Ltd   00:00:06   02037502999
ANSWER   CANCEL
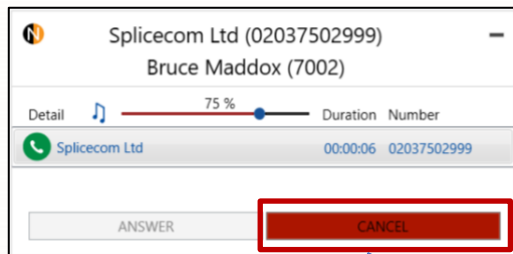
Click to cancel call or hang-up if in partner mode

Answered Outgoing Call Panel

Splicecom Ltd (02037502999)
Bruce Maddox (7002)
Detail   50 %   Duration   Number
Splicecom Ltd 02037502999   00:00:11   02037502999
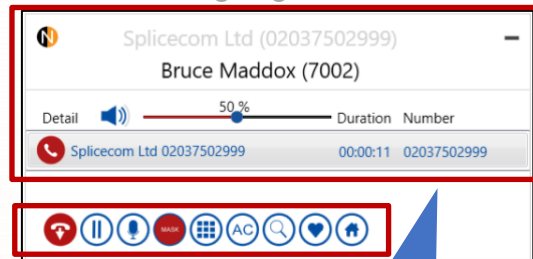
In call options

Call Information

Incoming Call Panel

Jasper Conrad (7001)
Bruce Maddox (7002)
Detail   75 %   Duration   Number
Jasper Conrad 7001   00:00:08   7001
ANSWER   REJECT
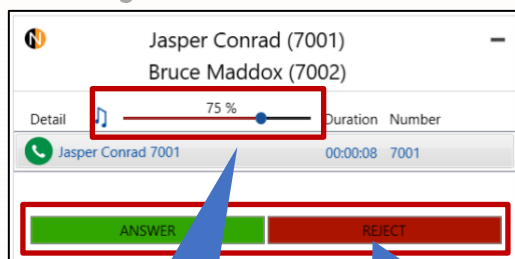
Ringing volume
(If in softphone mode)

Click Answer to accept the all or Reject to close the call or send the call to voicemail
(If enabled)

Answered Incoming Call Panel

Splicecom Ltd (02037502999)
Bruce Maddox (7002)
Detail   50 %   Duration   Number
Splicecom Ltd 02037502999   00:00:11   02037502999
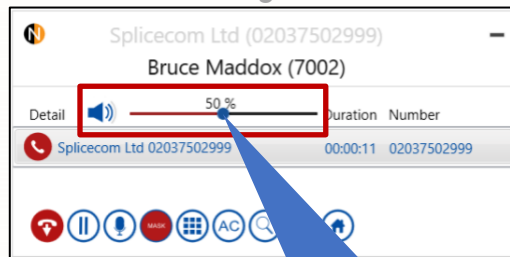
Call Volume
(If in softphone mode)
NOTE: Clicking on the speaker icon will bring up the settings page so a different sound device can be selected

Transfer and Conference call Panel

Jasper Conrad (7001)
Bruce Maddox (7002)
Detail   50 %   Duration   Number
Splicecom Ltd 02037502999   00:02:08   02037502999
Jasper Conrad 7001   00:01:21   7001

In call options

User Configuration

| General | Numbers | DND Exception | Forwarding | Favourite | Ring Tunes | Advanced |

Partner
Soft Phone
Voicemail
Search Filters
Outlook
Skype
Call Panel
Favourite Panel
Hot Key Dialling
System Info

Soft Phone Configuration

Server Address   cnhpbx1.splicecom.co   Port   5000
Alt Server Address   0.0.0.0   Time   00 : 00
Hotdesk Number   2254   SSL Enable ☑
Hotdesk Code   ••••••••   SRTP Enable
STUN Server Addres   Port   3478
Clear Certificate   Accept Default Certificate ☑
Headset
Speech   Realtek Audio
Additional Ring   Disable
BLF   Soft Phone Licence ☑
Serial Number   8c-ec-4b-0d-88-df (172.16.10.145, Ethernet

Restart   Close

Navigate Pro Task Bar Working

The Navigate Pro System Tray/Task bar icon will change reflecting the current action, (On call, conferencing etc). If you right click on the Navigate Pro icon you will see a quick menu, from here you can quickly display Navigate Pro's various windows.

Quickly add a new contact

Click to search contacts

Click to show the call history window

Click to display Navigate Pro Call Panel (Used if Auto hide has been enabled)

Click to show the Favourites window

If your Navigate Pro Windows are not appearing as expected, use reset windows location to bring them back.

Click to check to see if there is another version of Navigate Prop

Click to display the main Navigate Pro window

Click to close the menu

Right Click System Tray Icon

- Add New Contacts
- Search Contact
- Call History
- Call Panel
- Favourites
- Reset Windows Locations
- Check for Update
- Navigate Control
- Exit
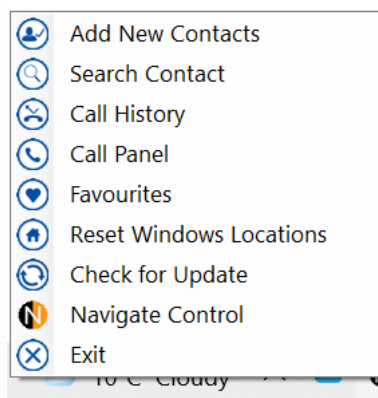
Right Click Task Bar Icon

Tasks
- Add New Contact
- Search Contacts
- Call History
- Call Panel
- Favourites
- Reset Window Locations
- Check Updates
- Exit

- Navigate Pro
- Pin to taskbar
- Close window

Teams   Navigate Pro

Hover Over Task Bar Icon

Kay Burley

Quick Search

Park 1   Park 2   Park 3   Park 4

Navigate Pro

Set DND

Search contacts

Display missed calls

Display favourites

Jump to audio settings for a softphone

Jump to settings

Task bar showing loss of connection error.
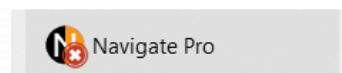
Navigate Pro

Navigate Pro auto software update.

You can set Navigate Pro to automatically check for software updates by going to the Advanced tab in the configuration menu and selecting System Info from the left-hand menu options and ticking Updates. Once ticked Navigate Pro will periodically check Splicecom's update servers to see if a new version is available[1]
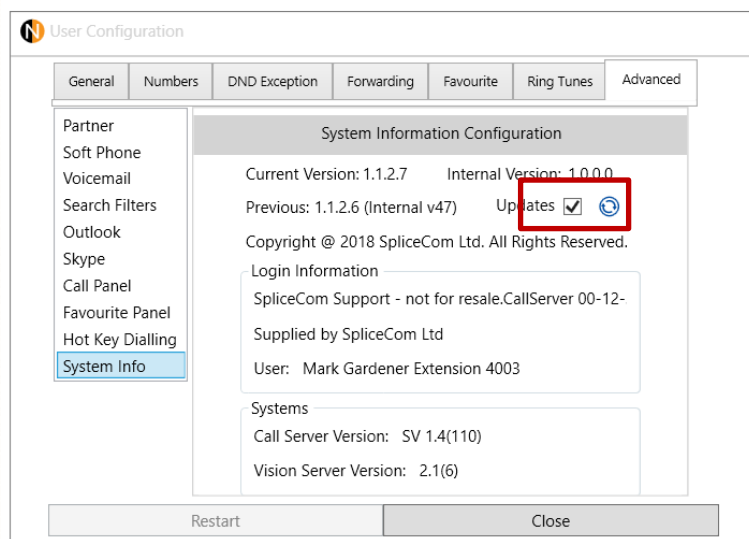
If a new version of Navigate Pro is available, then the task bar icon will show a red dot to denote an update is available, you will also see a message window.
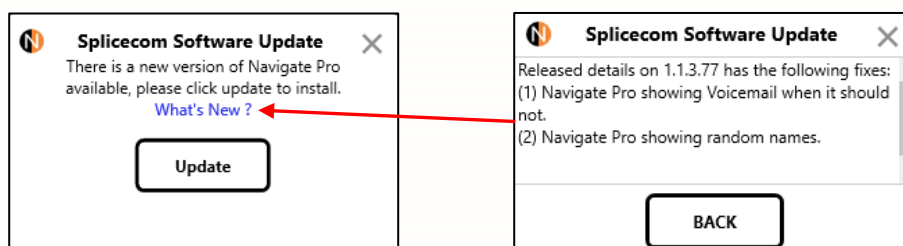
Clicking the 'What's New' button gives a brief explanation of the changes in the new version, if you close the pop-up window you can install the update later by right clicking on the Navigate Pro icon in the task bar and selecting Update Available.

You can also check to see if you have the latest version by selecting 'Check for update' from the same menu, if you have the most recent version, you will see the following message
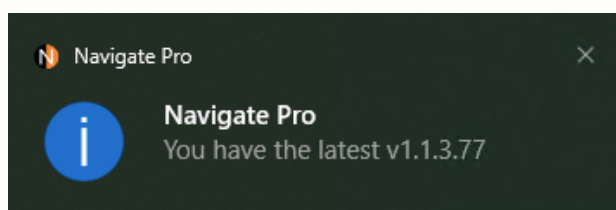
[1] In order for Navigate Pro to auto update, your windows user must have Administrator privileges.

Notes:

If NavigatePro has been installed on a Server, the following items are restricted to logged in users having administration privileges:

- Pop up notification showing a new software update is available.
- The "Check for Updates" on the taskbar Navigate Pro menu.
- If you defer the installation of a new software update, NP will remind you of the new software update is available by showing the Navigate Pro taskbar icon with a red dot. The reminder will be shown on every Navigate Pro restart until you install the updates.
- Software auto update is disabled for server platforms and for restricted domain users.
- When installed on server, normal users cannot restore the previous installed version.

If NavigatePro has been installed on a standalone PC/Laptop:

- Software auto update will be disabled if the Call Server version is lower than the software minimum product version. The minimum version window pops up once and every time NP starts.
- By default: the software auto update is enabled for a stand-alone PC.
- Software auto update is disabled for server platforms and for restricted domain users.
- When installed on server, normal users cannot restore the previous installed version.

Navigate Pro auto software update.

If for some reason you need to install the previous version of Navigate Pro, you can do this by clicking the restore icon in found in the user configuration Advanced tab under system info.
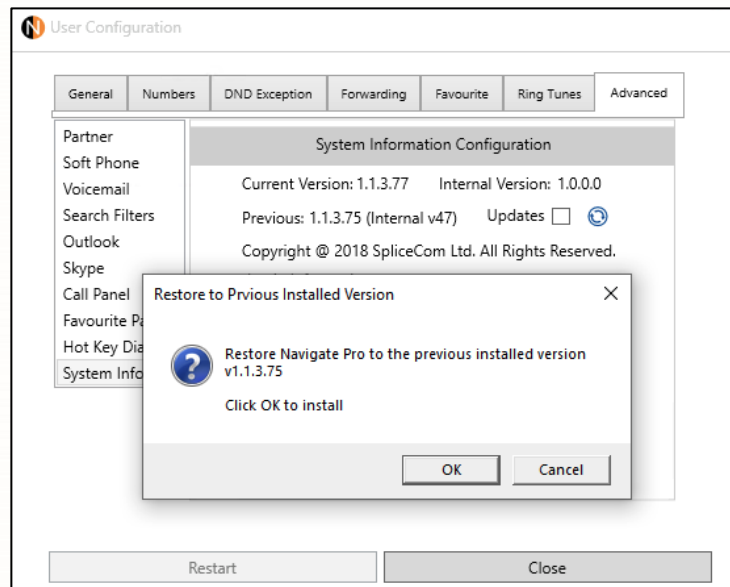
NOTE: Some NavigatePro features will require that the SelectVoice system is also requires upgrading for the feature to work correctly.

If the SelectVoice system is running a version of software that is below the minimum required version, then you will see a popup window and you will NOT be able to continue upgrading.
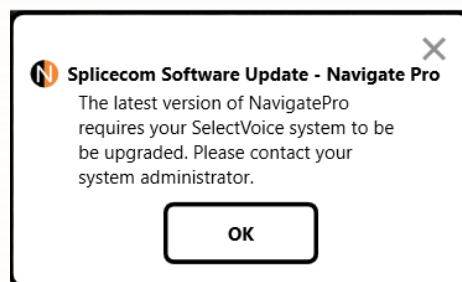
Settings and User Configuration

The settings option allows you configure common user settings as well as some more advanced options used for Skype for business and Outlook integration (These should have been previously configured by your installer or system administrator). The following section describes each option and how to use it.

DND (Do Not Disturb)

The Do Not Disturb facility allows you to set your extension as permanently busy. This is useful if, for example, you are holding a meeting in your office and do not wish to receive any calls.

To set DND against your user, click on the settings icon and click on the DND option.

DND Disabled

DND Enabled

When DND has been set Navigate Pro will show the DND icon in the status bar.
Your calls will be automatically passed to your Forward on Busy number, if configured, or to voicemail, if enabled, or the caller will receive busy tone. Calls will be logged in your Missed Calls list.

If Navigate Pro is being used in Partner mode, then when you lift your handset you will hear broken dial-tone to remind you that DND has been enabled.

User Mode

Navigate Pro software can be configured to run as an IP soft phone or as a partner to your telephone.

If your Navigate has been configured to partner your desk telephone this means that your telephone conversations will be via the handset but Navigate Pro will assist you to handle calls quickly and efficiently. If you are using your telephone with a headset your conversations will be via your headset and you can use Navigate solely to handle the calls.
If your Navigate Pro is running as an IP soft phone this means your PC becomes your telephone and you will require a headset and microphone connected to facilitate a telephone conversation.

Double Click to remove DND
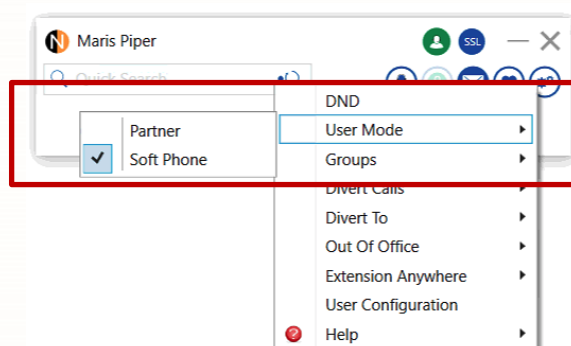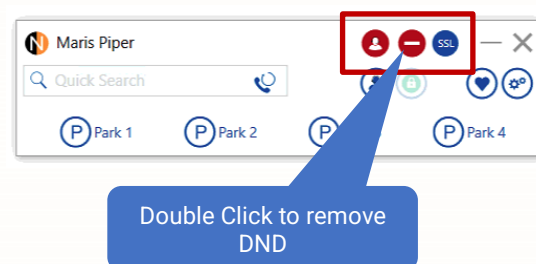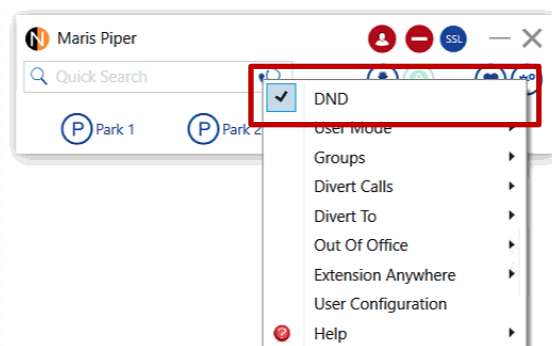
Divert Calls

This facility allows you to configure your extension so that your calls follow you to an internal extension or to an external number so that when you are, for example, working at another desk, working at home, or using your mobile etc, your calls will still reach you. You could also use this feature when you are, for example, on holiday and wish all your calls to be diverted to your assistant or another colleague.

