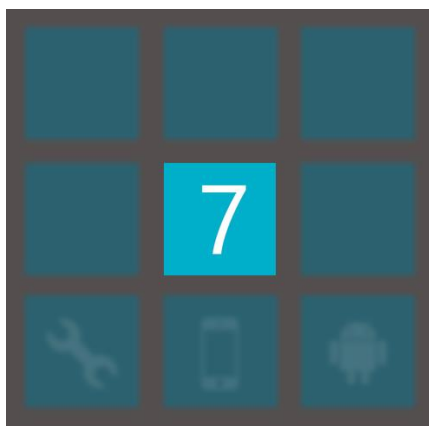# XELION 7 - QUICK START

Quick start document for end users of the

Xelion 7 softphone

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# 1. Download and install Xelion 7

## 1.1 Download the Xelion softphone

Xelion 7 requires the latest version of Java, you can download this for free from from java.com or ask your I.T. administrator for asistance. You can download the softphone from your Xelion server, if you do not know the address for this please speak to your Xelion service provider. Once on the page click on the 7 to download the softphone and Accept any security requests.

1.2 First time login

Once installed the login screen will open. Log in with the information you received from your Xelion service provider and click on Login. A Xelion icon is automatically placed on your desktop.
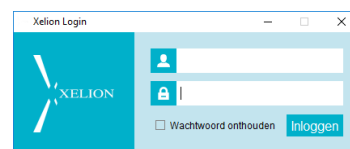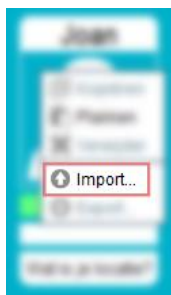

1.3 Xelion softphone overview
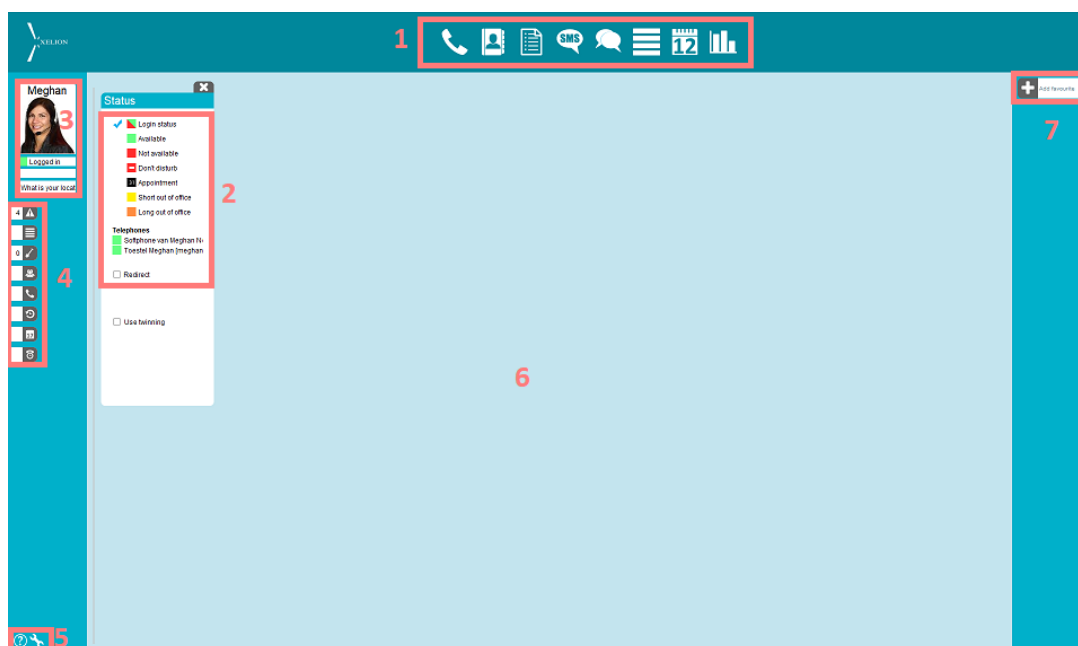
1. Start bar
2. Status overview
3. Name, photo, status message & location
4. Information Overview

5. Help & settings
6. Dashboard
7. Favourites

1.4 Upload a picture

You can upload a picture to Xelion 7 that is visable in the presence, favorites, address book and call screen for your colleagues to see.

To upload your picture, right click on the avatar under your name and choose import, navigate to your picture on your computer and select it. You can crop and adjust your picture, click OK when you are ready to upload it.

1.5 Setting your status

To change your status click with the left mouse button on your photo, or select it from the status overview in the dashboard.

