

# DATAPULSE



# Intuition 1000 Administration Training Guide

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### Intuition 1000

Intuition 1000 is a screen based console which replaces the switchboard with a PC.

Intuition 1000 comprises of the following modules

Switchboard	Allows the operator to process calls using a standard PC keyboard.
Person	A directory containing fields that the operator can search and extend a call on.
Absence	A register of absences against entries in the person module.
Topic	An additional database with information and telephone numbers. The operator can search on key words and numbers can be hyper linked so the operator can extend the call from the topic page.
Person Specific Announcement	Greetings recorded by the operators for a variety of call types.

### Optional modules

Operator Statistics	Historical and Real Time Operator statistics
PCN	Priority Call Notification. A call type can be given a priority i.e. Emergency, and the call will be the first to be answered.

### Logging on to your PC

To logon to Windows press Ctrl + Alt + Del keys together.  
Type in the password, this could be your network logon id.  
The default password for Windows is password.

### Opening and logging into the Switchboard module

Double click on the Switchboard icon on the desktop. The following will appear:



The image shows a dialog box titled "User Access control" with a blue header bar. Below the title bar is a green key icon and the text "Provide your login name and password". There are three input fields: "Database:" with the text "Intuition", "Login Name:" which is empty, and "Password:" which is empty. At the bottom of the dialog box are three buttons: "OK", "A\_bort", and "H\_elp".

Type in your Login Name and password if required.  
The Operator Module administrator will advise you if you have a password.  
The default Login Name for Administrators is admin.  
There is no default password.

## Switchboard Layout



## Menu Bar

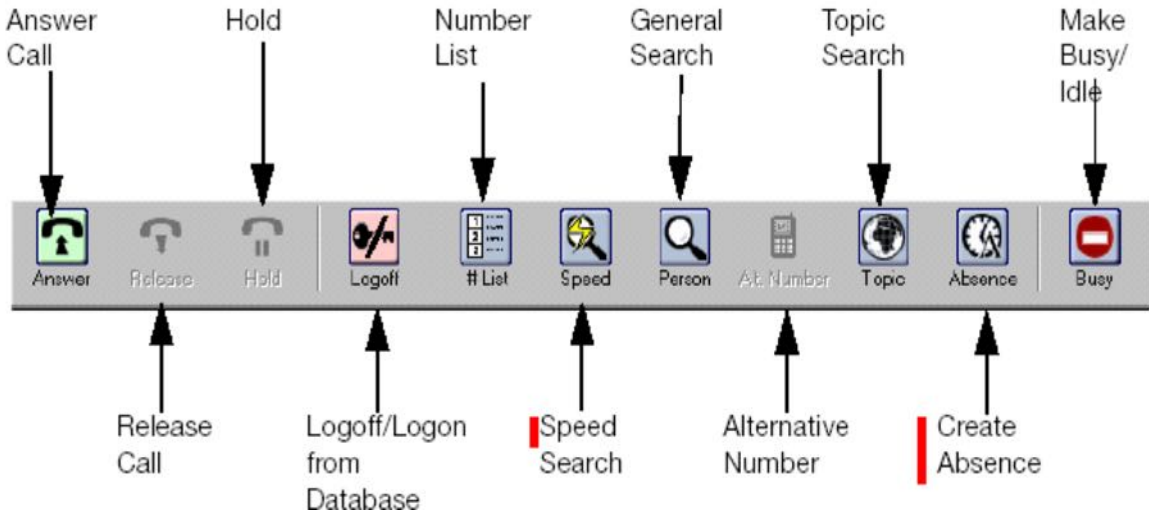
The top portion marked Answer, Functions, Features, Service, Options, Search, Help is known as the menu bar.

Answer	Functions	Features
Answer	=	
Release	Enter	
Hold	Del	
Selective Answer	F7	
New Line		



## Tool Bar

The toolbar definitions are displayed below:



These buttons are used by clicking the mouse or alternatively you can use the key pad and/or function keys for the same result.

## Queue Meter



The thermometer gives you the total calls waiting.

### Source Panel


Displays the information on incoming calls.



A screenshot of the Source Panel. It features a label 'Source' followed by the text 'Multiple'. Below this, there is a text input field containing '1601-1' and a button labeled 'External Call'.

### Destination Panel

Displays the information on the destination of a call.



A screenshot of the Destination Panel. It features a label 'Destination'. Below this, there is a text input field containing '8041' and a button labeled 'Kevin Williamson'.

### Hold Panel

	Hold Time	Src. No.	Src. Name	Dest. No.	Dest. Name
Alt+1	00:19	1601-1	External Call	8041	Kevin Williamson
Alt+2	00:10	1601-5	External Call	8048	Tony Fendall

Displays information on the calls held on the switchboard.