To set a Divert click the settings icon and select Divert Calls, you will see a sub menu with several selections.

- **Personal** – all calls to your extension and direct line number will be diverted.

- **Dual Personal**[1] – all calls to your extension and direct line number will be forwarded, however, your extension will also ring. This will ensure that you can pick up the call wherever you are.

- **All** – all calls to your extension, direct line number and any Department calls will be diverted.

- **Dual All**[1] – All calls to your extension, direct line number and any Department calls will be forwarded, however your extension will also ring. This will ensure that you can pick up the call, wherever you are.
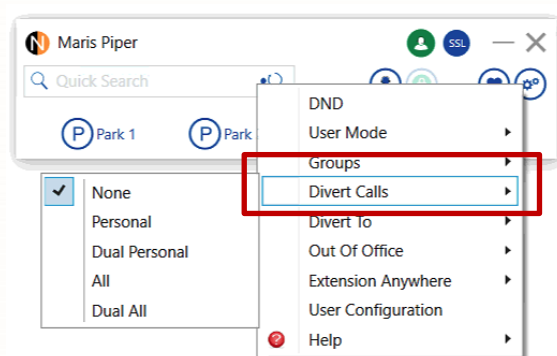
Divert To

Select which number to divert your calls to from your Personal Numbers (Mobile, Home, Spare1 Spare2 or Assistant) These can be set separately.

- Divert calls to your mobile.
- Divert calls to your home number.
- Divert calls to one of two spare number's.

The divert to menu is dynamic and will only show the selection where a number has actually been set against it.
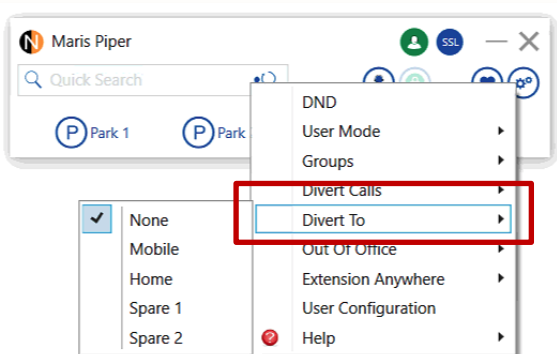
[1]The Dual Personal and Dual All options are useful if you are in role where you are constantly moving away from your desk. You could set your Divert to your mobile, for example, so that you can answer calls wherever you are, and when you are back at your desk you do not need to turn off Divert Pro answer the calls at your desk.

Out of Office

When you are unable to answer your phone, you may wish to inform your colleagues of your whereabouts and when you will be available. An Out of Office Message can be configured, and this will be displayed on your colleagues' Navigate or PCS Device.

There are five Out of Office states to choose from:

- **In the Office**
- **In Meeting**
- **At Lunch**
- **On Holiday**
- **Off Site**

To set an out of office message click on the appropriate state, you will see a tick appear next the selected option

Extension Anywhere

If you are a user of a PCS IP phone or analogue handset and Navigate Pro is partnering this telephone you can use the Extension Anywhere feature when you are, for example, working from home. This feature will allow you to receive and make calls from, for example, a home telephone or mobile as though you were in the office. This means callers/recipients will be unaware that you are working from home, you will not incur any call charges and you will be able to handle the call as if you were in the office, e.g. transfer calls. To turn on Extension Anywhere click on the Settings icon and select Extension Anywhere from the menu from here select the number you wish to use, e.g. Mobile or Home. The options listed here will be dependent on the numbers stored within your user account. To turn off Extension Anywhere select None from the menu selection.
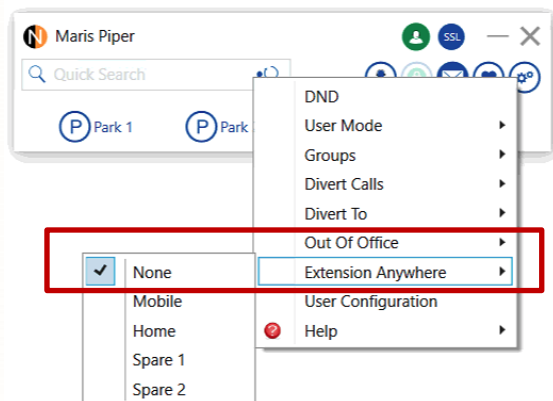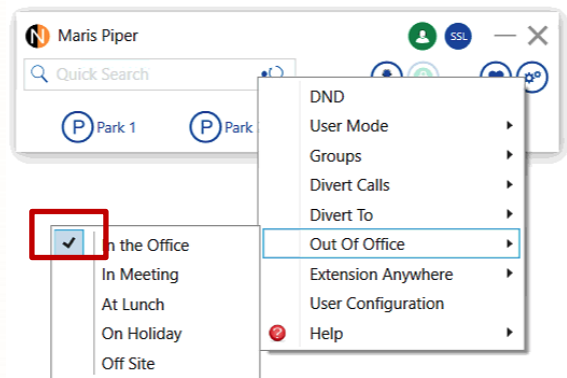
User Configuration

For more advanced user configuration, click on the settings icon and select User Configuration, you will be taken to a separate window with the extra settings, by default you will be taken to the Advanced tab first.
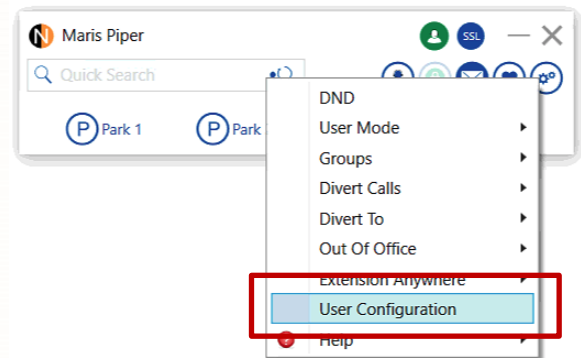
Help

Clicking on Help will allow you to download the on-line manuals.

NOTE: The first time you click on the user manual menu item Navigate Pro will download the manual from the internet, subsequent times will be quicker as the manual has already been downloaded.
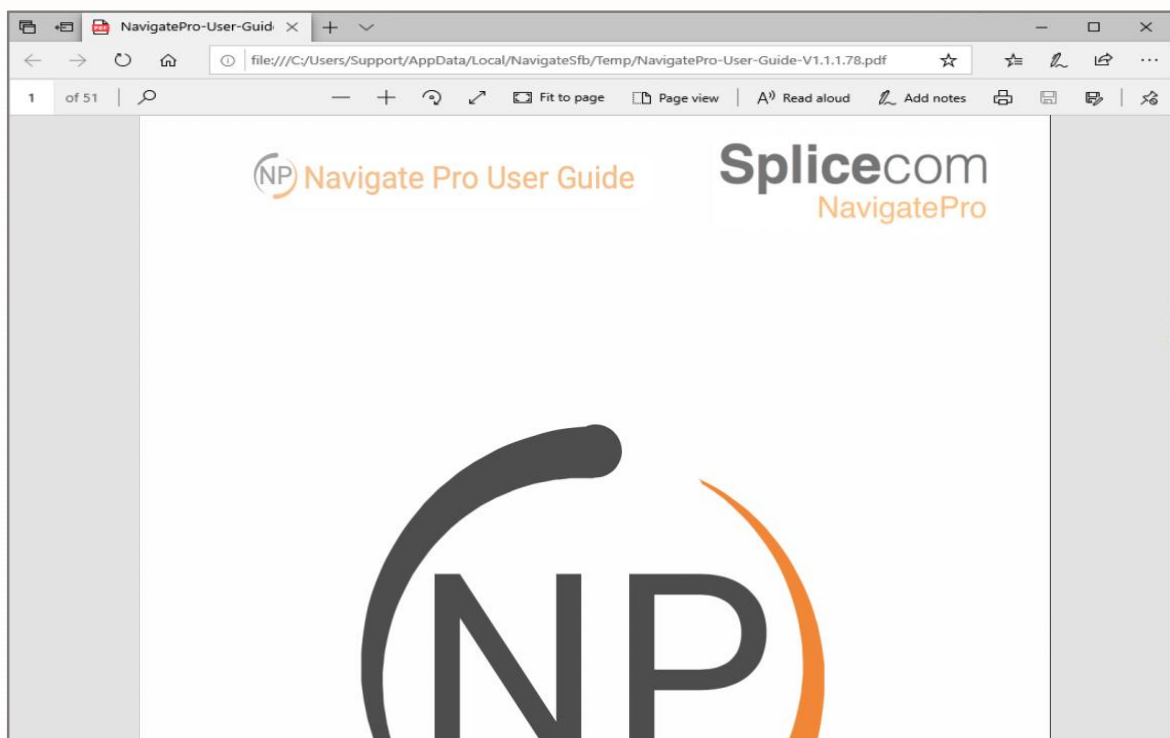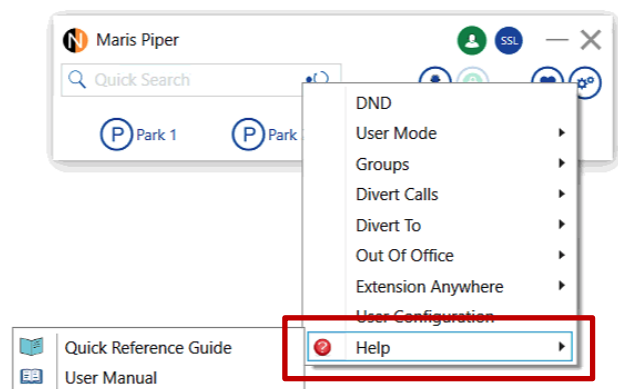
User Configuration Advanced Tab

The Advanced tab has a Sub selections that can be selected, the next section will go through each of the section in turn.

Partner	Sets up PCS and Centralised Partner configuration.
Soft Phone	Sets up Softphone operation for Local and SSL.
Voicemail	Allows you record your Voicemail greetings.
Search Filters	Set what categories you can search.
Outlook	Setup Outlook Integration.
Skype	Enable Skype Integration.
Call Panel	Personalise the Call Panel.
Favourite Panel	Set the Favourite Panel Preferences.
Hot Key Dialling	Configure Hot Key Dialling.
Development	Reserved for Reseller and Splicecom use.
System Info	Shows Navigate Pro version information.
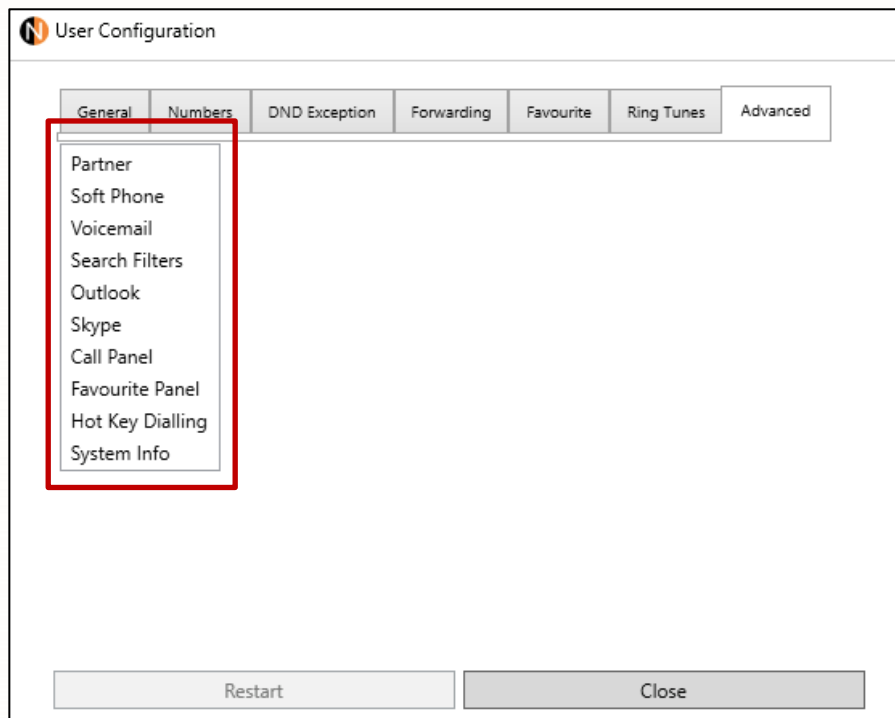
User Configuration Advanced (Partner)

If Navigate Pro is going to be configured to be a partner to your handset there are several settings that need to be configured for this to work, in most cases these options will have been configured for you and must not be changed, however here is a brief description of each field for your information. Please refer to your system administrator for further details if required.

IP Address

The IP address of the module or PCS IP Phone that the Navigate application will connect to[1] If you are using Centralised Partner, then this becomes the IP address (Internal or External) of the call server the Yealink phone is homed to.

Port

The number corresponding to the port on the module entered in the IP Address field that Navigate will be partnering. This will always be 5001 if partnering a PCS IP phone.

CP (Centralised Partner)

Ticking CP enables centralised partner mode, this allows Navigate Pro to control a Yealink phone, just like Partner mode for PCS devices. When you tick CP it automatically changes the port to 4018.

Login Code

The digits entered in the handset's Partner Login Code field on the system configuration, this is used when you are partnering a PCS Phone device.
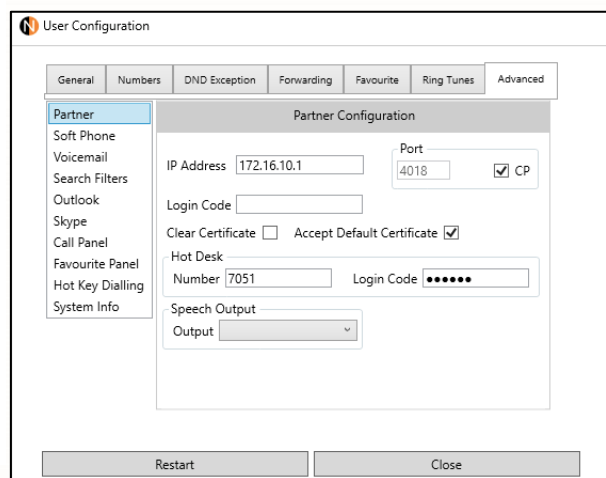
Hot Desk

These fields, in conjunction with the Port and Partner Login Code fields, can be used to assist you if you are a hot desking User. These fields can be configured to allow you to log on to more than one choice of handset and your Navigate will automatically partner any of these handsets. This is useful if, for example, you are a laptop user and when you come into the office you log on to any available phone at any available desk. Navigate can be configured once to partner any of these handsets.
If you are using Centralised Partner, then you must enter in the Hot-desk Number field your user's extension number and your login code in the login Code field.

Speech output

This will be taken from the setting on your PC, otherwise use the drop-down list to select the Speakers or any HID devices you would like to use for playing ringing etc.

