

Shentel

**Hosted Voice Administrator
Guide**

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metaswitch

Notices

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1 Introduction

1.1 Purpose of this guide

Welcome to your new phone system!

This guide is intended to help Administrators of a Metaswitch Networks Hosted PBX phone system perform the various tasks needed to administer the system, such as

- Adding new lines to the system
- Setting up your call groups
- Configuring your automated receptionist.

It is split into sections which describe how to configure a different aspect of your phone system.

There is a glossary at the end of this guide which explains the important concepts your phone system uses.

1.2 Other guides

There are other guides that you may need to refer to when administering your phone system, and you will need to provide to the users of your phone system. These are:

- Metaswitch Networks Hosted PBX *End User Quick References*. These are two page quick reference cards which describe the basic features of your new phones. You should distribute these Quick References to all of your end users.
- Metaswitch Networks Hosted PBX *End User Guide*. This guide describes in more detail how end users should use all of the functions and features of your phone system. You should distribute copies of this document to all of your end users.

2 CommPortal Business Group Administrator (BG Admin)

CommPortal provides a web interface to your phone system, and allows end users and Business Administrators to modify their settings. There are two CommPortal interfaces.

- The first is for regular users to manage their business telephony settings.
- The second is for Business Group Administrators to modify both global settings for the business and to modify end-users' settings.

The second of these interfaces is the one which you will use to administer the phone system and is described by this document.

2.1 Accessing the CommPortal BG Admin interface

To configure BG lines, and to manage their BG's lines and services, a BG Administrator should log in to the CommPortal BG Admin interface using a separate login page to regular users. For example, if BG Line Users log in at `http://voicemail.um.shentel.net`, a BG Administrator might log in at `http://voicemail.um.shentel.net/bg`. The BG Administrator login page sends the BG Administrator to the BG Administrator section of the default web UI.

CommPortal is supported on the latest versions of all major browsers and operating systems.

Logging into CommPortal BG Admin

The following shows a sample CommPortal login page.

Figure 1: CommPortal login page

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To log into CommPortal, follow these steps:

1. Enter a phone number with administrative access.
2. Enter the password.
3. Click on *Login*.

2.2 Using CommPortal BG Admin

Once you are logged into CommPortal you will see the Business Group Administrator's homepage.

Figure 2: CommPortal Business Group Administrator homepage



- Down the left hand side of this page are a series of links which take you to the different pages within CommPortal.
 - Depending on the configuration of your system, *you may not have access to all the services shown on this screenshot*. You will only see links to features and services that you can view and manage.
- The main panel shows the same information as the left hand sidebar but as a series of clickable icons.
- The name of the user you are logged in as is shown at the top of the page. Use the drop-down to reveal a **Logout** link.
- At the bottom of the left-hand sidebar, you can follow links to
 - access **Help** for the screen you are viewing

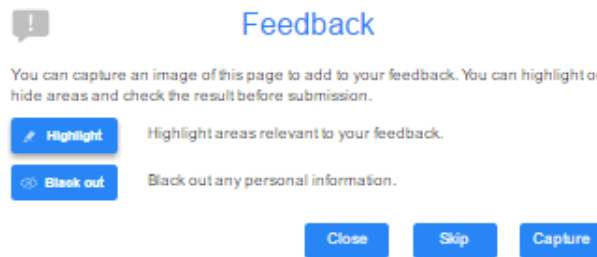
- **Send Feedback**, as described below.

2.2.1 Send Feedback

If you encounter a problem when using the CommPortal BG Admin interface, or have a suggestion for an improvement, you can click on the **Send Feedback** link and submit a report to Metaswitch Networks.

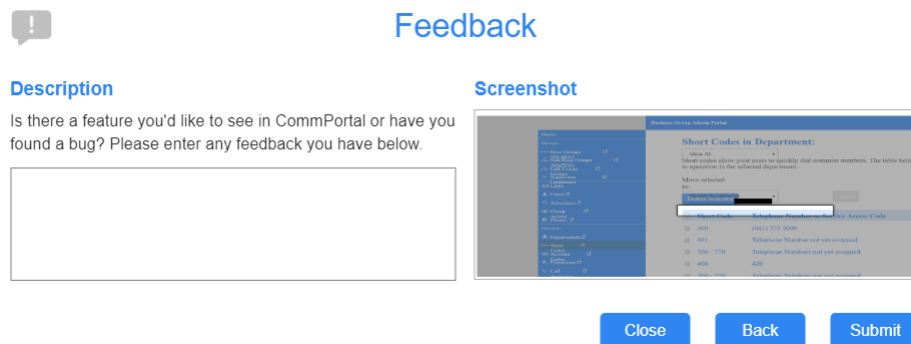
Clicking on the **Send Feedback** link launches a pop-up.

Figure 3: Send Feedback first pop-up



- If you want to include a screenshot of the BG interface:
 - Highlight particular areas of the screen by selecting **Highlight**, positioning the cross-hatch and then dragging – the area that will be included in the screenshot will be highlighted.
 - Use the **Black out** option to disguise any personal information
 - Click **Capture**.
- If you do not want to include a screenshot, click **Skip**.
- This launches a second screen, with the screenshot on the right (if you have taken one) and a box where you can add a description of the problem you have encountered or enhancement you would like to see.