### Information Panel



There are two indicators in the first part of the Information Panel

The first indicator displays your Connection Status to your CIU/M2250 etc

Green = Connected, Red = Not Connected

The second indicator is your connection to the handset or headset.

Green = Connected, Orange = No Status Available, Red = Not Connected

### Switchboard Module Status

The second part of the information panel shows the status of the switchboard.

Status	Description
Idle	You are ready to take a call
Active	You are currently processing a call
Busy	Your Switchboard is currently unavailable, for instance, you are on a break.
Night	The Switchboard is in Night Service and cannot take any calls.

### Database and User display

The third part of the information panel shows the database and user login.

### Microphone and Handset/Headset Status

The fourth part of the Information Panel displays the Operators Microphone status by showing a Microphone icon, if the microphone symbol is crossed through it means it is muted. The operators Headset/Handset volume is shown as a percentage next to the microphone symbol.

### Date and Time





The fifth part of the Information Panel displays the current date and time.

### Alarm Display

The last part of the Information Panel is used to display faults. These include "Minor Alarm", "Major Alarm", "Intuition 1000 not connected to M2250" or "Headset/handset not connected".

## Graphic Symbols on the Switchboard

These are the symbols you will see as you process calls:

Symbol	Action	Description
	Speech	You can speak or hear another person
	Ringing	The Ringing symbol is displayed when the selected extension is ringing
	Busy	Indicates the number you have dialled is busy
	Dial	Indicates you can key in an extension or external number.

## Keyboard Layout

The function keys F1 to F12 are printed with the specific switchboard functions and are colour coded to match the shift or control keys

Ctrl (Green)		Display Calls Waiting	Message Indicate	Message Cancel
Shift (Orange)		Release Source	Barge In	Busy Verify
White	Help	Number List	Take Message	Redial
	<b>F1</b>	<b>F2</b>	<b>F3</b>	<b>F4</b>

Ctrl (Green)	Semi Automatic Camp-On	Serial Calls	End to End Signalling	Network Attendant Service
Shift (Orange)	Break In		Metering	3 Party Conference
White	Conference	Trunk Groups	Selective Answer	Change Speech Direction
	<b>F5</b>	<b>F6</b>	<b>F7</b>	<b>F8</b>

## INTUITION 1000 ADMINISTRATION

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Ctrl (Green)	Speed Call	Parking		Alternative Number
Shift (Orange)		Called Numbers	Create Absence	General Search
White	Emergency	Reconnect	Topic Search	Speed Search
	<b>F9</b>	<b>F10</b>	<b>F11</b>	<b>F12</b>

These functions can also be accessed from the drop down menus at the top of the Switchboard module.