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[1] Splicecom's products are in a continuous development cycle and therefore subject to changes in working, one such change will be direct partner mode configuration to PCS devices, this will be removed in a future release of NavigatePro in favour of centralised partner.

Advanced (Soft Phone)

If Navigate Pro is going to be configured as a Soft Phone there are several settings that need to be configured for this to work in most cases these options will be configured for you and must not be changed, however here is a brief description of each field for your information. Please refer to your system administrator for further details if required.

Gatekeeper

The IP address or Domain name of the Call Server or SSL Gateway that the Navigate Pro application will connect to.

Alt Gatekeeper

The IP address or Domain name of the Call Server or SSL Gateway that the Navigate Pro application will connect to if the Main Gatekeeper fails.

Port

Port number used by the SSL Gateway. SSL Enable: to enable the SSL connection for this application.

Time

Time in Hours and Minutes that NP will fall back to the original gatekeeper if the Alt Gatekeeper has been invoked.

Hot Desk Number and Hot Desk Code

These fields, in conjunction with the Port and Partner Login Code fields, can be used to you if you are a hot desking User. These fields can be configured to allow you to log on to more than one choice of handset and your Navigate Pro will automatically partner any of these handsets. Please refer to your system administrator for further information.

STUN Server and Port

If you intend to user SRTP you will need to enter a STUN server (Domain name or IP address) together with a STUN Port number, normally 3478 or 5060 if using a Splicecom Container.

SSL Enable

Check to enable the SSL (Secure Socket Layer) connection for this user.

SRTP Enable

Check to enable SRTP (Secure Real-time Transport Protocol) audio for this user.

Clear Certificate/Accept Default Certificate

These items should not be changed unless advised by your reseller.

NOTE:

If the Navigate Pro user is configured as a Vision agent and the Alt Gatekeeper is used, then all Vision Agent functionality is removed from Navigate Pro by greying out and disabling the all the agent options.
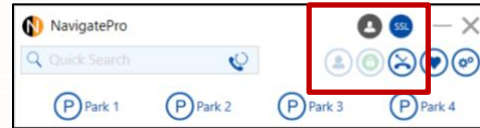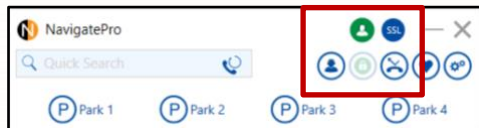
Audio Speech and HID

There are two audio selections available in Navigate Pro 1.1.3.77.

🎧 Clicking on the headset icon allows you to change the speech device, it is assumed that the selected device is a headset and has both input (Mic) and output built in.

⚙ Clicking the cog allows you to choose both input and output devices.

To select the audio device, you want to use for receiving and making calls use the Speech drop down list.
You will see two types of device, shown in either red or black, a device shown in red is a device that does not support the HID (Human Interface Device) options for Answering, Releasing, Muting and changing the volume, Devices shown in black are valid HID devices.
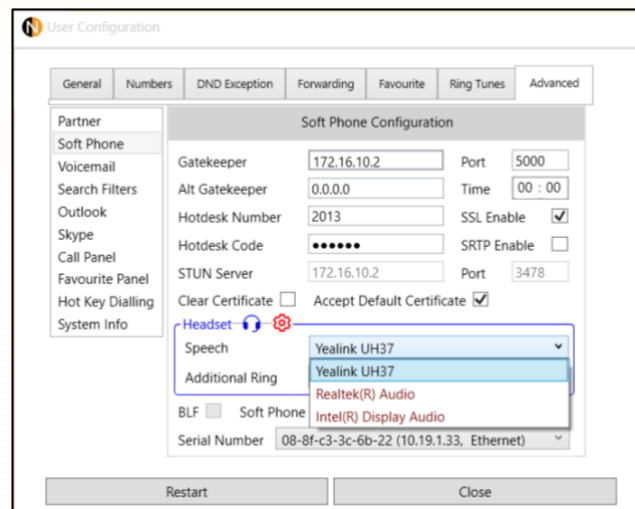
Additional Ring

If you want to hear a call ringing when you have your headset removed, then use the Additional Ring drop down list to select a device to hear the ringing (Note the call will ring on both the selected Speech device as well as the Additional Ring device)
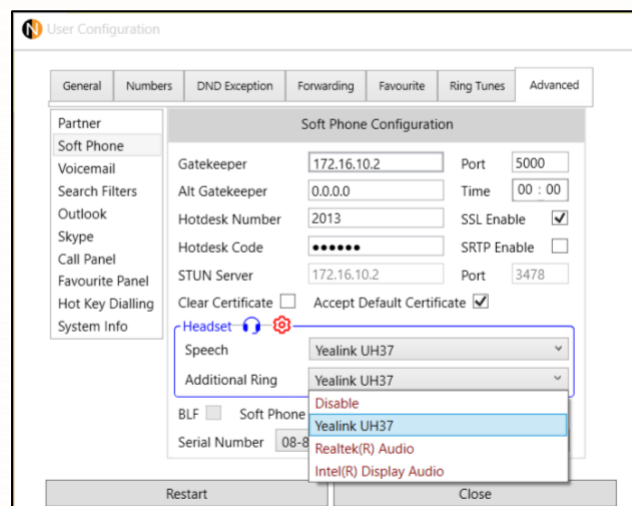
Using the Advanced audio option.

If you want to use separate devices for input and output, then clicking on the red cog allows, you to manually select your Mic and Speaker devices.

Selecting a microphone device.

Click on the drop-down list and select the microphone you wish to use.
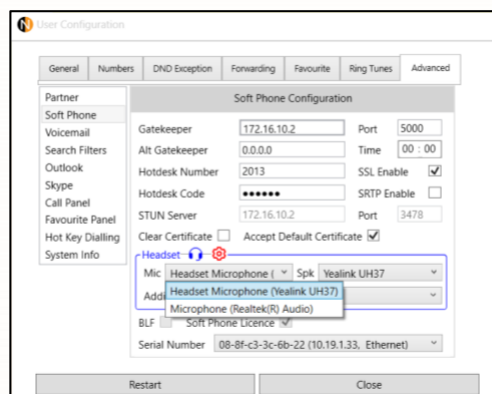
Selecting a speaker device.

Click on the drop-down list and select the speaker you wish to use.
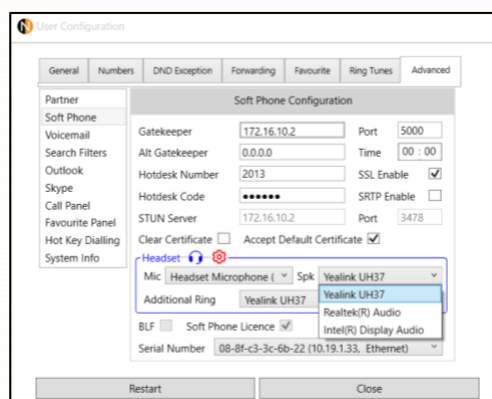
Selecting an addition ring device.

Click on the drop-down list and select the speaker you wish to use.
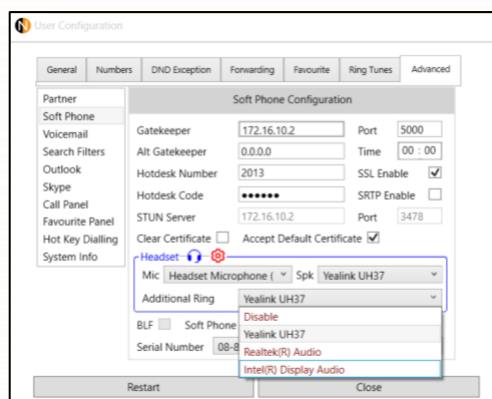
Supported Headsets

Currently NavigatePro supports:

- Yealink
- Plantronics
- Jabra

Serial Number

Typically, the serial number is a mac address on your laptop, however this is just a reference, once Navigate Pro has been entered onto the SelectVoice system, the initially selected reference will be used from then on, regardless of interface is being used on the PC.

Windows Sound settings

It is important that the Windows sound settings are setup correctly as Navigate Pro will always attempt to use the default sound devices for Playback and Recording.
It is therefore recommended that the PC's Speakers and Microphone are set as default, these settings can be found under Advanced Sound Options.
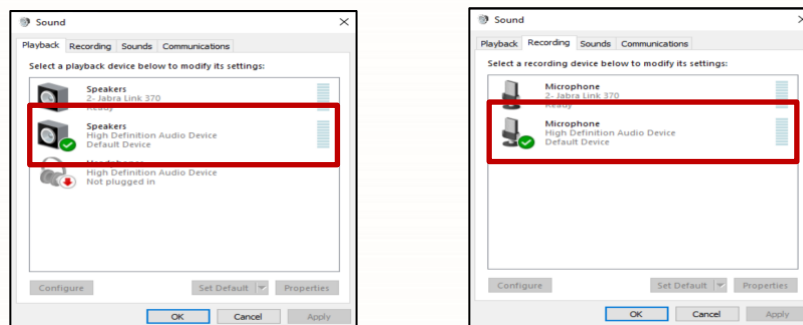
Advanced (Voicemail)

If you have voicemail enabled, you can record two voicemail greetings. The first is a daily greeting that you would normally update daily, typically giving the date and your whereabouts/availability. The second is a permanent greeting that can be used on any day. If you choose to record a permanent greeting your daily greeting will be deleted at midnight and the permanent greeting will then be used until you record a new daily greeting.

Changing your daily Greeting

Click on the Record Daily Greeting Icon

Your existing Daily Greeting will be played back to you, if you want to re-record your greeting you will be prompted to record your new greeting, after you have recorded your greeting click the Hang up icon.

Changing your permanent Greeting

Click on the Record Permanent Greeting Icon

Your existing Permanent Greeting will be played back to you, if you want to re-record your greeting you will be prompted to record your new greeting, after you have recorded your greeting click the Hang up icon.
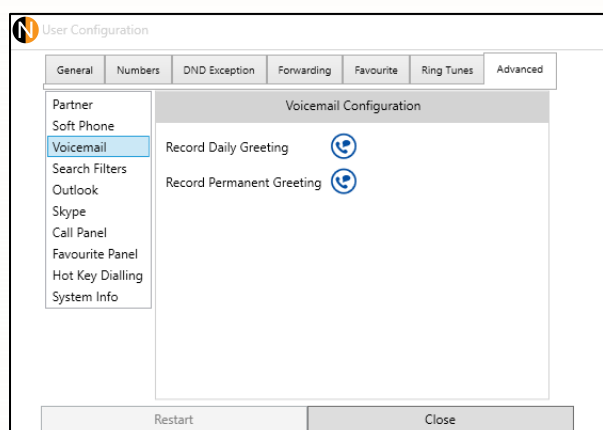
Advanced (Search Filters)

The Directory provides access to a database of contact information that is stored centrally on your SelectVoice system. Your system administrator is responsible for the maintenance of this database and will be able to assist you with your queries.
The type of records displayed are determined by the selected filters select or de-select the options as required.

Users Filter

If checked this will display a list of the User accounts on your SelectVoice system allowing you to quickly and easily call a colleague. The search will be made within the User's Display Name field. If the User's First Name and Last Name fields have been populated the search will also be made within the Last Name field enabling, you to search on someone's surname

Departments Filter

This will give access to the list of Departments configured on your SelectVoice system that will allow your call to be routed efficiently to a group of Users.

Contacts Filter

This will display the list of external contacts entered on your SelectVoice system allowing you to quickly and easily make calls to customers, suppliers, etc. The search will be made within the Contact's Name field. If the Contact's First and Last Name fields have been populated the search will also be made within the Last Name field enabling, you to search on someone's surname.
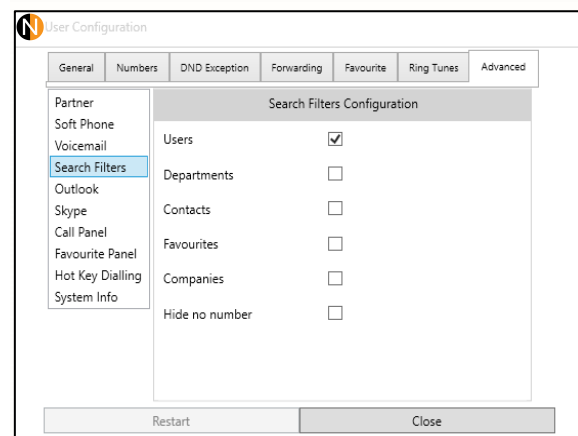
Favourites Filter

Will give access to the Speed Dials stored within your user account.

Companies Filter

This will display the list of external contacts entered on your telephone system allowing you to quickly and easily make calls to customers, suppliers, etc. The search will be made within the Contact's Company field, if populated.

Hide no number

If Hide no number is ticked, any contacts without a telephone number assigned to them will not be shown in any of the contact searches.

Advanced (Outlook)

If you use Microsoft Outlook for your calendar and storing your contacts, your user account can be configured to enable you to turn on Outlook Contact Lookup and Outlook Calendar Lookup in Navigate. Outlook Contact Lookup will enable Navigate Pro to search within your Contacts[1] so that you can easily and quickly dial numbers stored in your Outlook Contacts. To enable this feature, you will have to setup your Outlook Profile and select the contact folder to use.

Outlook Enable

If your user has the appropriate licence then Outlook Contact and Calendar will automatically be ticked, the licence tick box will also be checked.

If your user does not have a valid licence, then you will see a warning telling you that Outlook functionality is disabled.
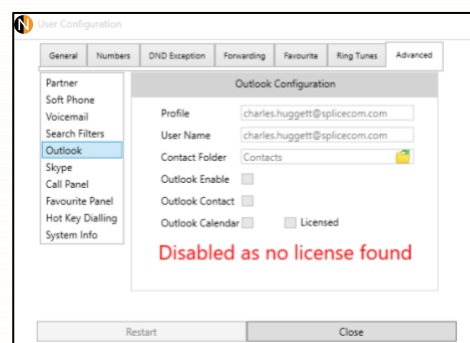
So that you can use Outlook Contacts you first have to enable this feature by clicking the Outlook Enable check box.
Then select your Contact folder by clicking in the Contact Folder field and selecting the folder to use from the directory search window.
Click on the contacts folder, the username will be automatically filled out.
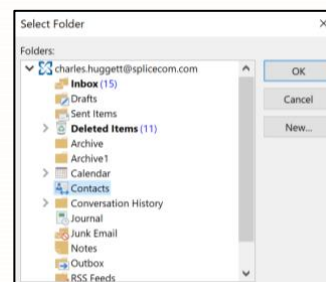
Advanced (Call Panel)

You can change the position and way Navigate Pro's Call Panel acts when on a call, by default the call panel will appear in the bottom right corner and will fade out in 15 seconds. To change this click use the following options:
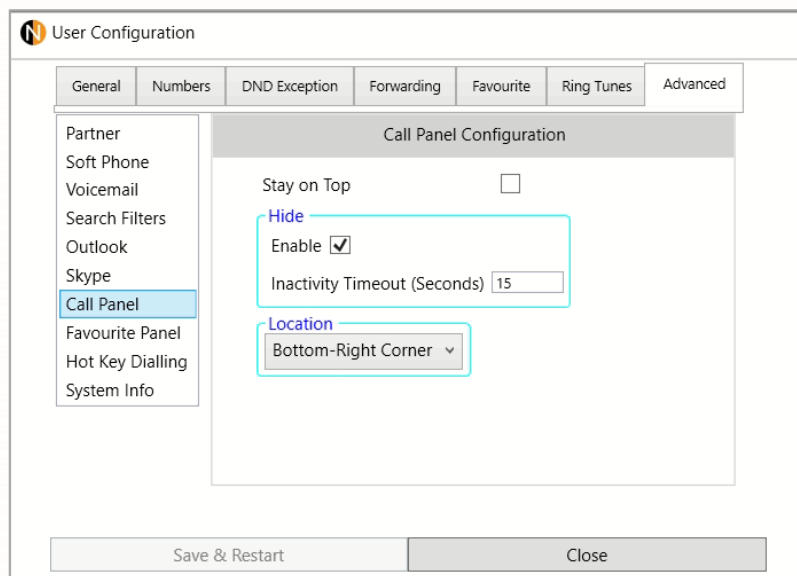
Stay on Top

This option allows the call panel to remain on top of other applications windows.