Figure 4: Send Feedback second pop-up

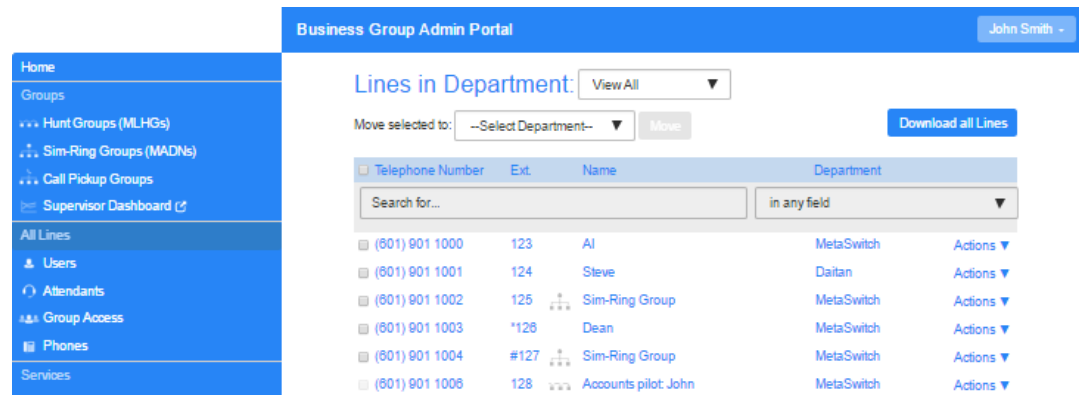


- Click **Submit** to send your feedback.

3 Managing lines with BG Admin

To manage the lines in your Department, click on the **All Lines** option on the left-hand sidebar.

Figure 5: CommPortal Business Group Admin Lines display



This menu shows all the lines within the department(s) of which you are an administrator.

3.1 Working with your Business Group Lines

If you manage multiple departments or have any sub-departments in your department, you can select the department or sub-department using a drop-down list at the top of the page. This drop-down also includes a search box, which may be useful if you have a large number of departments in your Business Group. As you type a term in the search box, you will possible matches and you can then select the Department you want.

When **View All** is selected, the screen includes a Department column so that you can see where a particular line is located.

The **Download all Lines** button on the top right of the screen enables you to download a .csv file giving the name, DN and department of each line, ordered by the department to which the lines belong if you have more than one department.

The **Actions** drop-down on the far right of each line has some or all of the following options, depending on the type of line. Each option opens a pop-up where you can view or carry out configuration.

- view individual settings or view line settings to view configuration for the selected line
- view group settings for this line (if the Line is a member of a Group, for example a Hunt Group)
- edit personal details, for example renaming the line
- add services to the line

- reset the line, as described in 3.1.1
- unlock the account.

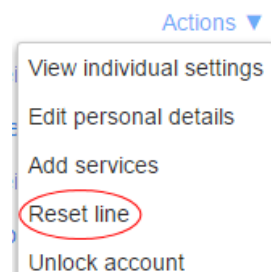
3.1.1 Resetting a Business Group Line

You can use a reset line option on a Business Group line if you need to allocate this line to a different subscriber. Resetting the line removes all the current data associated with the line, including any call lists.

To reset the line:

- Expand the **Actions** drop-down alongside the line.
- Select *Reset line*.

Figure 6: Actions drop-down



- This will launch a pop-up where you should
 - enter the name of the new subscriber
 - choose whether to use the account name as the local calling name (this is ticked by default)
 - choose whether to remove the line from all the groups which the previous subscriber belonged to (this is ticked by default).
- Click **Apply**.
- You will then see a confirmation pop-up warning you that resetting the line will lose all the data for the line and cannot be undone.
- Click **Confirm** to reset the line, or **Cancel** to leave the line unchanged.
- If you click **Confirm**, you will then see a New User Details pop-up showing the new account name, directory number and all the PINs/passwords, which will have been set to randomly generated numeric or alphanumeric sequences.
- You can copy and paste this information into an email to send to the new line user.

- The new MetaSphere EAS account created for this new subscriber will not yet be initialized and the subscriber will be prompted to set a new TUI PIN/CommPortal password and record an initial greeting the first time they log in.

3.1.2 Moving lines between departments

To move lines between departments, follow these steps:

1. Select the line using the checkbox to the left of the line
2. Select the department you wish to move the line to using the drop-down list at the top of the page.
3. Click on the *Move* button.

3.1.3 Logging into a user's account

To log on as a regular user, follow these steps:

1. Expand the **Actions** drop-down to the right of the line, and select *View individual settings*.
2. This will launch the regular CommPortal interface for that line in a new browser window.

3.2 Departments

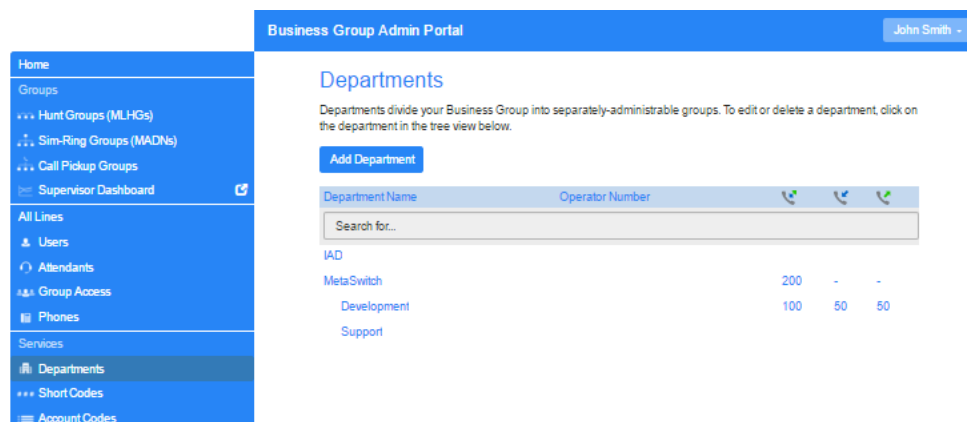
Your Business Group may have a number of departments. You may be able to use the following options in the CommPortal Business Group Admin interface to view and manage your departments. The *Departments* link is only visible to root BG Admins.

3.2.1 Managing Departments

You will see the following screen when you click on the *Departments* link in the menu on the left of any page in the CommPortal BG Admin interface.

This displays all the departments in your Business Group, along with any configured restrictions on the number of incoming, outgoing or incoming/outgoing calls.

Figure 7: Departments page



If you have a very large number of departments, you can use the *Search for* box to find a department. As you type, matching departments are shown, with the matching text highlighted in yellow.