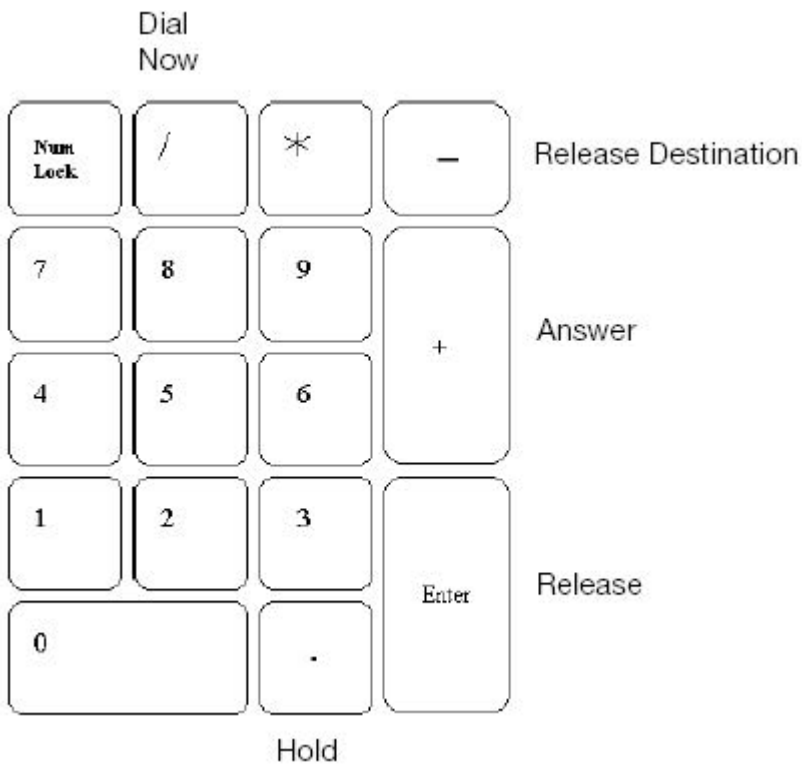
## Feature Key Definitions

<b>Key</b>	<b>Feature</b>	<b>Feature Definition</b>
F1	Help	Contains all Help files
F2	Number List	A speed list specific to a console
Shift + F2 Orange	Release Source	Release the caller in the Source field
Ctrl + F2 Green`	Display calls waiting	Displays calls waiting in the Queue, this is can be used if the 'Q' meter is turned off
F3	Email	You can send Emails, if the address is in person and you are linked to Outlook
Shift + F3 Orange	Barge In	To check the status of a Trunk line
Ctrl + F3 Green	Message Indicate	To register a message for an extension (if configured)
F4	Redial	Last number redial
Shift + F4 Orange	Busy Verify	To break in to check an extension status
Ctrl + F4	Message cancel	To cancel a message for an extension
F5	Conference	Setting up a conference call of up to 6 parties
Shift + F5 Orange	Break In	Breaking in of an established call
Ctrl + F5 Green	Semi Automatic camp on	This is used when call are always announced the call recalls to the operator when the line is busy
F6	Trunk Groups	To close and open trunk lines to the consoles
Ctrl + F6 Green	Series Calls	Automatic return of a call to console when internal call has been terminated
F7	Selective Answer	Operator selection of type of call to answer first
Shift + F7 Orange	Metering	Overseas Meridians only
Ctrl + F7 Green	End to End Signalling	Sending DMTF tones
F8	Change speech direction (Mute)	Control of muting calls between source and destination
Shift + F8 Orange	3 Party Conference	Speech between source, destination and console

Ctrl + F8 Green	Network Attendant Service	Multiple site networked Meridians
Ctrl + F9 Green	Speed Call	Setting up of speed call; pressing Ctrl F9 with a loop open will allow you to dial a speed dial no.
F10	Reconnect	To reconnect a recall
Shift + F10 Orange	Called Number	A list of the last 20 called numbers
Ctrl + F10 Green	Parking	Parking a call within the system
F11	Topic	Topic search
Shift + F11 Orange	Create Absence	Creating an absence
F12	Speed Search	Perform speed search
Shift + F12 Orange	General Search	More detailed search
Ctrl + F12 Green	Alternative Number	Alternative number search

## The Numeric Keypad

The numeric keyboard is shown below:



Note: The Num Lock light on the top right of the keyboard should always be lit.



## Switchboard Configuration

### Options

Under the Options menu you can tick any of the choices to assist in the operation & window presentation of the Switchboard.

- **Auto Answer** - Calls are automatically force fed to the operator
- **Auto Selective Answer** – The operator can select a type of incoming call from a list that is presented.
- **Auto Release** - Calls are automatically released from the switchboard.
- **Auto Busy** - Automatically activates busy position on the switchboard
- **Auto Focus** - If you are not active on a call and are searching the database the switchboard screen will be presented and a prompt appears.

**VIOC** – Only for use if the console has been configured for visually impaired operators.

**Num lock control** – Options are None/Always On/Always Off

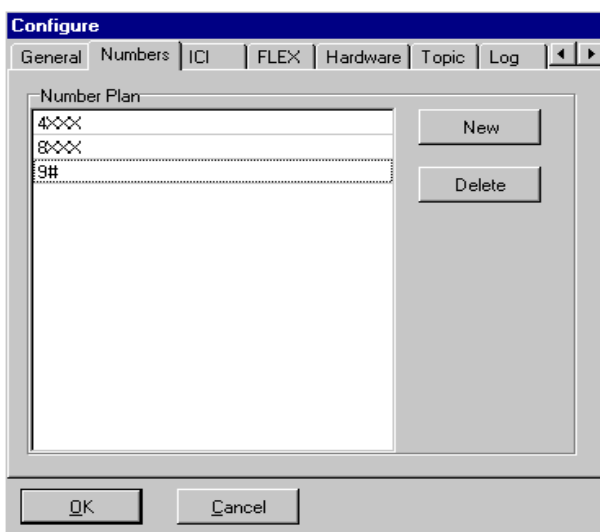
### Configuring Switchboard Options

Used for configuring hardware/software options relating to switchboard customisation. The tabs will vary according to hardware setup (whether Operator Gateway, 2250 or CIU connection.)

### The Numbering Plan

In order that the switchboard may dial external or internal numbers, the numbering range must be entered into the Numbering Plan. Select Options, select Configure. select the Numbers tab.

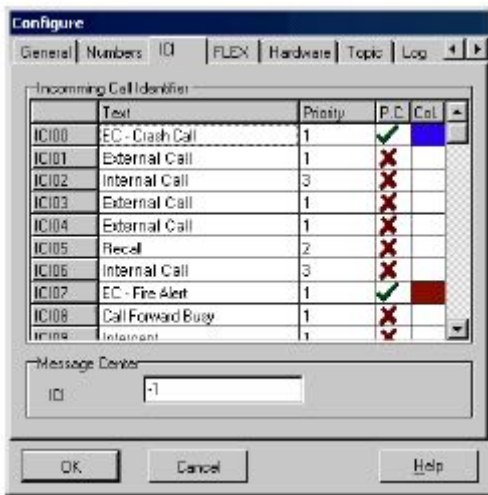
To add a new number in the plan, select New, type in the digits required. See example below:



N.B 9# is for external dialling, # represents free length, X represents a digit.