Hide

Check to allow the call panel to hide itself after the inactivity timeout expires.

Inactivity Timeout

Amount of time in seconds it takes for the Call Panel to fade out.

Location

You can choose which corner of the screen the call panel appears:
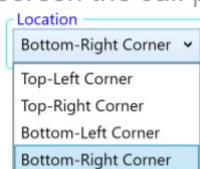
The call panel will default to the bottom right-hand corner of the screen.

Advanced (Favourite Panel)

You can have your favourites window dock with Navigate Pro so that are always visible.

Launch Favourite on Start-up

When checked the favourites window will be launched at the last known position when Navigate Pro is started.

Enable Docking on Navigate Centre

Check to attach your favorites window to the top of Navigate Pro.

Always on Top

Selecting always on top makes the favorites. panel appear on-top of any windows application.
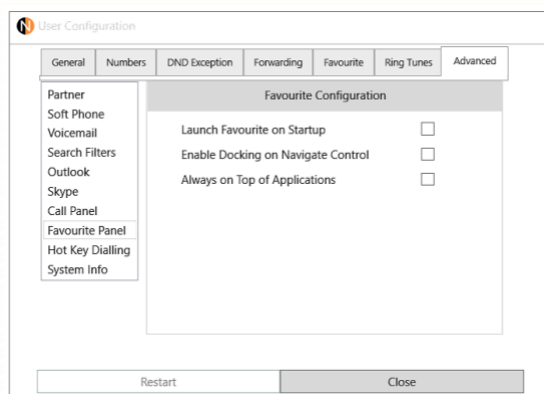
Un Undocked favourites
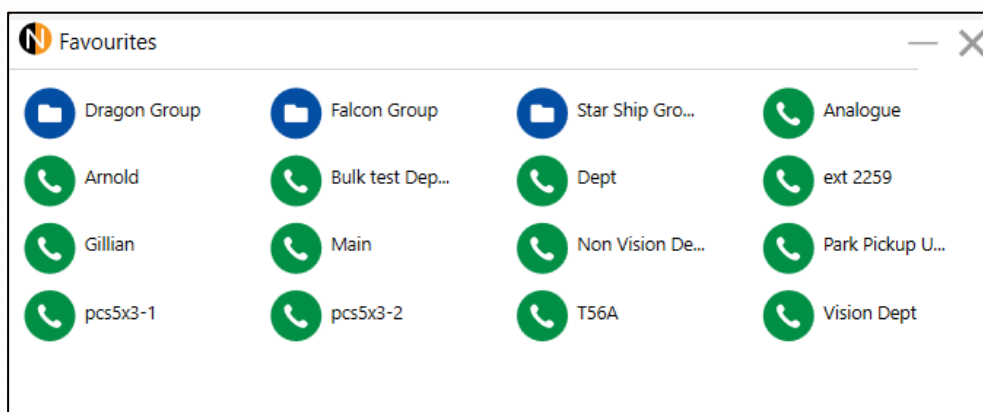
Docked favourites
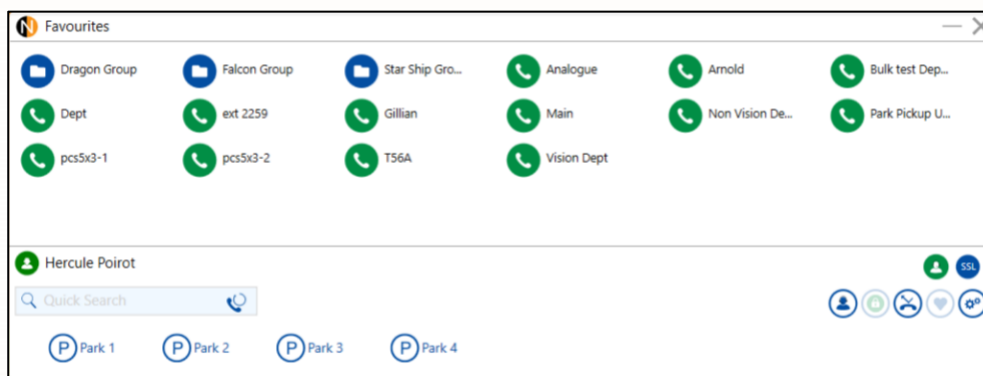
Note:
When the favorites window is attached the window, controls move from the main Navigate Window to the Favorites window.

Advanced (Hot Key Dialling)

You can set a Dial Hot key which will enable you to dial numbers stored within a Microsoft document or within a website viewed via Internet Explorer.

Hot Keys

Select the Key combination you wish to use by selecting the function key from the drop-down menu followed by any other sequence of Ctrl, Shift or Alt.

Once you have selected your key sequence tick Enable.
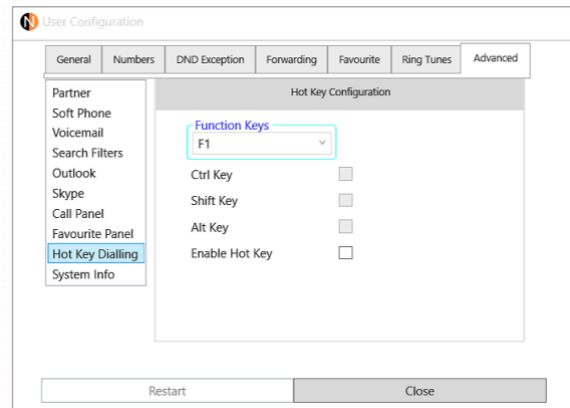
Advanced (System Info)

The System information window shows the current version of Navigate Pro and any previous version information. Navigate Pro 1.1.2.13 and above also gives you the option to auto update Navigate and to also restore to a previous version.

Your current login and licencing information are also shown, as well as the Select Voice and Vision versions as these may be needed by your reseller if you are experiencing any issues.

Settings (General)

The SelectVoice system gives you the ability to configure features such as call waiting, forwarding, do not disturb. Navigate Pro enables you to configure these settings via the General Tab.

Please note that these settings are stored in your user account and therefore will follow you when you log on to another handset or PC running Navigate Pro.

Call Waiting

Call waiting allows you to handle a second call whilst being connected to another call, there are 4 selectable states that can be chosen: -

None	Call waiting is disabled, subsequent calls will get busy or Go to voicemail (If enabled).
Enabled	When you get a second call Navigate Pro will alert you that you have a second call and you will also get an audible alert in your headset or handset.
Phone Tools	Currently not supported.
No Tone	When you get a second call Navigate Pro will alert you that you have a second call but you will not get an audible alert.

Select the type of Call Waiting you require and then click save.

Out of Office

Users may wish to inform internal callers when they are unavailable. The message selected will be displayed on the caller's pcs56x/57x Phones and on Navigate Pro when you pre-dial a number or perform a directory look up.

You can also create your own Out of Office Message, e.g. "On Holiday until Tuesday, 6th Feb", By using the Out of Office Message Field.
(Please refer to the relevant user manual for further details.)
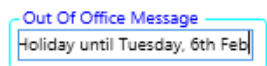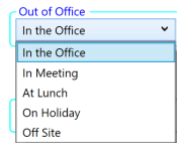
Audio Device Preference

You can tell Navigate Pro to always use your preferred audio device, or immediately use a new device when its plugged in.
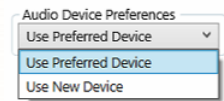
Follow Me

The Follow Me feature will allow you to take calls, for example, on your mobile or at home, when you are out of the office or at another extension if, for example, you are spending the day in another part of the building or in another office.

Follow Me	Icon	Description
None		Calls will not be forwarded.
Personal	👤	All calls to your extension and personal DDI will be forwarded.
Dual Personal	👤x2	All calls to your extension and personal DDI will be forwarded, and your phone will ring.
All	👥	All calls to your extension will be forwarded including any calls to a department that you might be a member of.
Dual All	👥x2	All calls to your extension will be forwarded including any calls to a department that you might be a member off, and your phone will also ring.
Personal External	👤	All external calls to your extension and DDI will be forwarded
Dual Personal External	👤x2	All external calls to your extension and DDI will be forwarded, and your phone will also ring.
All External	👥	All external calls to your extension and DDI will be forwarded including any calls to a department that you might be a member of.
Dual All External	👥x2	All external calls to your extension and DDI will be forwarded including any calls to a department that you might be a member of, and your phone will also ring.
Personal Internal	👤	All internal calls to your extension will be forwarded.
Dual Personal Internal	👤x2	All internal calls to your extension will be forwarded and your phone will also ring. Any calls to a department that you may be a member of, will also ring on your extension.
All Internal	👥	All internal calls to your extension will be forwarded including any calls to departments you may be a member of.
Dual All Internal	👥x2	All internal calls to your extension will be forwarded including any calls to departments you may be a member of, and you phone will also ring.

Follow Me
None
None
Personal
Dual Personal
All
Dual All
Personal External
Dual Personal External
All External
Dual All External
Personal Internal
Dual Personal Internal
All Internal
Dual All Internal

Do Not Disturb
When ticked places your user into DND.

☐ Do Not Disturb

Auto launch
When ticked Navigate Pro will auto start when you start windows™

☐ Auto Launch

Settings (Numbers)

You can add your Home and Mobile telephone numbers entered via the Settings, Numbers tab. You can also use the Spare1 and Spare2 Telephone Number fields to enter two additional numbers if required.
Please note: If the Ex-Directory option is ticked your number's will not appear in a Directory search made by another user.
These numbers will also be matched against incoming CLI and display the User's name in Caller Display. It is therefore very important that extension numbers are not entered into these fields.

Settings (DND Exception)

You may wish to turn on Do Not Disturb but still receive a call from a colleague or an external number.
This is useful if you are expecting an urgent or important call but do not wish to be disturbed by other calls. The relevant number can be set as a Do Not Disturb exception as follows.

To add a number exception, enter the extension number or ISDN number into the Add New Entry Field, then click OK to add the new number.

To remove a number, highlight the number you wish to delete And then click the Del button.

Settings (Forwarding)

The Forward on Busy feature will redirect your calls to either an internal or external number when you are on an existing call or have Do Not Disturb set. This is useful if you wish to ensure your calls are answered by your assistant or another member of your team.

To have your calls forwarded to another extension or ISDN number first select the forwarding type from the drop-down box.

Forward Type	Description
None	Forwarding is disabled, no calls will be forwarded.
Internal and External	All internal and External calls to you will be forwarded
Internal	Only internal calls will be forwarded
External	Only External calls will be forwarded

Forward on Busy

After selecting the type of forward enter the number you wish to forward your calls to into the number field.
Then click save to activate your forward.
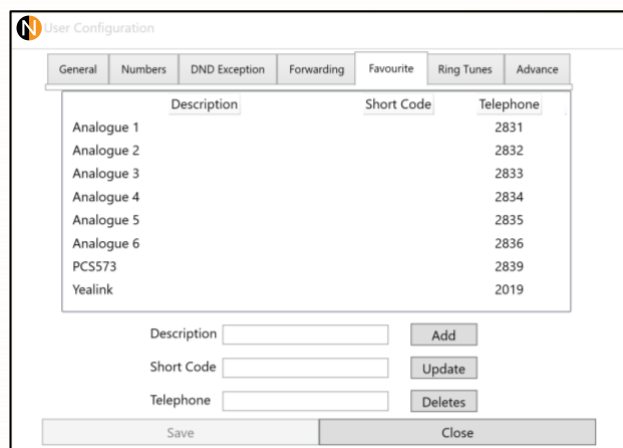
Forward on No Answer

After selecting the type of forward enter the number you wish to forward your calls to into the number field.
Then click save to activate your forward.

Settings (Favourite)

The Favourites section of your User Configuration form allows you to set up your own personal list of regularly used telephone numbers (internal or external). These are displayed and accessed within the Favourites window by click on the Favourites icon ♥. Favourites set up for internal extensions will also act as Busy Lamp Fields (BLF) in other words they will indicate when that user is on the phone.

Adding a new Favourite
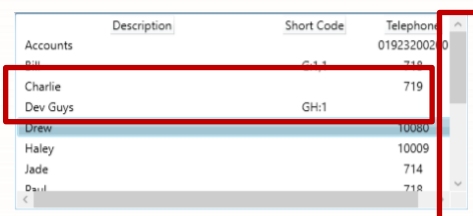
To add a new Favourite first enter the description.
Followed by a short code.
Finally, enter the Internal or External number to be.
dialled

Click Add to save your new entry.

Editing an existing Favourite

To change an existing Favourite entry, find the favourite by using the scroll bar to move up and down the list and then select the Favourite. to edit by clicking on it, this will then Hi-lighting the entry you wish to edit.

The information for the selected Favourite will appear in the edit fields, make the changes to the description, short code or telephone number.

And then click Update to commit your changes.

Deleting a Favourite

To delete an existing favourite entry, find the first find the favourite by using the scroll bar to move up and down the list and then select the Favourite to edit by clicking on it, this will then Hi-lighting the entry you wish to edit.

The information for the selected Favourite will appear in the edit fields,

And then click Delete to remove the entry.

You will be prompted with a delete confirmation Click Yes to delete your favourite or no to cancel

Using Favourites to configure your Park slots

By default, all Users of Navigate, PCS 58x, 57x and within your company will have icons/buttons to access park slots 1-4. However, you can choose to:

- Remove all the Park slots. This would be useful if, for example, you don't use the Park facility and you wish to have more room for your Favourites.
- Create Park slots to access alternative park slots. This would be useful if you need a park slot that is only going to be used by the colleagues in your department, or you would like an icon to a park slot only used by yourself, for example.

To remove all park slots from Navigate Pro create a Favourite with a telephone number of slot0

Navigate Pro with standard park slots.
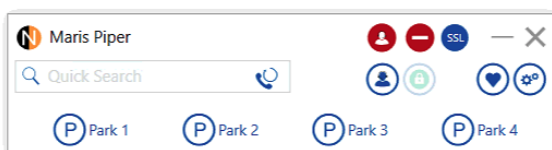
Navigate Pro with park slots removed.
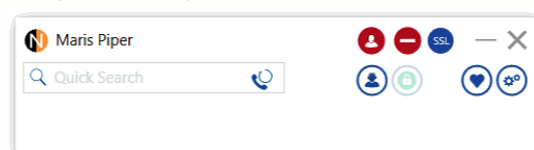
Notes:

1) If a telephone number entered in your Favourites is also stored in the Contacts or Users directory, when a call is made to or received from this number, the text entered in the Description field of the Favourite will be displayed in Call Status in preference to the name used in the corresponding Contact or User directory entry.
2) For numbers that you dial regularly you may prefer to assign a short code to a Favourite so, for example, you could dial just 33 to ring 01632953492. (Please note that the short code you use must not be the same as a short code you are already using for other system functionality, please refer to your System Administrator for further assistance.)