3.2.2 Adding Departments

The BG Admin may be able to create departments within the business group. Each Business Group can have up to 1,000 departments or, if it is configured as a Business Group that supports more than 10,000 lines up to 4,000 departments.

To create a department within a business group follow these steps:

Figure 8: Add Department dialog box

To add a new department, enter its name, select its parent department and then click **Add**.

Department Name:

Parent Department:

Operator Number:

Set limits on the number of calls this department can make:

Incoming and Outgoing: calls

Incoming: calls

Outgoing: calls

Add **Cancel**

1. From the BG Admin Page select the *Departments* link on the left of the page. Click the *Add Department* button at the top of the page and the dialog shown above will appear.
2. Enter the following information.
 - Department Name
 - Parent Directory – If this is a top level department, you will use the Business Group Name. If this is a sub department, this will be the upper level department

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- Operator Number – Enter the number of the line that will act as operator for this department
- If you plan to limit the number of calls allowed for this department, enter the following information
 1. Incoming & Outgoing – Enter the total number of combined concurrent calls that this department will be permitted to have active at any given time.
 2. Incoming – Enter the total number of concurrent incoming calls that this department will be permitted to have active at any given time.
 3. Outgoing – Enter the number of concurrent outgoing calls that this department will be permitted to have active at any given time.

NOTE: To allow any mix of incoming & outgoing enter the same value in all three fields, or set both the Incoming and the Outgoing fields to Unlimited.

Some example departments are shown in 3.2.1.

4 Managing phones with BG Admin

To access the Phones page select the *Phones* link on the left hand side of the page.

Figure 9: CommPortal Business Group Admin Phones display

Business Group Admin Portal John Smith

Phones in Department: View All

--Select Department-- Assign to Department

Enter number... Assign to Line

Assign phones to lines using the table below or manage your phone profiles.

Model	MAC Address	Description	Assigned to	Department	
Search for...				in any field	
[Icon]	00:11:22:33:44:56	SMC's desk	(501) 901 1112	None	Actions ▼
[Icon]	00:11:22:33:44:57	MGB's desk	(501) 901 1113	None	Actions ▼
[Icon]	00:11:22:33:44:90	testphone	(501) 901 1113	Support	Actions ▼
[Icon]	00:11:22:33:44:91	testphone1	(501) 901 1113	MetaSwitch	Actions ▼
[Icon]	00:11:22:33:44:92	testphone2	(501) 901 1113	MetaSwitch	Actions ▼
[Icon]	00:11:22:33:44:93	testphone3	(501) 901 1113	Support	Actions ▼
[Icon]	00:11:22:33:44:94	testphone4	(501) 901 1113	MetaSwitch	Actions ▼
[Icon]	00:11:22:33:44:95	testphone5	(501) 901 1113	MetaSwitch	Actions ▼
[Icon]	00:11:22:33:44:96	testphone6	(501) 901 1113	IAD	Change phone Configure phone
[Icon]	00:11:22:33:44:97	testphone7	(501) 901 1113	IAD	Actions ▼
[Icon]	00:11:22:33:44:98	testphone8	(501) 901 1113	IAD	Actions ▼
[Icon]	00:11:22:33:44:99	testphone9	(501) 901 1113	IAD	Actions ▼
[Icon]	00:11:22:33:45:00	testphone10	(501) 901 1113	IAD	Actions ▼
[Icon]	00:11:22:33:45:01	testphone11	(501) 901 1113	MetaSwitch	Actions ▼
[Icon]	00:11:22:33:44:58	None		None	

This page shows you all of the known phones in the current department. To view the phones in sub-departments, select a different department using the drop-down list at the top of the page.

The **Actions** drop-down alongside each phone allows you to

- **Change phone** – make changes to an individual phone, for example to modify its description or allocate it to a line.

4.1 Phone profiles – Endpoint Pack phones

This section describes how to work with phone profiles for SIP phones provisioned using an Endpoint Pack, which is the recommended way of deploying these devices.

This section describes how to use the Phone Profile Editor (also called the CommPortal Phone Configurator) to work with Endpoint Pack phone profiles.

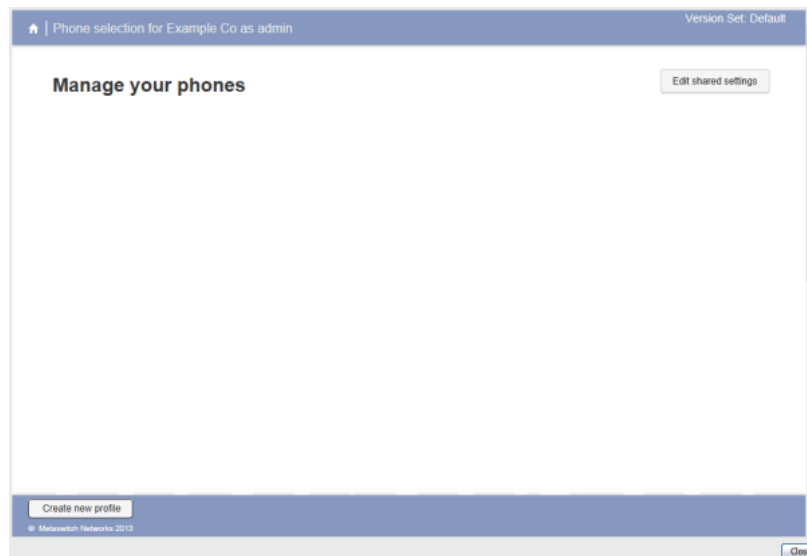
If you only have Endpoint Pack phone profiles, you do not need Adobe Flash. However, if you have any Built-In phone profiles, you must have Adobe Flash version 9.0 or greater.

4.1.1 Managing phone profiles

To manage the Endpoint Pack phone profiles for the department you are an administrator for, follow these steps:

1. Click the *manage your phone profiles* link towards the top of the CommPortal Phones page.
2. This launches a new window with the Phone Profile Editor (also called the CommPortal Phone Configurator).