Name	Receive Calls	Chat / SMS
Login status	✔	✔
Available	✔	✔
Not available	✘	✔
Do not disturb	✘	✘
Appointment	✔	✔
Absent for a short time	✔	✔
Long absent	✔	✔

If you want your status to automaticaly change when you log in and out of the softphone, choose Login Status.

1.6 Setting devices to do not disturb

In the status screen, you can see which of yoru devices are set to available or DND. Click in the green (or red) box to stop a device from ringing when you receive a direct call.

1.7 Twin your softphone with a hardphone
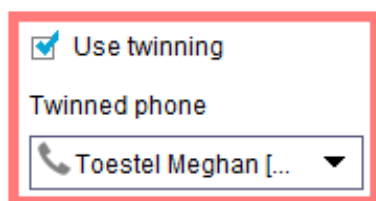
You can twin the softphone with a hardphone using "use twinning" in the status overview. Select the hardphone you want to twin with. If you cannot see "use twinning" in the status overview please contact your Xelion administrator.

1.8 Connecting a USB headset with Xelion

Xelion 7 supports Jabra headsets. Connect your Jabra dongle to your PC, switch on your headset and restart your softphone. Xelion will automatically connect to your headset. You can adjust your headset and audio options by clicking the settings icon and going in to the PC Audio menu.

Xelion 7 can work with other brands of headsets but not all features may be available or supported.

1.9 Setting Favorites

The favourites menu on the right side of the softphone allows quick visability and access to people you speak to often. Before adding a favourite they must be in the address book. To add a favourite contact click on "add favourite" and enter the name of the person, click on them to add them.
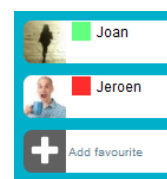
2. Using the softphone

This is a simple overview of how to use the softphone, for a more detailed guide please request the end user extended manual from your Xelion service provider.

2.1 Navigating with the start bar

At the top of the softphone you will see the startbar.

Icon	Description
📞	Making an outgoing phone call
📇	Find or add contact in the address book
📄	View and work with lists
SMS	Send an SMS
💬	Send a chat (IM)
☰	View communication with contacts
3	View your Xelion calendar

2.2 Making a call

Click on the telephone icon in the start bar and enter the number you wish to dial click OK. You can also dial by name, type the name of the person you wish to call, click on their icon and then the number you wish to dial.

2.3 Receiving calls on the softphone

When you receive a call on your softphone a pop up window will appear. You can reject or answer the call. The icons and fields have the following meaning when on an active call.

Name or number of contact person

Minimize or close.

Keypad

Call ID and duration of call.

Mute

Volume control

Hang up

Hold / Resume

Transfer

Conf Call
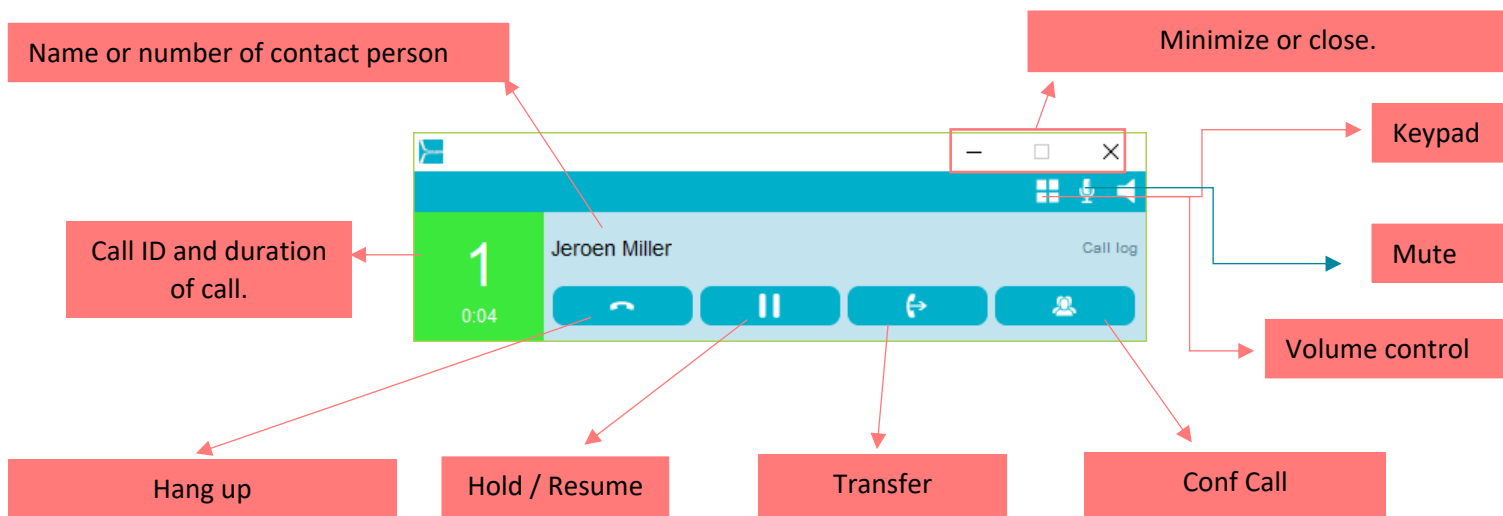
2.4 Place call on hold

To put a call on hold, click the "Hold" button (see above) during the call. The call ID and duration window will turn red. To take the call off the hold, click the "Hold" button again.