To create alternate Park slots, for example Park slot 20, create a new Favourite with a telephone number of slot20. If you want to give your new Park slot a specific name, then enter a colon: followed by the text of the Park Slot. If you leave the description blank, then for this example the description will default to 'Park 20'

Custom Park Slot configuration

Navigate Pro shows the custom description
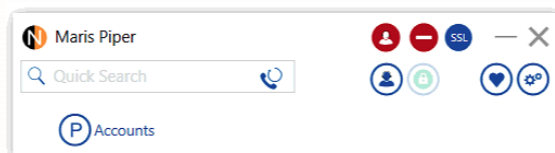
Standard Park Slot configuration

Navigate Pro shows a standard park slot
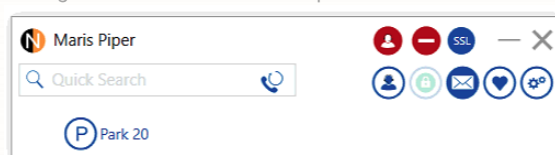
All Favourites and Favourite Groups will be displayed in alphabetical order. However, if you wish to display your Favourites in a different sequence a display order number can be assigned using the following methods.

If you wish to specify where a Favourite will be displayed in your Favourites window, in the Short Code field enter the characters PRI: followed by a number for the priority, e.g. PRI:1.

Description	Short Code	Telephone
Freidaland	PRI:3	2010
Henry	PRI:1	2252
James	PRI:2	2253
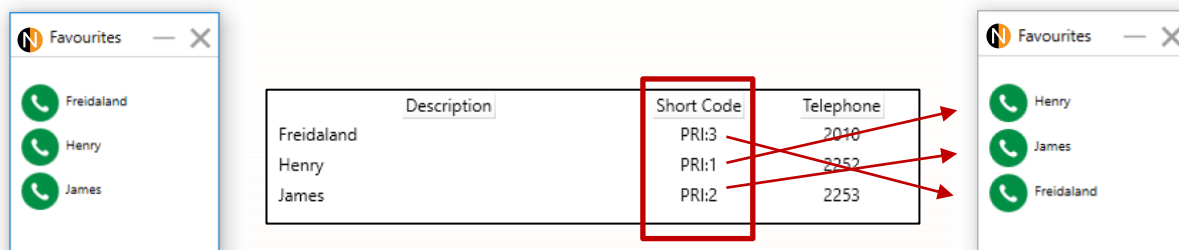
You can also group your Favourites in their own folders, to do this first create a group header by using the following characters in the Short Code field GH:1 where the number represents the group number.

If you wish to specify where a Favourite assigned to a Favourite Group will be displayed within that group, in the Short Code field add a comma and then the order number required, e.g. G:1,1.

Description	Short Code	Telephone
Freidaland	G:1,1	2010
Henry	G:1,2	2252
James	G:1,3	2253
Sales Group	GH:1	1
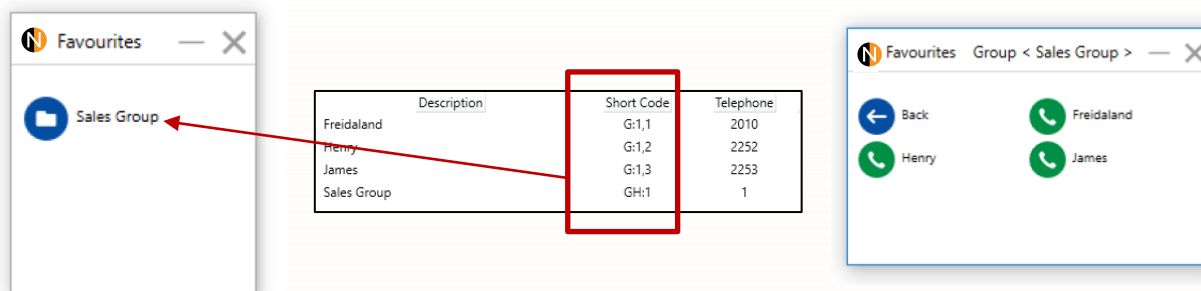
Settings (Ring Tunes)

The Ring Tunes section of the User Configuration form allows you to use ring tunes played by your Navigate Pro application to distinguish between the different types of incoming calls, for example, between a Department call and a call to your User account. Your PC must have a sound card to use the Ring Tunes facility and the selected ring tune will be played over your PC's speakers. If you are using Navigate Pro application to partner a PCS IP phone this configuration will also affect the ring tune used by these handsets. Any other telephone handset will continue to use one of its pre-set ringing cadences.

Ring tune types

There are 6 ways in which you can customise your ring tune, these can be selected from the type drop down list in the Ring Tunes window.

System
Internal
External
Call ID
Destination
Dual Ringing

System	Use System to distinguish calls generated by the telephone system, for example voicemail call-back.
Internal	Play a specific ring-tune when receiving an internal call
External	Play a specific ring-tune when receiving an external call
Call ID	Play a ring-tune when receiving a call from a specific number
Destination	Differentiate a department call from a call to your extension
Dual Ringing	If you have Follow Me Dual Personal or Dual All set against your user, you may wish to have a different ring tune played to remind you that this feature has been set.

Enter the internal (User or Department) or external number into the Telephone number field

Telephone		Update

Select the ring-tune you wish to use from the drop Down list

Tune	Ring Tune4	Delete

User Configuration

General	Numbers	DND Exception	Forwarding	Favourite	Ring Tunes	Advanced

Type	Telephone Number	Tune
Internal	2839	Ring Tune 3
External	01923282200	Ring Tune 4
Caller ID	07515345662	Ring Tune 5
Destination	8000	Ring Tune 3

Type	External	Add
Telephone	01923282200	Update
Tune	Ring Tune4	Delete

Restart	Close

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Using Navigate Pro

This section covers the day to day use of Navigate Pro, any changes that occur where in a different operational mode (SSL (Secure Socket Layer), Centralised Partner, Partner or Softphone) will be highlighted.

Making an Outgoing call

Dial the extension or ISDN number by entering it in the Number Entry Field in the main Navigate Pro window.
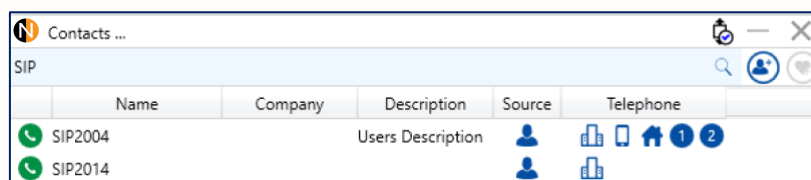
If your user has been given restricted contact status, then the Number entry field will show orange. This means that when entering a number, only internal numbers will be shown.

(You can also use your handset if in Partner mode)[1]

As you enter the number or name the Contacts window will be displayed showing you matches against the number or name you are calling.

Press the enter key to make the call (Or use your phone to make the call)

Navigate Pro by default integrates with SelectVoice's comprehensive contact database, but it also has the ability to integrate with Microsoft Outlook and Skype for Business[2] So if the person you are looking for is either in Outlook or Skype contacts they will also be displayed in the contacts window with an icon in the source column telling you where the contact was found.

SelectVoice Contact Database   Outlook Contact.

In each case the Work, Mobile and Home numbers are shown if populated in their respective contact database.

Work Number   Mobile Number   Home Number

To call that person click on the appropriate icon or press return to call the number entered in the number entry field.

The call Panel will display the outgoing call details, if you wish to cancel the call, click on the CANCEL button.
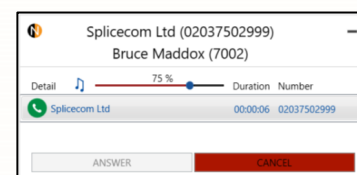
Notes:

[1] If you are calling an extension and it is busy or not answered within 20 seconds (default) you will be passed
   to voicemail, if enabled.

[2] Additional license's will be required if you wish to use Outlook or Skype For Business integration.

Entering additional digits

You may be required to enter further digits once a call has been made, for example when presented with an auto attendant or you need to enter a credit card number.

This can be done as follows:
Within the Call Status pane click on the Dial icon
The Keypad window will be displayed.
Select the number(s) required either by clicking on the numbers with your mouse or enter the numbers on your keyboard.
Use the Close icon at the top right to close the Keypad window when you have finished.

Account Codes

Accounts codes on a SpliceCom system enable calls to be tracked. This feature would be useful if you wish to bill customers for time spent on their job or calculate the cost of a project for example.
Please refer to your system administrator for further details if you wish to use this facility.

Once configured on your system, you can apply the relevant account code to a call.
From Call Status click on the Add Account Code icon AC
the Enter Account Code window will be displayed. Enter the code required and select OK.
(Please refer to your system administrator for the relevant digits to enter.)
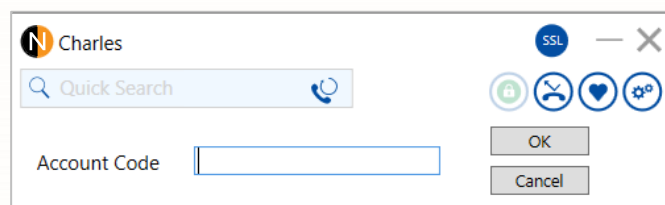
Mute call

The Mute facility will allow you to prevent a caller from hearing, for example, your conversation with another colleague. You will be able to hear the caller, but they will not be able to hear you.

Click the Mute icon from the Toolbar the Mute icon will be displayed with a red cross to indicate that this facility is on click this icon again to talk to your caller.

Redialling a number

To redial the last number, you called hover the magnifying glass, in the Number Entry field, the last number you called will appear, click to make the call.

To Call a Previous Caller Back

Click the call history button

A list of previously made, received and missed calls will be displayed, select the call you wish to call back and double click on the highlighted line to make the call.
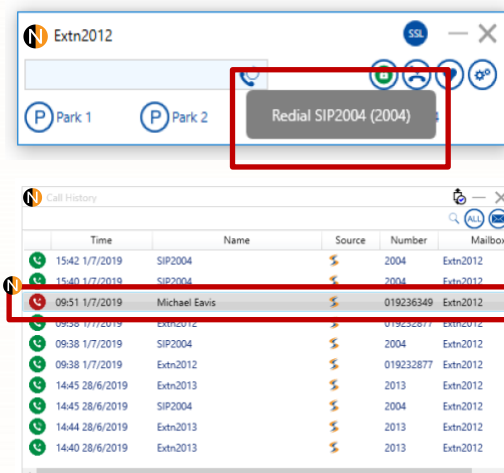
If you wish to call the person back on another number Single click on the source icon to see the other numbers, you can use.
Depending on the database the person is in the source icons could be:

SelectVoice Contact Database

Microsoft Outlook contact.
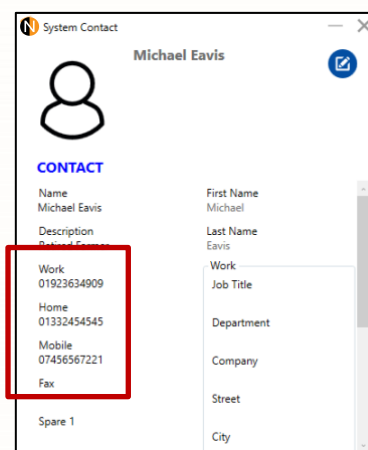
Receiving an incoming Call

The call panel will pop showing you the calling party details, click on the Answer button to answer the call.

If you do not wish to answer the call press the Cancel button the call will be passed to your Forward on Busy number (if set), or to voicemail (if enabled), or cancelled. (If your phone is busy or not answered within 20 seconds (default) the caller will be passed to voicemail, if enabled.)

If for some reason you miss a call, you will see a missed call alert, clicking on the Information button will open the call history window so you can see the call details.
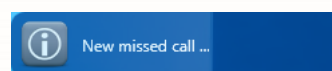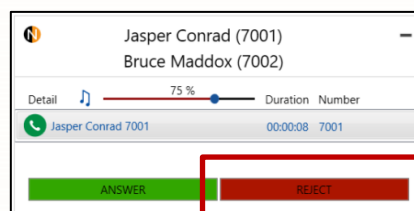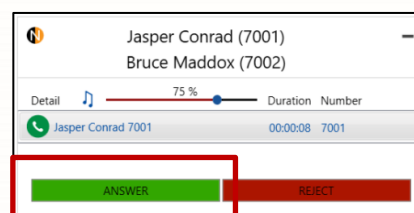
Receiving a department call

If you take calls for a department then you will
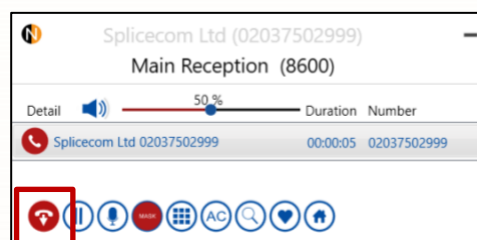See the department name shown so that you
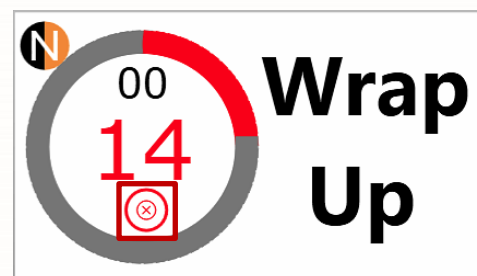Can answer the call accordingly.
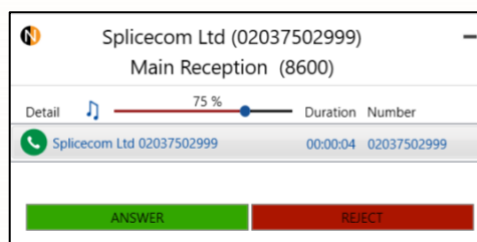
Ending a Call

To end a call, click on the 📞 icon in the call panel
or hang-up the call on the phone if Navigate Pro is
in partner mode.

If you have ended a department call you may see
a Wrap up timer, this allows you to finish any
paperwork you may need to complete. You can
cancel the wrap timer by clicking on the cancel
wrap button.⊗

Placing a Call on Hold

Click the Call Hold Key to place the call on hold. ⏸
To retrieve the call, click the Call Hold Key again
If Navigate Pro is in Partner mode, you can also
use your phone place the cal on hold. Please refer
to your phones manual on how to do this.
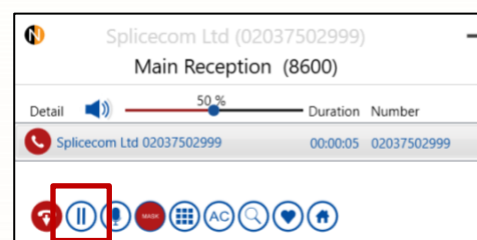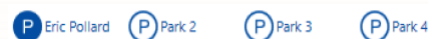
Parking and Picking up a Call

The Park facility on a maximiser system allows a call to be put on hold in a system area rather
than on the user's extension. This has the benefit of releasing the user's extension to receive
further calls. Either the user can pick up the call to continue the conversation or the call can
be picked up by another extension on the system.