## Programming the ICI (Incoming Call Indicator) Keys

Select the Options menu and select Configure.  
 Select the ICI tab and type in the text required.

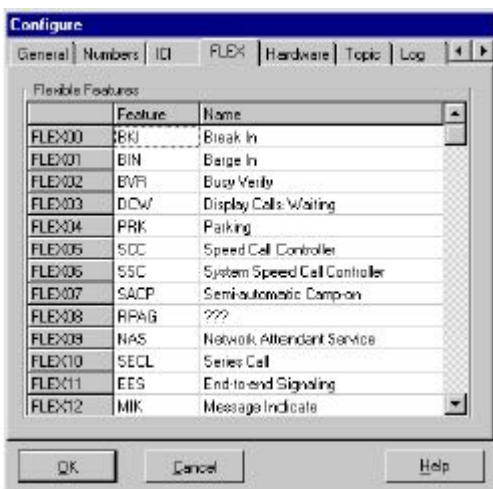


P.C. – Priority Call Notification  
 Col. – colour choice for PCN presentation

## Programming the Flex (Flexible) Features

Programming the flex keys enables you to use the flexible features programmed on the 2250 console. Examples of flexible feature keys would include the following -: Call Park, Break-in, End-to-end Signalling and many more. Not all customers have the same features. To program the keys click on Options then select Configure, click on Flex.

Double-click the left mouse button on the key required for programming; a list of flexible features will appear on the screen. To program the key, click on the feature required. Repeat this procedure until all required keys are programmed.





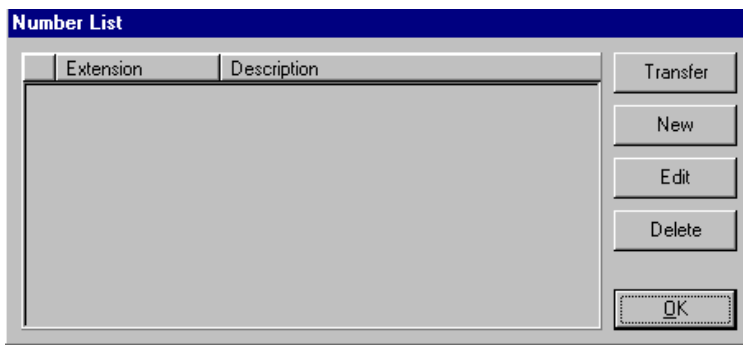
## Creating and using the Number List



The Number list is used to store frequently dialled numbers for each individual Switchboard. It can automatically dial internal, external or speed dial numbers, e.g. taxi companies, helpdesk, couriers, etc.

To insert a number into the number list, select the Search menu, select Number List from the drop down list (alternatively press F2).

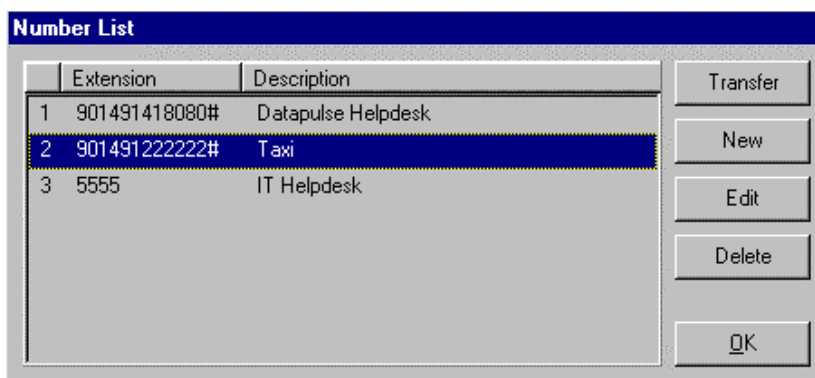
The following appears:



Select New to add the number.

N.B. If the number is external remember to include the access code, e.g. 908704424427 (Datapulse Technical Service Centre).

To use the number list, press the answer key to obtain a line, then press F2. The following appears:-



To dial a number you can double click on required number or select the number and then select Transfer to dial it. Alternatively type in the list number and press enter.