2.5 Warm Transfer

To warm transfer a call click the transfer button, make a choice between "colleague list" or "another" and enter the desired number or name. After that call is established, click on transfer again and merge both calls.

2.6 Blind transfer

To blind transfer a call, open the presence list during the active call, right click on the phone number of the desired person and select blind transfer. Please note that this option must be activated by your Xelion administrator.

2.7 Setting up a conference call

To setup a conference call dial the 1st participant, when you are ready to add an additional person click on the conference button (see image above) and call the second person, when you aready to bridge the calls click conference again and merge the calls.

2.8 Listening to a colleague

If you have the rights to listen to a colleague, click on the desired conversation in the call window and click on "listen in" in the blow-up that opens. The person you are listening to will receive a notification that they are being listened to.


2.9 Chat
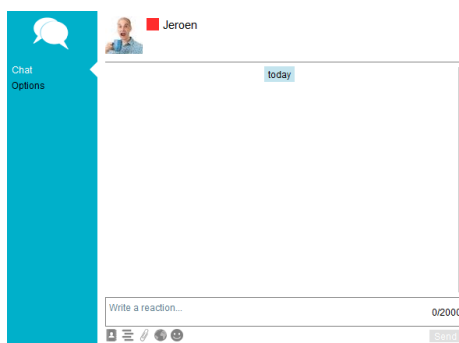
To chat with a colleague click on the chat icon in the start bar. Select the contact you want to chat with and the chat box will open in the dashboard of the softphone. The icons at the bottom of the screen allow you to easily send contacts, communications, attachments or smileys.

2.10 Calendar

In the start bar, click on the calendar icon and choose the desired calendar. On the left hand side you can choose the desired date or period. You can also view multiple calendars by clicking add calendar.
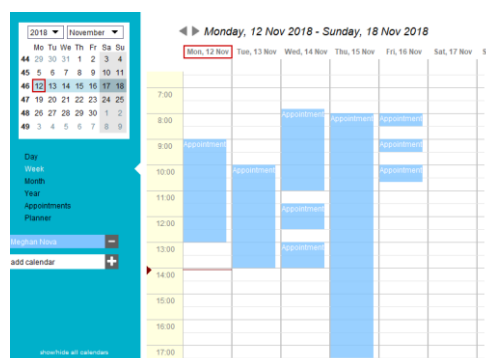
2.11 Information bar (missed calls, chats etc)
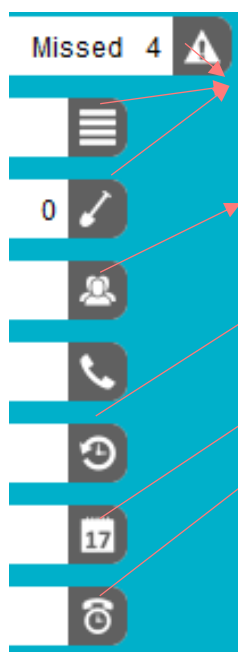
On the left side of the softphone you will find the information bar. The information bar displays the number of missed phone calls, messages or the number of flagged item. Click on the appropriate line to open the screen.

Presence allows you to view your colleagues and contact them from a single menu.

Through calls you can open the call window and view wallboards. Visability of Wallboards may require permissions to be set by your Xelion administrator.

Through synchronization you can view the status and set synchronization.

Calendar shows the calendar overview.

2.12 Communication overview
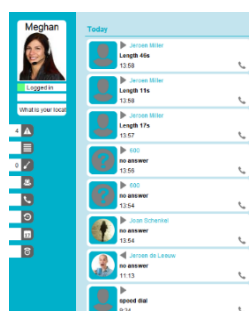
By opening the communication overview via the information bar you can see your recent calls and messages. You can add contacts to the address book, listen to call recordings and click on a call to see more information.

You can add contacts to the address book by hovering over a number to open up the add to contacts option, type the contacts name and follow the menu to create an address book entry.

2.13 Logging out of the softphone

To log out of the softphone right click the Xelion icon in the notifications area lower right corner of windows and click Exit Xelion Phone System.