By default, you will be given access to Park slots 1, 2, 3 and 4 via the four Park icons displayed
in the main Navigate Pro window. By default, all your colleagues using Navigate Pro or
PCS 58x/57x/56x and Yealink phones will also have access to these same park slots. (This
default configuration may be different on your system, please refer to your system
administrator for further details.)

When on a call click one of 4 Park keys to park the call[1]

Ⓟ Park 1　　Ⓟ Park 2　　Ⓟ Park 3　　Ⓟ Park 4

The caller's details (Name or Number) will be
displayed against the relevant Park Slot, to pick up the
call Identify the person you wish to pick-up and click
the button for the relevant park slot.

Ⓟ Eric Pollard　　Ⓟ Park 2　　Ⓟ Park 3　　Ⓟ Park 4

Notes:

[1] The SelectVoice system has 4 park slots as default, these can be removed, decreased or added to, please refer to the
  User manual for your system to do this and the section on Favourites later in the manual.
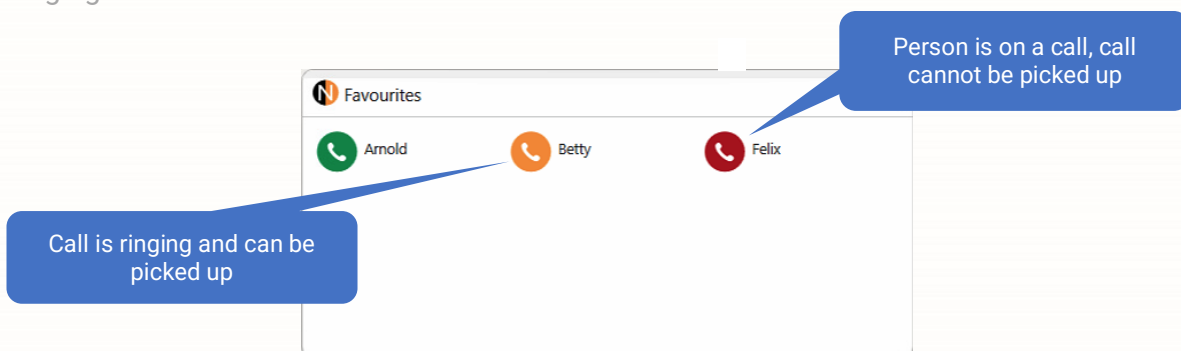
Picking up a Call

There are several ways that you could pick up a call:

Favourites

When a call is ringing on a user of a department, and you have that user or department set as a favourite you will see the colour change from green to orange. Clicking on the favourite will pick-up the call that is ringing.
Your system administrator may also have setup a global pick-up where you can pick up any ringing call.

Person is on a call, call cannot be picked up

Favourites

Arnold   Betty   Felix

Call is ringing and can be picked up

Call Select

The Call Select feature[1] allows a user to be logged into 3 devices at the same time (Desk phone, iPCS and softphone) if you answer a call on your desk phone and want to pick the call up on Navigate Pro then by pressing the Blue Globe[2] you can move the call from the current device to Navigate Pro.
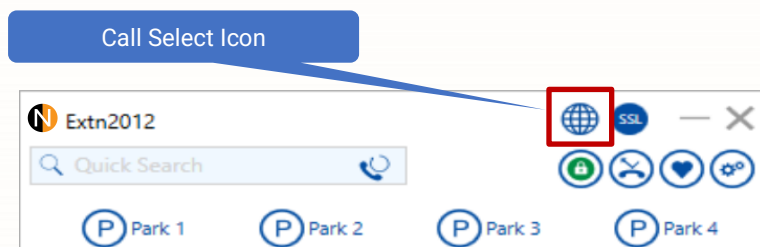
Call Select Icon

Extn2012

Quick Search

Park 1   Park 2   Park 3   Park 4

www.splicecom.com

Transferring a call

When you are on a call you may need to transfer that call to another person, Navigate Pro allows you to either do an Announced Transfer (You speak to the caller the call is being transferred to first) or a Blind Transfer (You transfer the call direct without talking to the person you are transferring the call to). Calls can be transferred to External as well as internal numbers.
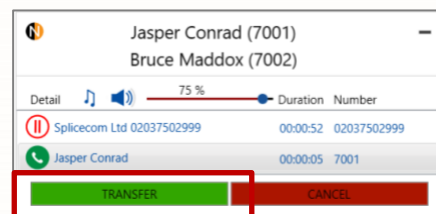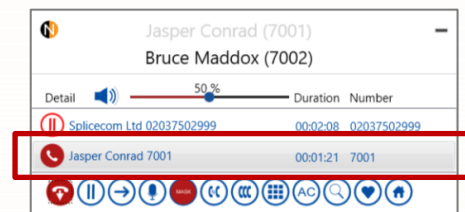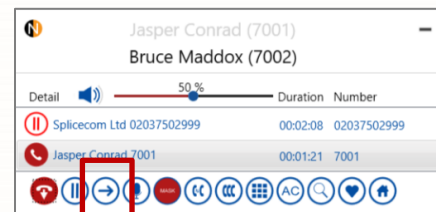
Announced Transfer

Place the call on hold by clicking the Hold icon (II) Then entering the number you wish to transfer the call to in the Number Entry Field and then pressing return. Please refer to your phones user manual to perform this process on your phone.

Alternately enter number you wish to transfer into the Number Entry Field and press return, your current call will automatically be placed on hold.

When the called party picks up the call, announce the transfer and then click the Call Transfer icon to complete the transfer.

To return to the original call, make sure the current call is highlighted in the Call Panel and then click on the Hang-up Icon.

Blind Transfer (un-announced transfer)

To Blind transfer a call to another user without talking to them, enter the number you wish to call into the Number entry field.

Wait for the called parties phone to ring and then click the Transfer Button.

Transferring a Call Directly to a Colleague's voicemail

If you know the person you wish to transfer the call to is away or in a meeting, you can transfer a call directly to that person's voicemail.

To do this place the call on hold the by clicking the hold icon (II)

Dial the internal number prefixed with a #[1] i.e. #10080 if you wanted to transfer the call to Extn 10080's voicemail.

Press the Transfer key again to complete the transfer.
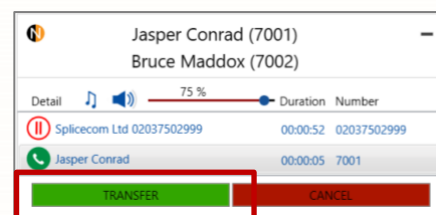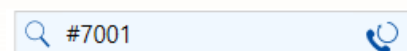
Notes:

[1] Your SelectVoice system could be setup differently, please refer to your system Administrator for details.
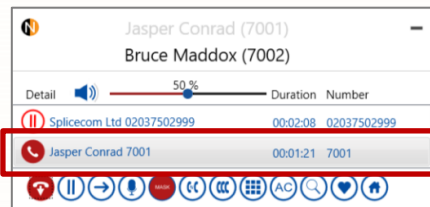
Conferencing a call

If you are on a call and wish to conference another person into that call, enter the Ext of the person you wish to join and press enter, your existing call will be placed on hold whilst the new call is ringing.
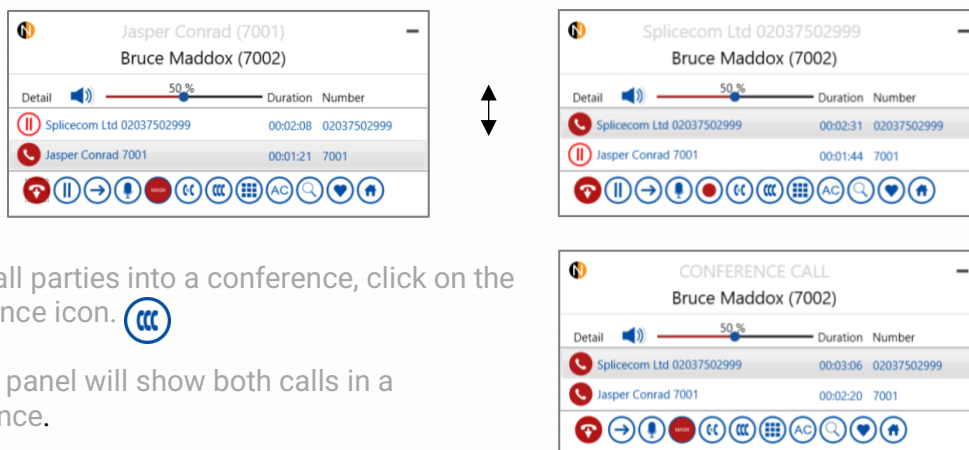
(You can use the search facility or your favorites as well)

🔍 7001 📞

The existing call will be placed on hold.

You can switch between the calls by clicking the switch icon in the call panel the switched call will be placed on hold.

To join all parties into a conference, click on the Conference icon.

The call panel will show both calls in a conference.

Cancel a conference call

You may wish to cancel the conference and return to a 2-way conversation with your calls by pressing the switch icon

You can return to a conference with your two calls at any time by selecting the Conference icon.
If you select either of the Hang Up icons while on a conference, you will hang up the caller that you were last speaking to before creating the conference and return to a 2-way conversation with the other call.
It is best to cancel the conference and return to a 2-way conversation first before attempting to hang up a caller.
If one of the conference members hangs up, you will return to a 2-way conversation with the other caller.

End a conference call (partner mode only)

If you replace your handset while on a conference call, you will end the conference and hang up all the calls.

Call Waiting

When a second call is received you will hear an intermittent beep via your telephone handset (partner mode) or Navigate Pro software, and the Call Waiting message will appear on the Navigate Pro call panel.
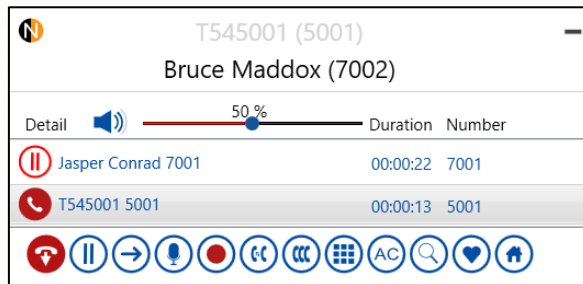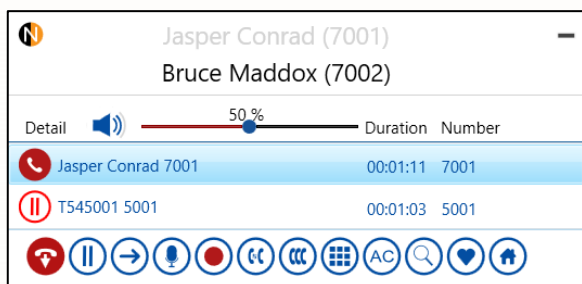
You can either hang-up your existing call by clicking on the hang-up button 📞 and answering the new call.
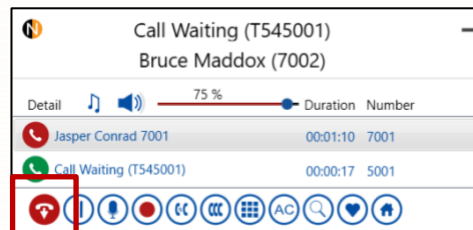
Alternatively, you can click on the new call, this place's the existing call on hold and allows you to answer the new call.
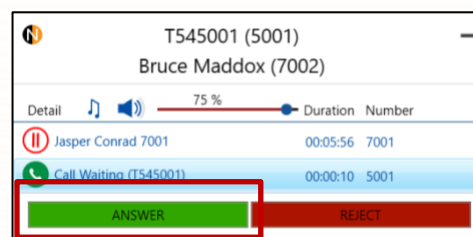
You can then switch between both calls, by clicking on the call you want to talk to, the call you were previously on will be placed on hold.
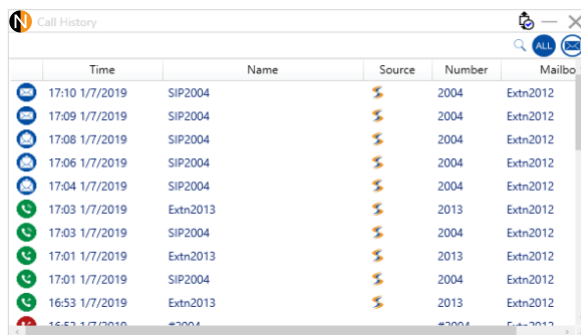
Using Voicemail

Navigate Pro allows you to access your voicemail by clicking the Message/Missed calls 😣 icon to show your messages and missed calls, if you have any unread messages left for you the message indicator ✉ will flash, alerting you to any messages.
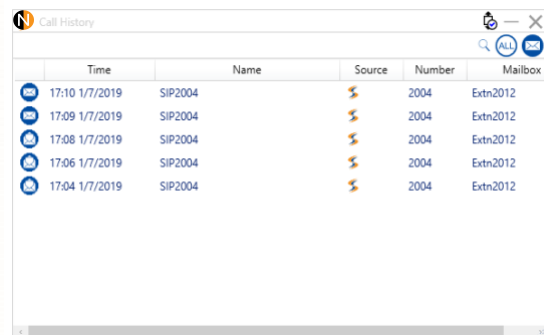
You will also receive a message in the Microsoft™ message notification centre.

Navigate Pro
New or unread voicemails ...
Navigate Pro
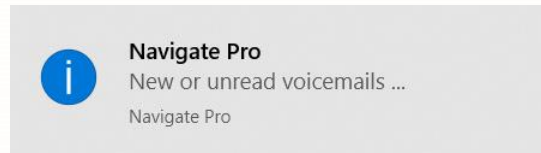
Click the Message/Missed calls icon to show your messages and missed calls, if you wish just to see your messages click the message only icon ✉

To play a new message ✉ or an existing read ✉ click on the corresponding icon. Whilst your message is being played you can use the navigation icons to:

Click ⏭ to skip forward 2 seconds
Click ⏮ to skip backwards 2 seconds
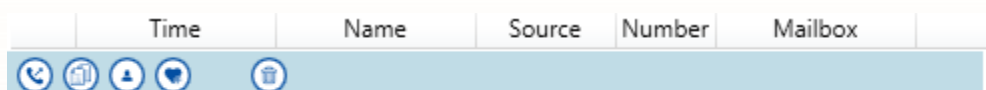
Click ▶ to play the next message
Click ◀ to play the previous message

Click 🗑 to delete the message
Click → to forward the message
Click ⏬ to save the message
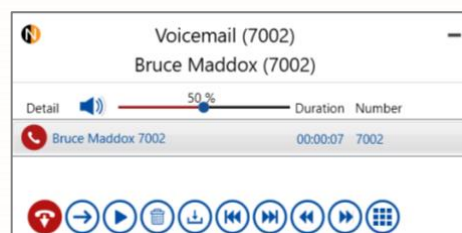
Voicemail forwarding must be enabled for this to work.

To call the person back who left the message, right click on the message and click the handset icon 📞

Navigate Pro Outlook Integration.

If you use Microsoft Outlook for your calendar and for storing your contacts, your user account can be configured to enable you to turn on Outlook Contact Lookup and Outlook Calendar Lookup in Navigate. Outlook Contact Lookup will enable Navigate to search within your Contacts so that you can easily and quickly dial numbers stored in your Outlook Contacts. You can also set a Dial Hot key which will enable you to dial numbers stored within a Microsoft document or within a website viewed via Internet Explorer.