## Person Module

### Using the Hierarchy Tree

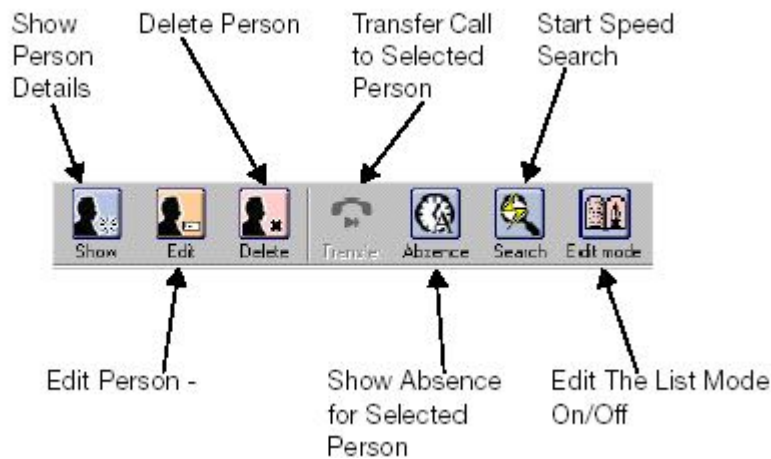
This tree is a visual representation of your organisation's structure.


To add a new folder, rename or delete folders to the 'tree', open the Person Module, then select Hierarchy Tab by either clicking on the tab with the mouse or pressing F5.

### The Hierarchy View Toolbar



### The Search View Toolbar

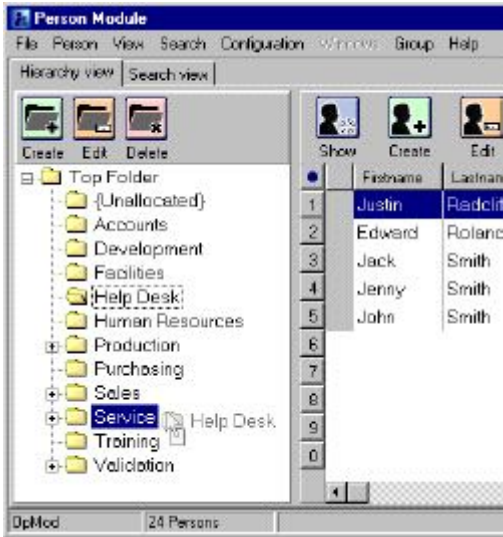


Using the buttons on the Hierarchy toolbar (Create, Edit, Delete) , you can then create your organisation structure (folders).

Person records can be moved between folders by 'clicking, dragging & dropping' them into the correct folder.

## Adding Records

To add a new record to the directory, open the Person Module, select the Hierarchy Tab by either clicking on the tab with the mouse or pressing F5.



New entries can then be added to the folder you want to put the record into in the hierarchy 'tree'. Select the folder, then select the Person menu or click the Create Person button on the toolbar and select Create person.

The screenshot shows the 'Person view - Create person' dialog box. It has two tabs: 'Person Record' (selected) and 'Home Details'. The title is 'Operator Module Database - Person Record'. It contains several input fields: Lastname, Firstname, Extension, Initials, Mobile Number, Pager Number, Alternative Number, Voicemail, Fax Number, Job Title, Department, Location, DDI Number, Email, Car Registration, Secretary Name, and Secretary Number. At the bottom are 'OK', 'Cancel', 'Clear', '<<', and '>>' buttons.

Enter the details as required. Select the OK button to save.

### Note for Connect Users

If you are using "Connect" (Connect info shown on Additional Info tab) refer to the Connect manual.

### Selection Fields

If a value is not shown on the list then click the button to the right of the arrowhead. The following appears:



Click on New and add the new value. Click on Ok. Click on Close and select the new value from the list

### Editing Records

#### Editing a single entry

To edit an existing entry, find the entry using the speed search (F12) ensuring the entry you want to edit is highlighted. Click on Person menu, then choose Edit. Make all necessary changes. Once completed, click on OK to save the changes.

#### Editing multiple entries

Editing multiple entries can only be used if the entries have a common denominator, e.g., the same department name, surname beginning with the same character, etc.. To do this, perform either a speed or general search. When all records are listed, select records by shift-clicking, click on Person menu, then click on Update selected. Make the necessary change then click on OK to save it.

### Deleting Records

#### Deleting a single entry

To delete an existing entry, find the entry using the speed search (F12). Highlight the entry to be deleted, Select Person and then Delete.Selected. Click Yes to confirm or No to cancel.