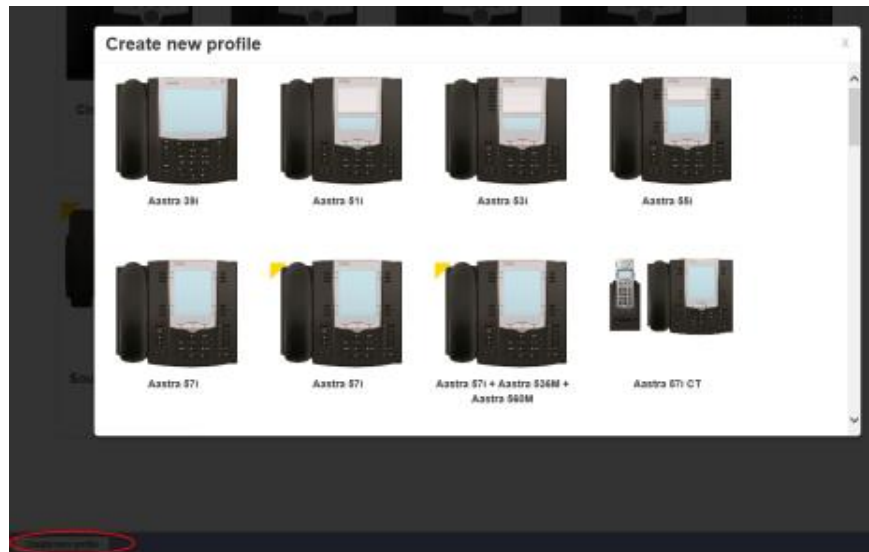
Figure 10: Default Phone Profile Editor



4.1.2 Adding a new phone profile

By default a department does not contain any phone profiles. To add a new phone profile, follow these steps:

Figure 11: Create New Profile dialog box

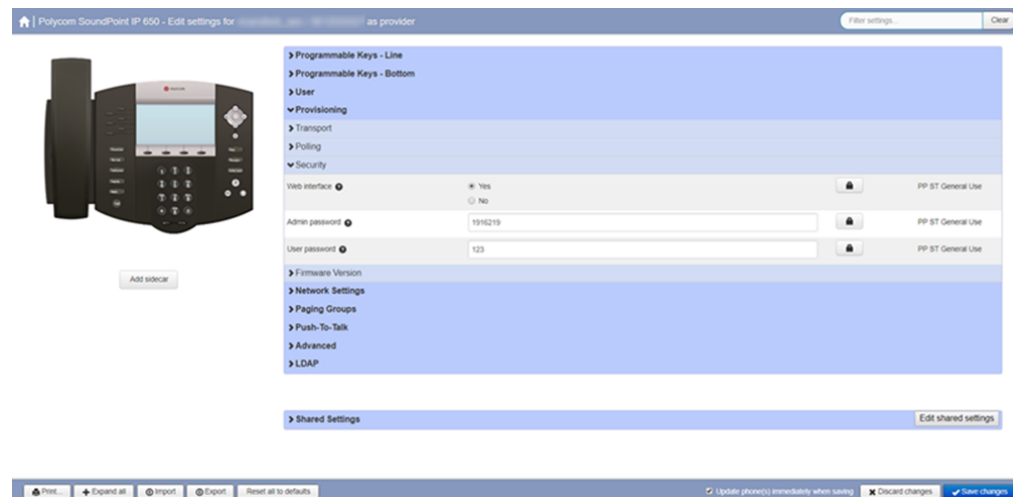


1. Click on the *Create new profile* button at the bottom left of the screen to launch the Create new profile screen which displays pictures of the handsets of all the available phone models.
2. Select the model of phone you want to create a profile for.
3. Click on *OK*.
4. A default profile for the phone will now appear in the Phone Profile Editor.
5. Phone profiles with a yellow triangle in the top left corner are provisioned using the Built-In method and you should refer to section 4.1 for information on viewing and editing these profiles.

4.1.3 Modifying a phone profile

To open the phone profile that you want to modify, either click on the picture of the phone or select *Edit* from the drop-down underneath the picture.

Figure 12: Modifying a phone profile



1. On this screen, you can click on the arrows alongside the headings to expand the individual settings so that you can make changes to them.
2. For each setting, use the drop-down to select a new value.
3. Click the padlock icon if you want to lock or hide this setting so that a subscriber cannot change it.
4. The column on the far right indicates when the default value is set in the phone profile. You can use the *Reset all to defaults* button at the bottom of the screen if you want this profile to use the default values.
5. Settings that you cannot change will be grayed out.
6. For some phone models, some settings may be grouped together into 'hotspots'.
 - If you hover your mouse over the handset image and a hotspot appears, you can click on this so that only the settings that relate to the keys in this hotspot appear on the right-hand side.
 - Click on any other area of the phone image to restore the full list of settings.
7. Some settings are shared between Phone Profiles and are displayed in a Shared Settings panel.
 - Click *Edit shared settings* to view and, if you have permission, modify these settings. For example, you may want to enable or disable the use of XML applications for this phone.
8. You can use the **Import** and **Export** buttons at the bottom of the screen to export phone settings from one Endpoint Pack phone profile to a file and then import the settings from that file into another phone profile.

- Clicking the **Export** button writes the phone profile data at the current scope in the phone profile hierarchy to a text file in XML format that can be downloaded to the user's PC. This file will include all settings that have been explicitly configured at the scope being exported, but does not contain the first/primary line configuration to avoid you configuring multiple SIP phones to all register with the same SIP line when the file is imported to another phone profile.
- Clicking the **Import** button launches a File Open dialog, where you can select a previously exported data file. The settings are then imported into the currently selected phone profile.

The CommPortal Phone Configurator validates the import file and, if any settings have been changed from the defaults, asks you whether to keep or reset current settings. It then runs the import and applies the settings, modifying the UI to display the new values. It displays warning messages if any settings cannot be applied.