The Outlook Calendar Lookup will enable Navigate to turn on Do Not Disturb if you have an appointment scheduled that is set as Busy or Out of Office, and if that appointment contains one of the five Out of Office Messages (In Meeting, At Lunch, On Holiday, Off Site and In the Office) in the body of the appointment this will set your Out of Office message at the relevant time.

If you have Outlook Integration enabled when you Navigate Pro it will connect and synchronise your Outlook contacts.
Any changes made to the Outlook contacts will Automatically sync to Navigate Pro.

If for any reason Navigate Pro loses connection with your Outlook profile you will see a red Outlook logo on the Navigate Pro main window.
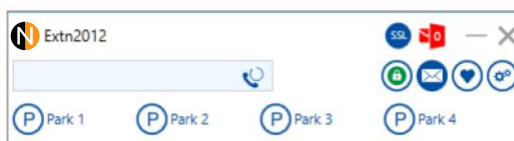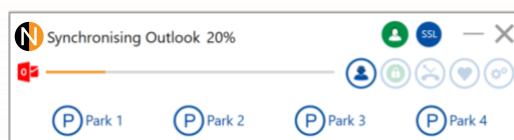
Searching Outlook contacts within Navigate Pro

When Navigate Pro is configured to search for contacts within Outlook as well, the Contacts window will show these by putting the Outlook logo in the source column of Contact window.

Clicking on this will show the contact card for that person, if there if there are other telephone numbers for that contact you can click on them to make a call as well.
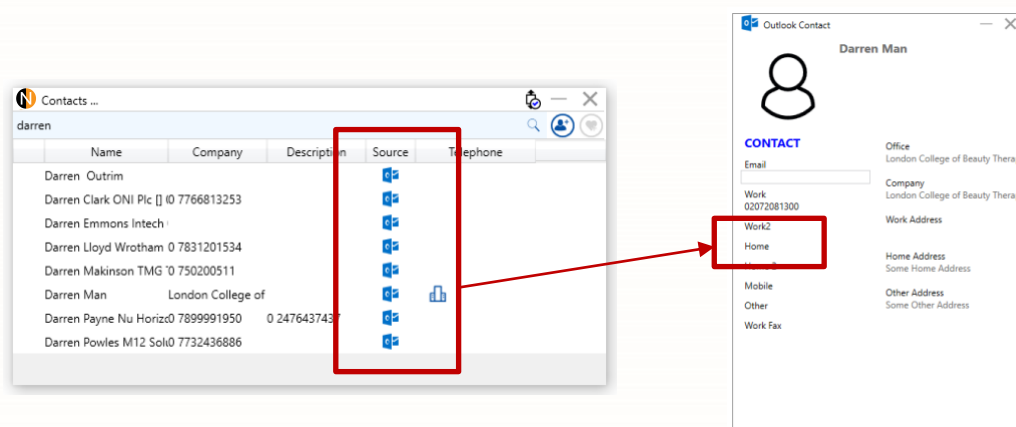
To call the selected contact click on one of the icons shown in the Telephone column.
Work Number   Mobile Number   Home Number

Navigate Pro Vision call centre integration.

If a user has been given a Vision agent licence, then Navigate Pro will detect this and automatically enable the Vision call centre features.

Agent State

Agent Actions
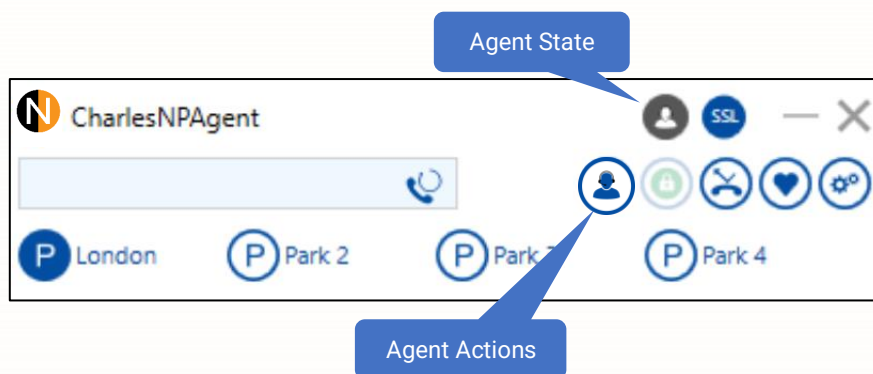
Agent State

This icon shows your status within the call centre.

As an agent you are available and ready to take calls.

As an agent you are not available or on a call.

You are logged out from the call centre, no call centre calls will be presented to you, however extension, DDI and non call-centre department calls will still be presented to your phone.

Agent Actions

This icon allows you to login and logout of the call centre, raise a Help flag with your call centre supervisor or set your busy not available status.

Logging in and out of the call centre

In some circumstances a user might be given the ability to Log in and Out of the call centre, an example of this might be to allow you to assist in busy periods by taking some calls. To do this you must be logged into the call centre[1] to log into the call centre:
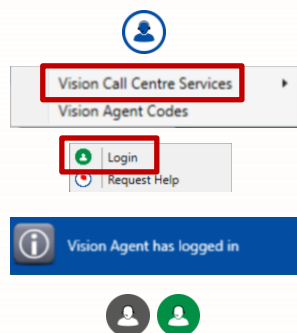
Click on the Agent Actions icon.

Select Vision Call Centre Service from the menu.

Click Login.

You will see a confirmation message.

You agent state icon will change to green to show that you are ready to take call centre calls.

[1] Three Special speed dials are temporally created when an agent log's in ($agenthelp, $agentlogout, $login) these should not be removed.
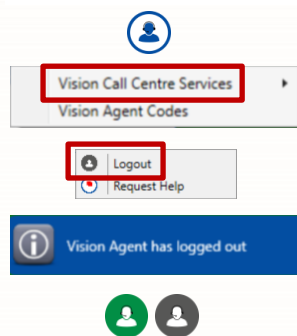
Click on the Agent Actions icon.

Select Vision Call Centre Service from the menu.

Click Logout.

You will see a confirmation message.

Your agent state icon will change to grey to show that you are logged out from the call centre.

Raising a Help Flag

If for any reason you need to summon your supervisor or require assistance, Navigate Pro allows you to raise a help flag, this will be seen on the supervisor's screen. (Please refer to the Vision call centre manual for supervisor actions)

When you are on a call you will see the help Icon in the call panel. Click on this to raise the help flag.
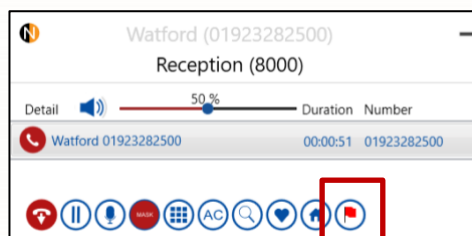
To raise a help flag when not on a call:
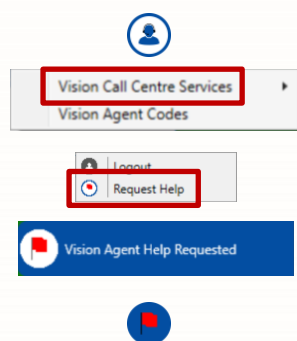
Click on the Agent Actions icon.

Select Vision Call Centre Service from the menu.

Click Request Help.

You will see a confirmation message.

You will also see a Help raised icon on the navigate Pro main window.

Your supervisor has the ability to clear the help flag, if you no longer require assistance, to cancel the Help Flag:
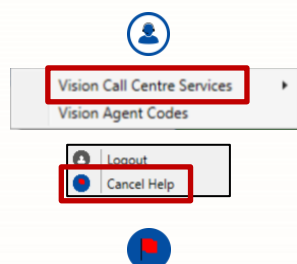
Click on the Agent Actions icon.

Select Vision Call Centre Service from the menu.

Click Cancel Help.

The help flag will be removed from the Navigate Pro main window and from the supervisor's screen.
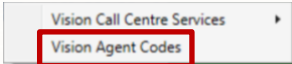
Setting a Busy/Not Available status

Navigate Pro has the ability to set Busy Not Available codes. These codes are used to tell the supervisor that you have stopped taking calls for a specific reason EG a comfort break. Depending on how the call centre is setup there may be a few, many, or no codes for you to choose. Please refer to your supervisor for help on this.
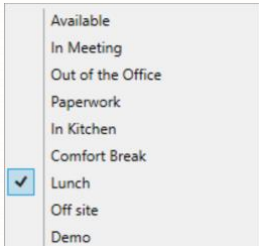
To select a Busy Not Available code:

Click on the Agent Actions icon.

| Vision Call Centre Services ▶ |
| Vision Agent Codes |

Select Vision Agent Codes

| Available |
| In Meeting |
| Out of the Office |
| Paperwork |
| In Kitchen |
| Comfort Break |
| ✓ Lunch |
| Off site |
| Demo |

Select a reason code from the list presented.
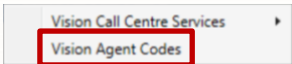
Your agent state will change from Available to Not Available[1]
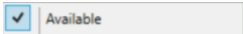
To make yourself available again:

Click on the Agent Actions icon.

| Vision Call Centre Services ▶ |
| Vision Agent Codes |

Select Vision Agent Codes.

| ✓ Available |

Select Available from the top of the codes list.

Your agent state will change from Available to Not Available.

---

[1] Your supervisor has the ability to override these settings.

Completion Codes and Wrap Up timers.

When you have completed a call, you may be given time to complete any paperwork or screen inputting required, this is known as wrap-up time. Navigate Pro will show a wrap up timer if one has been configured.

The wrap-up timer is a countdown timer showing you how long you have before you are placed in a state to answer the next call.

With 15 Seconds to go, the wrap up progress bar will change its colour to red to show its about to complete.

If you wish to clear the timer early you can do so by clicking on the wrap-up timer cancel icon.

Extended wrap up and Completion codes

Your call centre may have a feature enabled to extend the wrap timer, these will be displayed in red with a timer icon, select this from the list on the righthand side of the wrap-up timer[1]
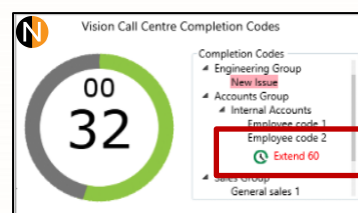
When selected the wrap-up progress ring will also change colour to purple to show that extended wrap-up has been selected.1

When a call is completed, you may also be given the option to select a completion code[3], this is a marker that's placed against your call that explains what type of call it was e.g. an enquiry or a new customer[2]
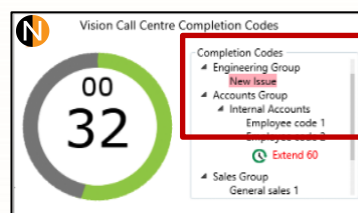
[1] This will set the timer back to the value set not add the time to the existing counter value set by the system.

[2] When a completion code is selected the wrap timer is cancelled.

[3] Completion codes can be grouped into logical sections for easy selection, please refer to the Vision Call centre setup and configuration guide for details on setting up completion code groups.

Picking up a parked call and making a new call whilst in wrap-up

Whilst you are in wrap-up it is possible to pick up a parked call or to make another call to another extension or an external number.

When you pick-up or make a call, you will first be prompted if you want clear wrap-up first; if you select yes then you will be able to continue picking up or making the call, selecting no will return you to wrap-up.
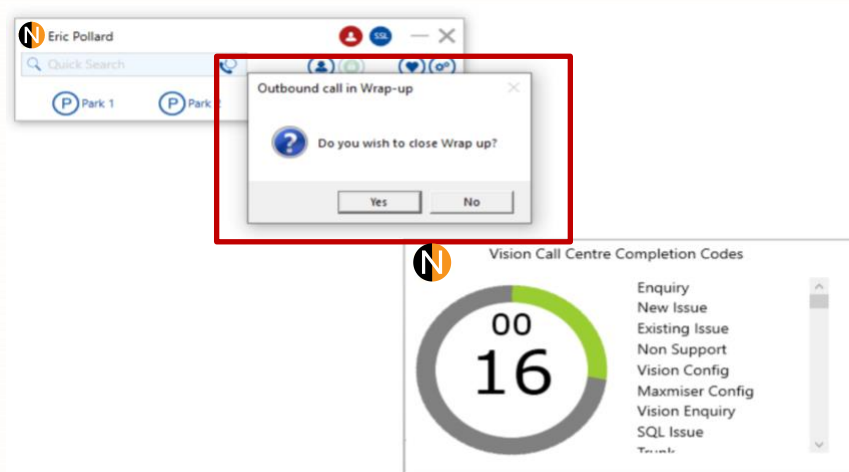
Appendix A

Introduction

The Navigate Pro installation program is a universal installation program designed to make the installation of Navigate Pro available to many deployment environments. It will allow reseller engineers to automatically install the latest version of Navigate Pro together with support packages for Plantronics headsets if required.

The installer also allows the use of command line installation so you can use a software deployment tool.

If you need to load a previous version of Navigate Pro or your system does not have internet connectivity on the PC you are installing to, then please call SpliceCom support for instructions on how to do this.

Installation Prerequisites

Operating systems:

Navigate Pro is designed to work on **Windows 10** and above, **Windows Server 2016** and **2019** for **partner mode only** working for remote desktop deployments.

Registry Access and Profiles:

- It is assumed that all users/profiles and permissions have been setup correctly prior to installation.
- NavigatePro will require access to the user's registry specifically:

  Computer\HKEY_CURRENT_USER\Software
  Computer\HKEY_LOCAL_MACHINE\SOFTWARE

- NavigatePro will require access to the users\%username% directory.

Installation User

It is essential that the user who installs Navigate Pro has local Administrator permissions, Domain Administrators cannot install Navigate Pro directly.

Internet

For the installer to get the latest version of the installer the PC must have a working internet connection.

Installing NavigatePro

Download the installation file by using the link from the Splicecom forum within the Navigate Pro thread, depending on the browser you may be asked if you wish to run the downloaded file, alternatively, locate the installation file (Normally found in your Downloads folder) double click to run.

Click yes to the "Do you want to allow this app to make changes to this device?
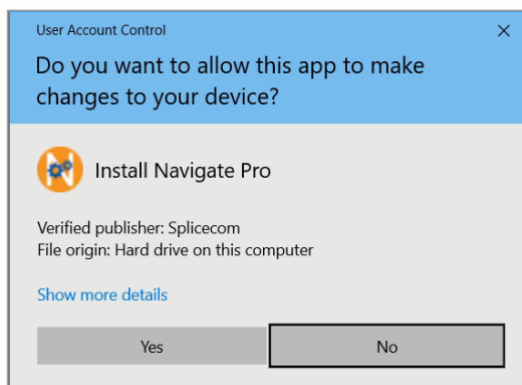
The installer window gives you 5 options to choose from:
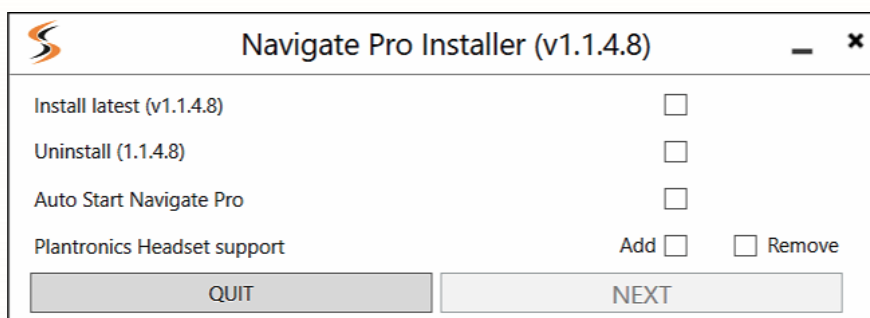
Install Latest   Check to install the downloaded version of Navigate Pro.