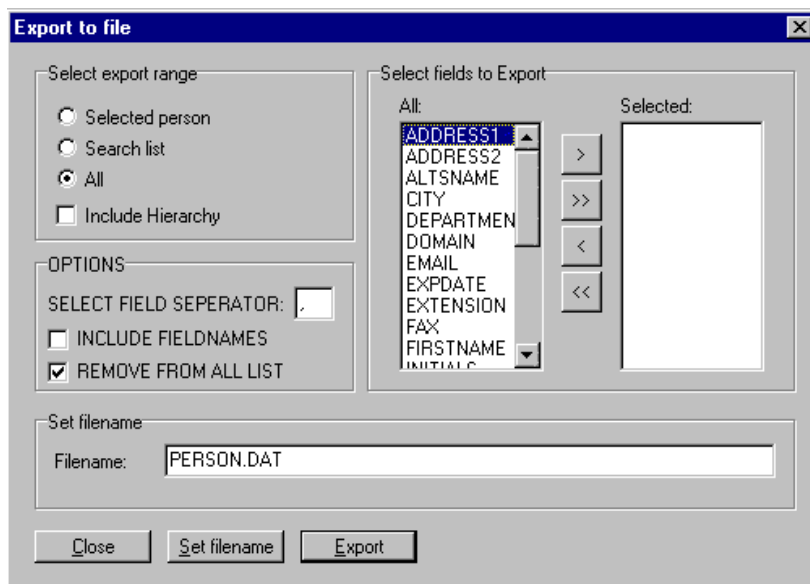
## Deleting multiple entries

Deleting multiple entries can be used if the entries have a common denominator, e.g., the same department name, or you put them together by using a 'Group'. To delete an entry/entries, perform either a speed or general search. When all records are listed click on Person then click on Delete selected. If multiple entries need to be deleted, highlight them by using shift-click method. Click the Person menu, then highlight Delete Selected. Click Yes to confirm the deletions or No to cancel.

### **N.B.: THERE IS NO UNDO OPTION FOR DELETING**

## Exporting the Directory

To export the directory, open the Person Module and click on File menu. Choose Copy to File. The following appears:



Select the fields you want to export from the column marked ALL by highlighting the field name and clicking on the right arrow  
Select the Set Filename button.  
Enter the filename.  
Select OK  
Select the Export button.

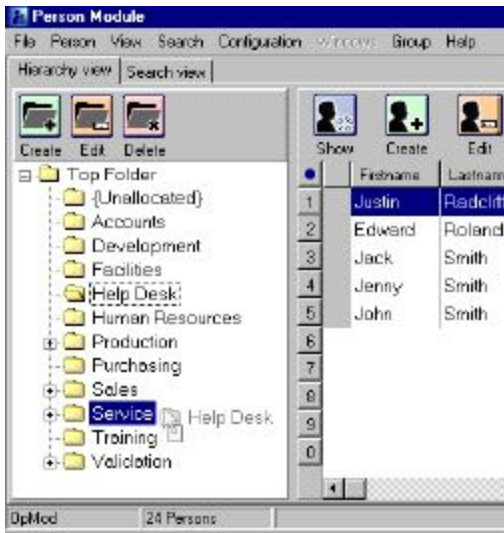


## Groups

Temporary groups can be created in the directory. These can be used for editing/deleting multiple entries that do **not** have a field in common, or creating Group Absences, e.g., people attending a sales meeting, board meeting, etc. (see Creating Absences).

### To create a Group

Open the Group menu.



Choose Create Group, and name it. An extra tab appears alongside the Search View tab,

Search for the records you want to put into the Group. Enter them into the Group by highlighting the entry, then 'clicking, dragging & dropping' it onto the tab. You will see a confirmation window, advising that the entry has been inserted into the group.

When a Group is displayed three extra tools are added to the normal Toolbar.



The Delete button will delete the selected person from the Group.

The Delete All button will delete all entries from the Group.

The Absence button will create an Absence for all selected people in the Group.

Note-. Groups are only temporary, and will disappear if the Person Module is closed. However, they can be re-created. Any Group absences created will be saved, and will not be deleted.

## Absence Module

### Creating an Absence registration



Click on. (or press shift key +F11). The following appears:-

A screenshot of a 'Registration' dialog box. It has a title bar with 'Registration' and window control buttons. The form contains: 'Name' (a dropdown menu), 'Extension' (a text field), 'Reason' (a dropdown menu), 'Recurrent' (unchecked checkbox), 'Expires' (checked checkbox), 'Start' section with 'Time' (15:30) and 'Date' (18/06) fields, 'End' section with 'Time' (17:30) and 'Date' (18/06) fields, a 'Comment' text area, and 'OK' and 'Cancel' buttons at the bottom.

Select the arrow at the end of the name window, or type in the first few characters of the surname & hit the Enter key. The speed search window appears.

Search for the required record and press Enter key to insert record details into the registration.

Insert a reason from list provided. Enter time (24 hour clock) and dates required.  
Enter any special messages or notes into the comments field.  
If you remove the tick from the 'Expires' box, the registration will have no end date or time.

(An alternative & faster way to create an absence, is to search for the person's record, then press shift F11; the name & extn. details are automatically filled in on the absence form.)

If you tick 'Recurrent' the registration can be set to appear daily, weekly or periodically.