- Once all the settings have been imported, you can review the changes before saving them. Valid changes that have been imported are shown in blue. Any invalid changes are shown in red.

9. To save your changes permanently:

- If your system supports the feature, you will see an **Update phone(s) immediately when saving** option on the bottom of the UI. Tick this option if you want the changes to be sent to the phone immediately when you select *Save changes*, rather than waiting for it to be rebooted.
- Click on *Save changes*. Unless you have ticked **Update phone(s) immediately when saving**, changes won't be applied to the phones themselves until they are next rebooted.

10. To abandon any changes you have made in this session, or since you last saved, click on *Discard Changes*.

4.1.4 Logging out of the Phone Profile Editor

Close your browser window to log out of the Phone Profile Editor.

5 Managing Sim-Ring Groups (Multiple Appearance Directory Numbers (MADNs))

From V7.4 onwards, MLHGs are enhanced to provide the same function as MADNs by providing a ring all distribution algorithm. MADNs will continue to work as in previous versions. However, for new configuration, you should use MLHGs instead. For more information on MLHGs, see section 6.

5.1 Viewing Sim-Ring Groups (MADNs)

The Sim-Ring Groups (MADNs) page displays all of the Sim-Ring Groups (MADNs) within your department.

Figure 13: CommPortal Business Group Admin Sim-Ring Groups (MADNs) Display

Business Group Admin Portal John Smith

Sim-Ring Groups in Department: Data Connection ▼

A Sim-Ring Group (MADN or Multiple Appearance Directory Number) is an external number that can be used to access multiple lines within a Business Group, so that all free lines associated with the Sim-Ring Group ring together when the number is dialed. Please contact us if you would like to set up a new Sim-Ring Group.

Move selected to: Support Move

Telephone Number	Extension	Number of Members	Actions
(501) 901 1002	656	5	Actions ▼
(501) 901 1003	657	1	Actions ▼
(501) 901 1004	658	3	View group settings View line settings
(501) 901 1005	660	1	

To view Sim-Ring Groups (MADNs) in sub-departments, select the sub-department from the drop-down list at the top of the page.

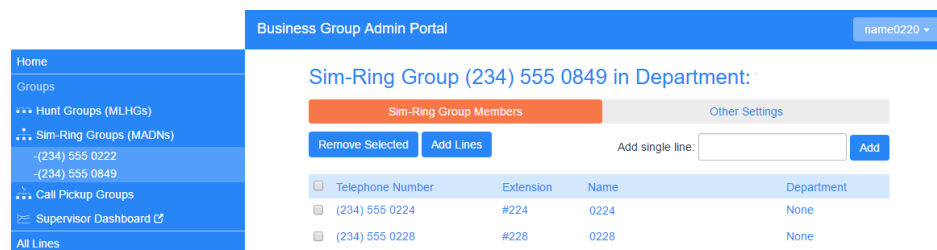
The **Actions** drop-down allows you to

- **View group settings**, where you can make changes to the membership of this Sim-Ring group and view the current call limit algorithms.
- **View line settings**, where you can view the CommPortal page for an individual line within the Sim-Ring group.

5.2 Viewing and modifying a Sim-Ring Group (MADN)

To view more details about a Sim-Ring Group (MADN) or change its settings, click anywhere on the Sim-Ring Group's entry or click **Actions**, then **View group settings**.

Figure 14: MADN groups display



5.2.1 Sim-Ring Group (MADN) Members

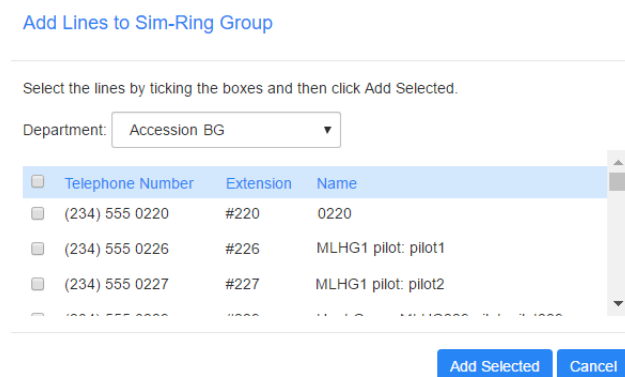
The **Sim-Ring Group (MADN) Members** tab displays all of the lines that will ring when the **Sim-Ring Group** is called.

Adding lines

To add lines to the **Sim-Ring Group**, perform one of the following two steps:

1. If you want to add a single line and know the number, enter it in the **Add single line** text box on the top right and click **Add**.
2. If you don't know the number, click on **Add Lines**. Use the checkboxes to the left of the lines to select one or more lines to add and click **Add Selected**.

Figure 15: Add Lines to MADN dialog box



Removing lines

To remove a line from the Sim-Ring Group, follow these steps:

1. Select the line to remove using the checkbox to the left of it.
2. Click on the **Remove Selected** button.

5.2.2 Other settings

The Other Settings tab shows you the Call Limit Algorithm in use for this Sim-Ring Group.

5.3 Changing Sim-Ring Group settings

To view and change the settings for the Sim-Ring Group line, follow these steps:

1. Click on the **Actions** drop-down to the right of the Sim-Ring Group number and select **View line settings**.
2. This will open a new browser window and automatically log you into CommPortal for this number. Follow the instructions for configuring settings given in the *Metaswitch Networks Hosted PBX End User Guide*.

6 Managing Hunt Groups (Multi Line Hunt Groups (MLHGs))

If you are using the Integrated ACD (Automated Call Distribution) feature, you should refer to the Integrated ACD *End User Guide* for more information on how to administer the MLHGs making up your Call Center. In Integrated ACD, MLHGs are referred to as Queues.

6.1 Viewing Hunt Groups

The Hunt Groups page displays all of the Hunt Groups in the Business Group or department(s) that you have permission to administer.