Uninstall   Check to fully uninstall the installed version of Navigate Pro. This will remove ALL files and settings.

Auto Start   Check if you want Navigate Pro to startup automatically when you login to Windows™

Plantronics Headset   If you are using a Plantronics Headset check to install the Plantronics Windows drivers.

The Navigate Pro installer will download the version of Navigate Pro that is the same as the installer from Splicecom's servers, If the installer detects that there is no internet access available it will give you a chance to select a local installation file.

Installing NavigatePro (Continued)

Click NEXT to continue with the installation

Navigate Pro Installer (v1.1.4.8)

Install latest...8)	☑
Uninstall	☐
Auto Start Navigate Pro	☐
Plantronics Headset support	Add ☐ ☐ Remove

QUIT	NEXT
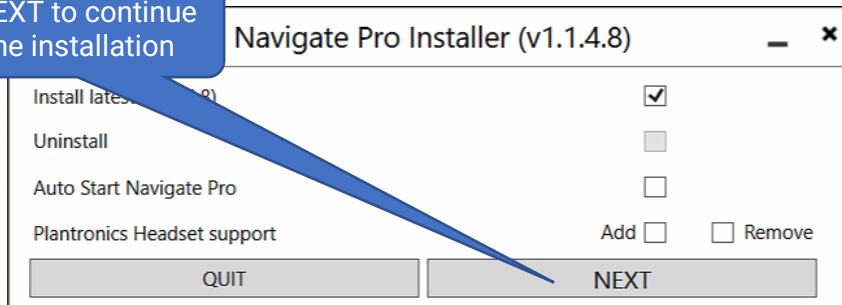
The installer will first check to see if Navigate Pro has already been installed

If the installer finds the Navigate Pro installation file in the same directory as the installer it will prompt you asking if you want to use the local file.

Navigate Pro Installer (v1.1.4.8)

Install latest (v1.1.4.8)	☑
Uninstall	☐
Auto Start Navigate Pro	☐
Plantronics Headset support	Add ☐ ☐ Remove

NavigatePro.1.1.4.8.zip Existed

NavigatePro.1.1.4.8.zip is already exists

Use this file?

Yes	No
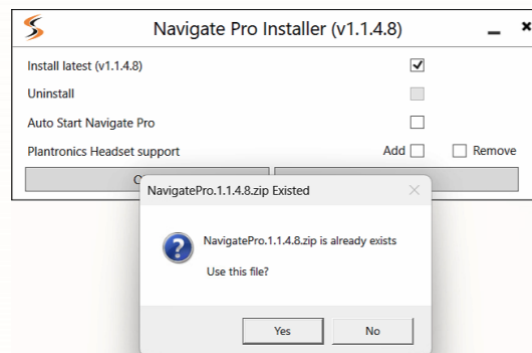
If there is no local file, the installer will proceed to download the installation file.
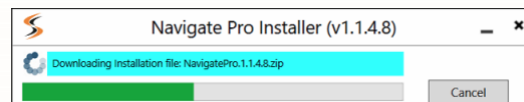
However, if the installer detects there is no internet connectivity, then it will bring up the explorer window, which will allow you to select an appropriate installation file.

Navigate Pro Installer (v1.1.4.8)

Downloading Installation file: NavigatePro.1.1.4.8.zip

[Cancel]

Installing Navigate Pro

Installing Navigate Pro ...

[Cancel]

Installing Navigate Pro

Installation Complete

[Close]
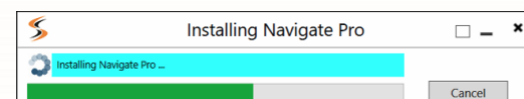
Once downloaded Navigate Pro will be installed and then you will be prompted if you want to launch Navigate Pro.

Installation complete

Installer will quit.

Launch NavigatePro?

Yes	No
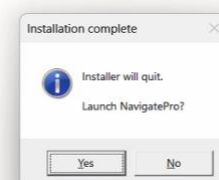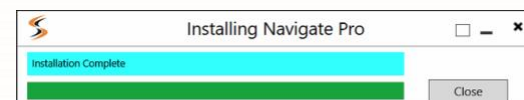
If this is the first time Navigate Pro has been installed on the PC and you have been using an earlier version of Navigate, the installer will pick up the previous settings and copy them to Navigate Pro.

Uninstalling Navigate Pro

Navigate Pro 1.1.4.x installer now gives the option to fully uninstall the previous version and all its settings.

Check the Uninstall option and then OK to Confirm uninstallation.
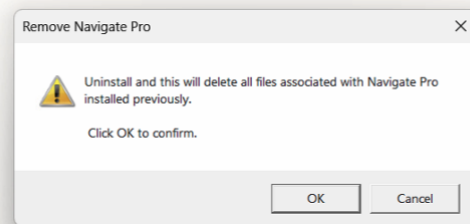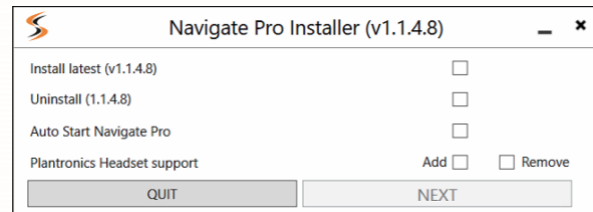
Click next to complete the uninstallation Process.
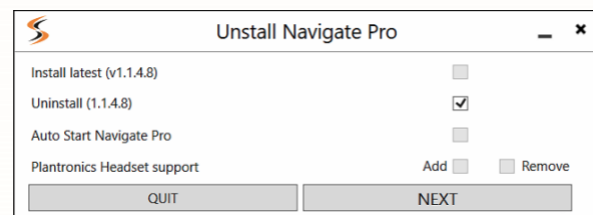
The installer will then proceed to uninstall Navigate Pro.

Click OK to complete the uninstall.
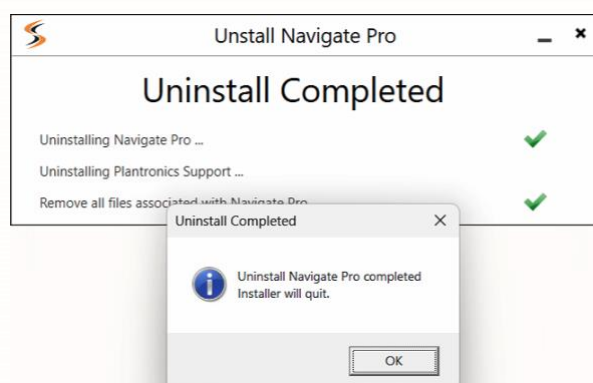
Navigate Pro Install Wizard

Navigate Pro now has a quick setup wizard that allows you to enter in basic user information to get up and running quickly. The Wizard will only run if Navigate Pro has been uninstalled or has been installed for the first time on a system.

If you are using SV1.6.x Navigate Pro now acts like other Splicecom products and will automatically login as the entered user, so you no longer have to go to unassigned phones and make it a member.

The Wizard will allow you to select one of 5 types of user configuration and assumes that the user has been created on the SV Server.
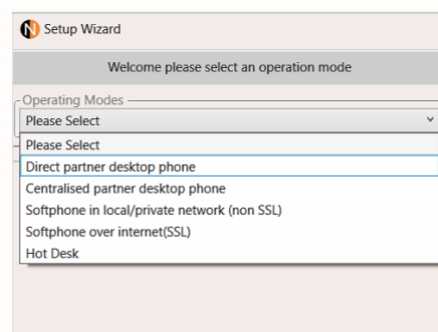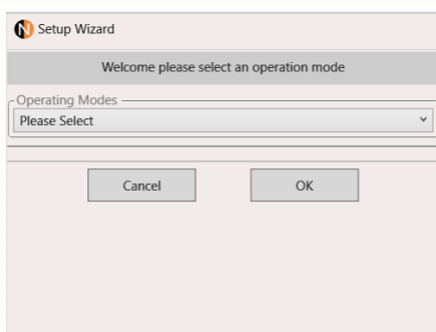
Direct partner desktop phone.

Use this option to connect directly to
A Splicecom PCS Phone.
Enter the IP Address of the phone and the
Login code setup for that phone device.
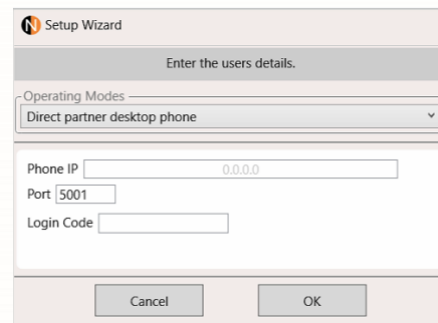
Centralised partner desktop phone

Use this option to partner a Yealink or a
Splicecom PCS Phone.
Enter the IP address of the SV server the
Phone is registered to, followed by the users
Extn and Login access code.
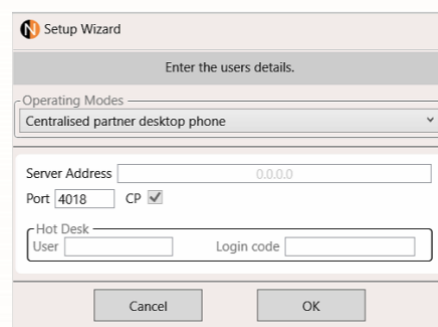
Softphone in local/private network (non SSL)

Use this option to setup a local (In Office)
Softphone, enter the local IP address of the
SV Server and then enter the users Extn and
Login access code.

Softphone over internet (SSL)

Use this option for remote workers, enter the
Public IP or FQDN of the SV Server followed
By the users Extn and Login access code.

Hot Desk

Use this option where multiple users have
Access to the same PC. The user will be asked
To enter their own Extn and Login access code
When Navigate Pro starts up.

Navigate Pro Installer (Command Line Options)

The Navigate Pro installer can be incorporated into an install script so that a software deployment tool can be used.

The following command line options are available (Replace x.x.x.xx with the version number)

Install Navigate Pro with a valid installation file in the same folder as the installer.
InstallNavigatePro.x.x.x.xx.exe -file "NavigatePro.1.1.1.104.zip"

Install Navigate Pro an installation file being different folder.
InstallNavigatePro.x.x.x.xx.exe -file "C:\download\NavigatePro.1.1.1.104.zip"

Install Navigate Pro with Plantronics support.
InstallNavigatePro.x.x.x.xx.exe -file "NavigatePro. 1.1.1.104.zip" **-plantronics add**

Install Navigate Pro and remove Plantronics support.
InstallNavigatePro.x.x.x.xx.exe -file "NavigatePro. 1.1.1.104.zip" **-plantronics remove**

Install Navigate Pro and **DO NOT** launch NP on completing the installation.
InstallNavigatePro.x.x.x.xx.exe -file "NavigatePro. 1.1.1.104.zip **-launchNavigatePro n**

So that any batch scripts you may use can get feedback from the silent install the following values and text strings are returned from the Navigate Pro installer

Return Code	Return Text
0	SUCCESS_NO_ERR_CODE
1	INSTALLATION_FAILED
2	INSTALLATION_FILE_NOT_FOUND_ERR_CODE
3	INSTALLATION_FILE_CORRUPTED_ERR_CODE
4	NO_ADMIN_PRIVILEGE_TO_MAKE_CHANGE
5	FAIL_IN_DOWNLOADING_INSTALLATION_FILE

Installing Navigate Pro on a Windows™ server

Pre-requisites:

For Navigate Pro to work in a remote desktop environment the following conditions must be met.

- It is assumed that all users/profiles and permissions have been setup correctly prior to installation.
- Navigate Pro will require access to the user's registry specifically:

  Computer\HKEY_CURRENT_USER\Software
  Computer\HKEY_LOCAL_MACHINE\SOFTWARE

- Navigate Pro will require access to the users\%username% directory.
- Navigate Pro will require access to the created profile directory.

To install Navigate Pro on the server follow the normal installation instructions as described previously.

Setting up NavigatePro user extensions

When Navigate Pro has been installed it will also install some sample server template files these are example files for reference and can be found in the:

\Programe Files (x86)\Splicecom\Navigate Pro\res\ServerTemplates directory.

User_Info_Site_A_Template.xml	This is an xml file of the NP user settings.
UserInfoTemplate.csv	CSV File which is used by NP to match the users details against the windows user.
UserInfoTemplate.xlxs	The UserinfoTemplate.xlxs is an excel editable file of UserInfoTemplate.CSV, if used then the file **MUST** be **exported** as a CSV after all the changes are made.

If you have multiple SelectVoice servers then you can configure a separate UserInfo file for each site, this gives you the flexibility to setup users for multiple systems and users and to be able to mix between RDP and Domain logins with PC's.

Configuration flow chart

Install NavigatePro on the server using the Administrator user

Using the following flow chart to configure the NavigatePro users, all changes should be made on the server using the Administrator user.

Create the NavigatePro Profile directory

Copy the UserInfoTemplate.csv to the created directory and give it a suitable name

Using NavigatePro Configure a working Partner

To export the working settings to a file first enter the Development code (iddqd) in the User Configuration menu, go into the Development menu, tick the Export/Import User Settings and then select the file to use/create by clicking on the folder for File to Export/Import and then clicking on Export to Users.

Export the working settings

Edit the user Info file and amend to include the name of the exported settings, add the Windows user names and Extn and Login details

Configure the Windows users

Check that the RDP users work as expected

The User Info file is a comma delimited file that sets out what the Windows user[1] (As found under \users\user name) will use for their NavigatePro settings, it also has the information for the Extn and login code to use for that user.
Use can also setup softphones, but these settings are only for Domain users with Actual PC's, NavigatePro will not work as a softphone with users who use RDC.

[1]The Windows user name **MUST** match what has been setup on the Windows server, if it does not then that users NavigatePro will not load the setting's for that user.

User Info file example column information

Windows User	Import File	Partner Hot Desk No	Partner Hot Desk code	Softphone Hot Desk No	Softphone Hot Desk Code
Jimmy	C:\NavigateProUserSettings\NPUserSettings.xml	760	778258		

Appendix B

Navigate Pro Headset Support

- Jabra.
- Plantronics/Poly or HP.

Jabra and Poly headsets use their own unique interface for HID control, it is essential that the headset software for both manufactures is updated regularly.

Navigate Pro 1.1.3.x has a deep integration support for Yealink headsets and covers the listed headsets below:

- WH67   Premium DECT Wireless Headset

- WH66   Premium DECT Wireless Headset

- WH63   Essential DECT Wireless Headset
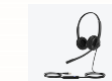
- WH62   Essential DECT Wireless Headset

- UH38   USB Wired Headset

- UH36   Professional USB Headset

- UH34   USB Headset

- CP900   Portable Speaker Phone

- CP700   Portable Speaker Phone

[1] Splicecom has found that on these specific headsets the base station working is limited to making outbound calls via Teams only unless using the non-Teams variants.

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