The screenshot shows a 'Registration' dialog box with the following fields and options:

- Name:** Andrew Barton
- Extension:** 6015
- Reason:** (empty)
- Recurrent**
- Expires**
- Time:** Start: 16:25, End: 18:25
- Date:** Start: 22/06, End: 22/06
- Every:** 1 week(s)
- Monday,  Tuesday,  Wednesday,  Thursday,  Friday,  Saturday,  Sunday
- Comment:** (empty text area)
- Buttons:** OK, Cancel

Complete the form and click on OK.

### Editing an Absence Registration

Open the Absence Module and search for the required registration, by using the Search menu. Highlight the required absence (if using list view) or click onto the absence if using calendar view. Then click the Registration menu, or right click the mouse button to show a shortcut menu (Show/Edit/Delete). Choose Edit and make the necessary changes. Click on OK to save.

### Deleting an Absence Registration

Open the Absence Module and search for the required registration.  
Highlight the registration.  
Select delete.  
Select OK to save.

### Group Absence

Create a Group.  
Drag the entries into the group.  
Highlight the entries that are to be in the absence group.

Select the Create Group Absence button.  
Complete the form as required.  
Select OK to save.



### Topic Module

#### Using Topic Pages

To perform a Topic search, press F11 on the keyboard, or click the Topic button on the toolbar.

Type in the required search criteria (a minimum of three characters is required) and press return.

A list of matches will appear on screen. Select the page you want to view and press enter.

If you want to extend the call to a telephone number on the page (these appear in blue) tab to the number and press enter or click on the number with the mouse.

To exit out of Topic use ALT+TAB keys to hide the window behind the switchboard screen, or return to Switchboard window by clicking it on the Taskbar at the bottom of the screen.

#### Creating a Topic Page

Topic pages are created in Netscape Composer.

To create a topic page using Netscape Composer, click on the following:

Start/Programs//Netscape 7.1/Composer

Type the topic text as required.

Select File, then Save (you will be prompted for the Title)

Topic documents must be saved in the Topic Docs folder, which is normally located in:-

MY NETWORK PLACES

CONSTDXX (where xx is a no., e.g. 01, 20, etc.)

TOPICDOCS (may say documents)

### To Create a Telephone Field

Telephone fields can either be internal or external numbers. A number may also be hidden under text and the call extended from it.

Highlight the number, then click the HYPERLINK ICON button on the toolbar, or press CONTROL+ L. Type in TRANSFERTO:908704424421 in the box selected. Press return, or click OK. The number will appear on screen in blue to signify a telephone field.

### To Edit an Existing Topic

To make any changes to an existing page, open Netscape Composer, open the document to be edited, make the necessary changes and save it.

Pages can be linked if required, by using the hyperlink options.

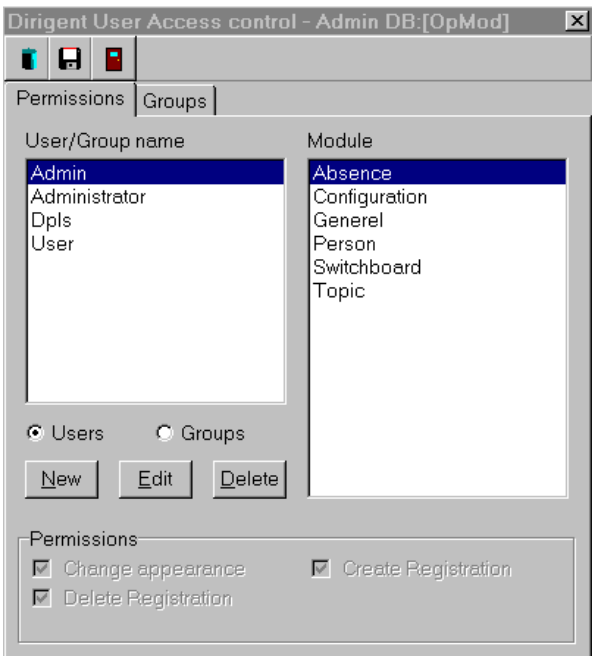
### Deleting Topic Pages

This can be done by using Windows Explorer, or by going into the TopicDocs folder, selecting & deleting the document.

## User Management

To add or edit access levels to Operator Module, open User Management. Select Start/Programs/Datapulse/Operator Module/User Management.

The following appears:



Note. Access to User Management is only permitted using the Admin user id.