Figure 16: CommPortal Business Group Admin Hunt Groups (MLHGs) display

Business Group Admin Portal John Smith

Hunt Groups in Department: View All

A Hunt Group (MLHG or Multi-Line Hunt Group) is a set of lines within a Business Group (members), so that calls to the group are passed to a non-busy member of the Hunt Group, or may be added to a queue if all members are busy. Please contact us if you would like to set up a new Hunt Group.

Move selected to: --Select Department-- Move

Hunt Group Name	Number of Members	Service Level	Department
Accounts	6	Premium ACD	MetaSwitch
Marketing	2	Premium ACD	MetaSwitch
Sales	3	Basic ACD	MetaSwitch
Support	1	Hunt Group	MetaSwitch

Licenses remaining: Basic ACD 19 of 20, Premium ACD 13 of 15

To view Hunt Groups in sub-departments, select the sub-department from the drop-down list at the top of the page.

6.2 Moving MLHGs to another department

To move an MLHG between departments, follow these steps:

1. Select the MLHG using the checkbox to the left of the MLHG.
2. Select the department you wish to move the MLHG to using the drop-down list at the bottom of the page.
3. Click on the *Move* button.

6.3 Viewing and modifying Hunt Groups

To view the details of a Hunt Group and to modify its settings, select that MLHG by clicking anywhere on its entry on the Hunt Groups screen.

This takes you to a series of tabs for that MLHG.

6.3.1 Hunt Group pilots

The Hunt Groups Pilots tab displays any pilot numbers for this Hunt Group. A pilot number is one which when called, enters this Hunt Group.

Click anywhere on a Pilot Line entry to access the CommPortal interface for this line. This allows you to carry out any configuration on the Pilot line, for example you can enable or disable the Unavailable Call Forwarding service for this line and configure the forwarding number that would be used if all your lines were unavailable, for example because there was a power outage at your site.

6.3.2 Hunt Group Members

This tab displays all of the lines which are members of this Hunt Group. There is an icon for each line which tells you whether each member is currently logged into this Hunt Group. Your deployment may be configured so that Hunt Groups can contain lines that are external to your Business Group.

Figure 17: Hunt Group Lines tab

Business Group Admin Portal name0220

Hunt Group Accession in Department: 1

Hunt Group Pilots **Hunt Group Members** Settings

Remove Selected Change Positions Add Lines Add single line: Add

Position	Telephone Number	Extension	Name	Department	Actions
1	(234) 555 0222	#222	Sim-Ring Group	1	Actions ▼
2	(234) 555 0825		TEST 2	1	Actions ▼
3	(234) 555 0833		TEST 3	1	Actions ▼
4	(234) 555 0834		TEST 4	1	Actions ▼
5	(234) 555 0836		TEST 5	1	Actions ▼

Adding lines

To add lines to the Hunt Group, perform one of the following two steps:

1. If you know the number, enter it in the text box on the top right and click *Add*.
 - Note that if you want to add an external line to the Hunt Group, you must add it by specifying its full directory number in the text box. You cannot select from a list because this line is not a member of your Business Group.
 - You cannot add external lines to an MLHG that uses the Integrated ACD service.
2. If you don't know the number, click on *Add Lines*. To select one or more lines to add, use the checkboxes to the left of the lines and click *Add Selected*.

Figure 18: Add Lines to Hunt Group dialog box

Add Lines to Hunt Group

Select the lines by ticking the boxes and then click Add Selected. Lines added to this Hunt Group are allowed to login/logout. When you add a line, it will initially be logged out.

Department: Accession BG

<input type="checkbox"/>	Telephone Number	Extension	Name
<input type="checkbox"/>	(234) 555 0220	#220	0220
<input type="checkbox"/>	(234) 555 0224	#224	MLHGP
<input type="checkbox"/>	(234) 555 0226	#226	MLHG1 pilot: pilot1
<input type="checkbox"/>	(234) 555 0227	#227	MLHG1 pilot: pilot2

Add Selected Cancel

Removing lines

To remove a line from the Hunt Group, follow these steps:

1. Select the line to remove by using the checkbox to the left of it.
2. Click on the *Remove Selected* button.

Changing positions

To change the positions of lines within the Hunt Group, follow these steps:

1. Click on the *Change Positions* button.
2. Move lines up and down using the icons.
3. Click on *Apply*.

Figure 19: Change Line Positions in MLHG dialog box

Change Member Positions in Hunt Group

Use the up/down arrow icons in the Position column to change the order in which the hunt algorithm selects non-busy lines to pass incoming calls to. Click Apply when you have finished.

Position	Telephone Number	Extension		Name	Department
1	(234) 555 0222	#222	↕	Sim-Ring Group	1
2	(234) 555 0825		↕	TEST	1
3	(234) 555 0833		↕	TEST 3	1
4	(234) 555 0834		↕	TEST 4	None
5	(234) 555 0836		↕	TEST 5	None
6	(234) 555 0835		↕	TEST 6	None

Apply

Cancel

6.3.3 Settings

The Settings tab lets you view and change various settings for the Hunt Group.

Preferences

The Preferences page allows you to rename the MLHG. To rename the MLHG, follow these steps:

1. Type the new name in the text box.
2. Click on *Apply*.

Hunt settings

The Hunt Settings page allows you to see the call distribution algorithm that is currently in use for this MLHG and other detailed MLHG settings.

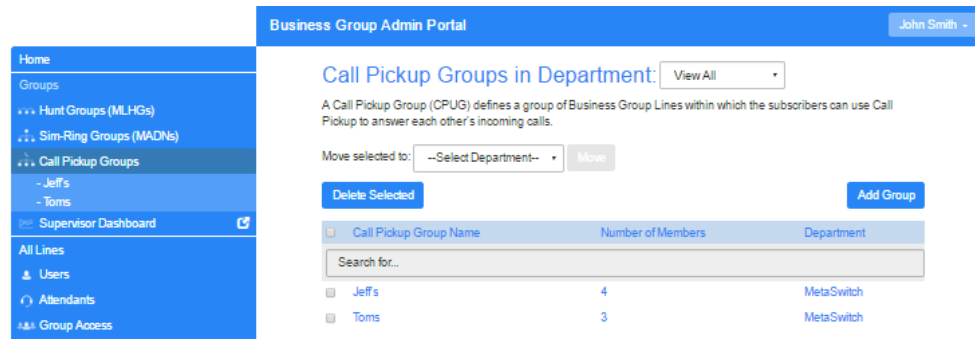
You can also use a setting on this page to determine whether the Pilot Line's information (DN and name) is delivered as the Caller ID.

7 Managing Call Pickup Groups

7.1 Viewing Call Pickup Groups

The Call Pickup Groups page displays all of the Call Pickup Groups in your department.

Figure 20: CommPortal Business Group Admin Call Pickup Groups display



To view Call Pickup Groups in sub-departments, select the sub-department from the drop-down list at the top of the page.

7.2 Moving Call Pickup Groups to another department

To move Call Pickup Groups between departments, follow these steps:

1. Select the Call Pickup Group using the checkbox to the left of the Call Pickup Group.
2. Select the department you wish to move the Call Pickup group to using the drop-down list at the top of the page.
3. Click on the *Move* button.

7.3 Adding Call Pickup Groups

To create a new Call Pickup Group, follow these steps:

1. Select the Department to which you want to add the Call Pickup Group.
2. Click on *Add Group*.
3. Enter the name of the new Call Pickup Group in the text box.
4. Click on *Add*.

Figure 21: Add Call Pickup Group dialog box

Add Call Pickup Group

You can add a new Call Pickup Group. Just enter the name of the Call Pickup Group and then click **Add**.

Call Pickup Group Name:

Department:

Add **Cancel**

7.4 Deleting Call Pickup Groups

To delete a Call Pickup Group, follow these steps:

1. Select the Call Pickup Group using the checkbox to the left of the Call Pickup Group.
2. Click on the *Remove Selected* button.

7.5 Viewing and Modifying Call Pickup Groups

To view the details of a Call Pickup Group and to modify its settings, follow these steps:

1. Select that Call Pickup Group by clicking on its entry.
2. This takes you to the page for that Call Pickup Group.

7.5.1 Managing Call Pick Up Group Members

The Members tab displays all the lines in this Call Pickup Group.

Figure 22: Call Pickup Groups Members tab

Business Group Admin Portal name0220

Home
Groups
... Hunt Groups (MLHGs)
... Sim-Ring Groups (MADNs)
... Call Pickup Groups
-Accession CPG
-test-1
-test-2
-test-3
-test-4
-test-5

Call Pickup Group Accession CPG in Department: None

Members Settings

Remove Selected **Add Lines** Add single line: **Add**

<input type="checkbox"/>	Telephone Number	Extension	Name	Department
<input type="checkbox"/>	(234) 555 0220	#220	0220	None
<input type="checkbox"/>	(234) 555 0224	#224	0224	None
<input type="checkbox"/>	(234) 555 0228	#228	0228	None

Adding lines

To add lines to the Call Pickup Group perform one of the following two operations:

1. If you know the number, enter it in the text box on the top right and click **Add**.
2. If you don't know the number, click on **Add Lines**. To select one or more lines to add, use the checkboxes to the left of the lines and click **Add Selected**.

Figure 23: Add Lines to Call Pickup Group dialog box

Add Lines to Call Pickup Group

Select the lines by ticking the boxes and then click Add Selected.

Department: Accession

<input type="checkbox"/>	Telephone Number	Extension	Name
<input type="checkbox"/>	(234) 555 0220	#220	0220
<input type="checkbox"/>	(234) 555 0228	#228	0228
<input type="checkbox"/>	(234) 555 0790	790	0790
<input type="checkbox"/>	(234) 555 0791	791	0791

Add Selected Cancel

Removing lines

To remove a line from the Call Pickup Group, follow these steps:

1. Select the line to remove by using the checkbox to the left of it.
2. Click on the *Remove Selected* button.

7.5.2 Settings

The Settings tab lets you view and change the name of the Call Pickup Group. To change the name, follow these steps:

1. Enter the new name in the text box.
2. Click *Apply*.

8 Managing Short Codes

8.1 Viewing Short Codes

The Short Codes page displays all of the Short Codes in your department.

Figure 24: CommPortal Business Group Admin Short Codes display

The screenshot shows the 'Business Group Admin Portal' interface. On the left is a sidebar with a menu including: Home, Groups, Hunt Groups (MLHGs), Call Pickup Groups, All Lines, Users, Attendants, Group Access, Services, Departments, Short Codes (highlighted), Account Codes, Extensions, Music on Hold, Auto-Attendant, Misc. Settings, Help, and Send Feedback. The main content area is titled 'Short Codes in Department:' with a 'View All' dropdown. Below this is a text box explaining that short codes allow users to quickly dial common numbers. There is a 'Move selected to:' dropdown set to 'Select department' and a 'Move' button. Action buttons include 'Delete Selected', 'Add', 'Add Range', 'Import', and 'Export All'. A table lists short codes with columns: Short Code, Name, Telephone Number or Service Access Code, and Department. A search bar is located above the table.

Short Code	Name	Telephone Number or Service Access Code	Department
*2001	Enfield Sales	(555) 111 0001	London
*2002	Enfield Support	(555) 111 0002	London
*2003	Enfield Acco...	(555) 111 0003	London
*2004	Central HR	(555) 111 0004	None
*2005	Central Help...	(555) 111 0005	None

- To view Short Codes in sub-departments, select the sub-department from the drop-down list at the top of the page.
- To view all of the Short Codes for all departments, select *View All* from the department drop-down list.
- You will only see the **Import** and **Export All** buttons if you are a root administrator for the Business Group. These options allow you to add large numbers of short codes and/or short code ranges. A Business Group can have up to 10,000 short codes and/or short code ranges, of which 1,000 can have names.