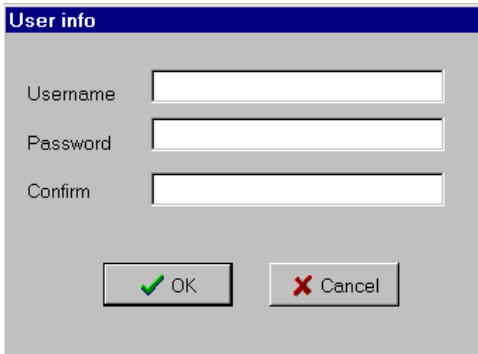
Groups are used to create various levels of access with variable permissions. Once a user Id has been created, it then has to be assigned to a Group. Permissions (when the Users option is selected) creates or edits existing User Id's. If the Groups option is selected, it will allow you to create or edit Groups.

## Add a New User

Select the Permissions tab.

Select the New button.

The following appears:



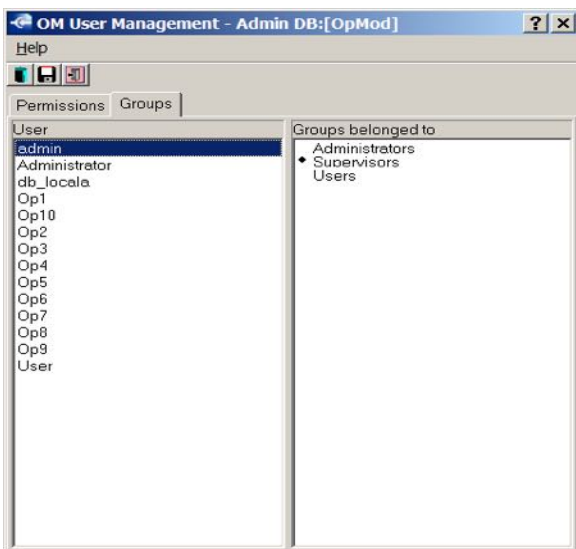
A dialog box titled "User info" with a blue header bar. It contains three text input fields labeled "Username", "Password", and "Confirm". Below the fields are two buttons: "OK" with a green checkmark icon and "Cancel" with a red X icon.



Type in Username, Password and confirm Password.

Select Ok.

Select the Groups tab.

The following appears:



Select the User name on the left-hand side, then click on the Group name you want the user to belong to. Click on Save Settings  from User Access Control tool bar. Click on exit  from User Access control tool bar.

## Changing User Id's and Passwords

Select the Permissions tab, select Users. Select the User Id to be changed, then edit and

make necessary changes. Select OK.



## The PSA Module (Person Specific Announcement)

When using the PSA module, all the operators must have their own user ID to log on with. This will ensure that the correct greeting is played for the operator that is currently logged on. To set up User ID's see the User Management section of these course notes.

### Setting up the Profiles

Before you can begin recording the announcements, you must set up what is known as the profiles. Profiles provide you with a list of the ICI (Incoming Call Indicator) keys, so you are able to program a different greeting per ICI key if required. You are also able to set it by time of day, e.g.:-

Midnight to 11:59 am the greeting may be Good Morning Datapulse

12:00 to 17:00 the greeting may be Good Afternoon Datapulse

18:00 to Midnight it may be Good Evening Datapulse

To program the profiles click on Options from the switchboard window, then select Configure.

Select the PSA tab.

Select the New button.

The screenshot shows a software window titled "PSA Profiles". It features a "Description" text field at the top. Below it is a list box for "ICI" containing four entries: "ICI00 External Call", "ICI01 External Call", "ICI02 External Call", and "ICI03 External Call". To the right of the list are "Add" and "Delete" buttons. Below the list is a "Number prefix" text field. At the bottom of the window, there are "From" and "To" time selection fields, with "00:00" and "23:59" entered respectively. "OK" and "Cancel" buttons are located at the bottom left and right of the dialog.

Type in a description of the required greeting, e.g. Good Morning Datapulse CTI, and then select the correct ICI key(s) this greeting is to be played for. Set the start and end times for this greeting, then click on OK. Repeat this process until all profiles have been set. If you want the operator to hear the greeting when answering an incoming call, tick the box labelled 'Monitor'.

## To record the PSA greetings

All operators (when set up as a PSA user) have permission to record their own PSA greetings.

Press Answer to select a line first.  
Click on service from the switchboard drop down menu.  
Click on PSA  
Click on greeting to be recorded  
Click on record

When ready to speak, click on record button and speak immediately.  
When finished, click on stop button.  
Click on play button to playback the recording.  
Select the OK button.

Continue this process until recordings have been completed.

## Trouble Shooting

Cannot Dial Out	Check Number lock is on. Check Number is in the Numbering Plan Check current window is active (Blue bar) Have you pressed dial now key (#)?
No Queue Meter	Check the tick list under Switchboard/Options menu
Calls Answered Automatically	Check the tick list under Switchboard/Options menu
Cannot Search (Disconnected in red on Switchboard window)	Check Operator Module logged on
Absence Not Showing	Check Absence tick box in Switchboard Option menu (Configure, General). Check Person Module, Configuration (General and then General tab)