8.2 Moving Short Codes to another department

To move Short Codes between departments, follow these steps:

1. Select the Short Code or Short Code range using the checkbox to the left of the Short Code or Short Code range.
2. Select the department you wish to move the Short Code or Short Code range to using the drop-down list at the top of the page.
3. Click on the *Move* button.

8.3 Adding Short Codes

To create a new Short Code, follow these steps:

1. Click on *Add*.
2. Enter the number of the Short Code to add.
3. Enter the telephone number or internal code the Short Code should dial.
 - Note that if you are going to add a name, you can only have one short code that contains this telephone number.
4. If the short code should be in a specific Department, use the drop-down to select it.
5. Optionally add a name for this short code.
 - If this short code is configured with a full national or international number, this name will be delivered as CNAM to the Business Group lines if the external DN matches the incoming caller ID.
 - Named short codes will also be included in Business Group and CommPortal contact lists, including a Business Address book that can be accessed on the CommPortal interface and on supported SIP phones.
 - You can have up to 1,000 named short codes or short code ranges in a Business Group.
6. Click on *Add*.

Figure 25: Add Single Short Code dialog box

Add Single Short Code

Enter the code and (optionally) either the telephone number or the service access code that it maps to, and then click Add

Short Code:

Maps to:

☒ Telephone Number

☐ Service Access Code

Telephone Number:

Department:

Add a name to include an entry in the business directory.

Name (optional):

8.4 Adding Short Code ranges

To create a new Short Code range, follow these steps:

1. Click on *Add Range*.

2. Enter the first and last numbers of the Short Code range to add.
3. Optionally, enter the telephone number or internal code the first Short Code in the range should dial.
4. Optionally, add a name for this short code range. This name will be used for any incoming call from the range of telephone numbers covered by this short code range but will not appear in the Business Group directory or contacts.
5. Click on *Add*.

Figure 26: Add Range of Short Codes dialog box

Add Range of Short Codes

Enter the first and last codes and (optionally) the first telephone number that the range maps to, and then click Add

Range of Short Codes: -

First Telephone Number:

Department:

Add a name to display for incoming calls.

Name (optional):

8.5 Deleting Short Codes and Short Code ranges

To delete Short Codes and Short Code ranges, follow these steps:

1. Select the Short Code or Short Code range using the checkbox to the left of the Short Code or Short Code range.
2. Click on the *Remove Selected* button.

8.6 Modifying Short Codes

To modify an existing Short Code, follow these steps:

1. Click on either the Short Code number or the number the Short Code dials.
2. Modify the details.
3. Click on *Save*.

Figure 27 : Edit Single Short Code dialog box

Edit Single Short Code

To edit this mapping, enter new short code and/or telephone number values and click Save

Short Code:

Telephone Number:

Department:

Add a name to include an entry in the business directory.

Name (optional):

8.7 Modifying Short Code ranges

To modify an existing Short Code range, follow these steps:

1. Click on either the Short Code range numbers or the numbers the Short Code range dials.
2. Modify the details.
3. Click on **Save**.

Figure 28 : Edit Range of Short Codes dialog box

Edit Range of Short Codes

To edit this mapping, enter new short codes and/or telephone number values and click Save

Range of Short Codes: -

First Telephone Number:

Department:

Add a name to display for incoming calls.

Name (optional):

8.8 Importing and Exporting short codes

*You will only see the **Import** and **Export All** buttons if you are a root administrator for the Business Group.*

The **Import** and **Export All** buttons allow you to:

- Import short codes and/or short code ranges from a file in CSV format. This is very useful if you need to add a large number of short codes or short code ranges.

- Export all the short codes and short code ranges that are currently configured in the Business Group in CSV format.

To import a large number of new short codes, follow these steps:

1. Use the **Export All** button to generate a CSV file that has all the existing short codes and short code ranges.
2. Add the new short codes and short code ranges to the CSV file, using the same format.
 - Note that you can only have 1,000 entries in the file. If you need to add more short codes, you will need to use several files.
 - You can have a maximum of 10,000 short codes or short code ranges in a Business Group. However, of these, only 1,000 can be named short codes.
 - CSV files can be viewed and edited using Microsoft Excel, but any leading zeros will be removed, large numbers converted to scientific notation, and other characters may be changed unless UTF-8 encoding is used. To avoid data corruption, use the **From Text/CSV** button and select UTF-8 encoding when importing the short codes CSV file into Excel and also follow the instructions in [Keeping leading zeros and large numbers](#) on Microsoft's Support portal to retain any leading zeros or large numbers.
3. Click the **Import** button.
4. Follow the instructions on the **Import Short Codes** screen to select the CSV file and mandate what should happen if a short code or short code name already exists. Short codes numbers must be unique, but you can use the same name for more than one short code.

Figure 29: Import Short Codes screen

Import Short Codes

Select the file to import short codes from and the action to take when the short code exists then press **Import**. Results of the import can be displayed by clicking the details button.

CSV File: Choose file No file chosen

Action when short code exists: ☒ Overwrite the short code ? ☐ Ignore imported entry ?

Action when name exists: ☒ Use new ? ☐ Keep both ? ☐ Keep existing ?

Import status

added: 0

updated: 0

deleted: 0

ignored: 0

Note: Your BG currently has 130 short codes. You can only import 1000 short codes per import, any other entries will be ignored.

Import
Cancel

9 Managing Extensions

9.1 Viewing Extensions

The Extensions page displays all of the Extensions in your business.

Figure 30: CommPortal Business Group Admin Extensions display

The screenshot shows the 'Business Group Admin Portal' interface. On the left is a blue sidebar with navigation links: Home, Groups (with sub-links for Hunt Groups, Sim-Ring Groups, and Call Pickup Groups), Supervisor Dashboard, All Lines (with sub-links for Users, Attendants, and Group Access), Phones, Services (with sub-links for Departments, Short Codes, Account Codes, Extensions, Call Logs, Call Recording, Music on Hold, Auto-Attendant, Meeting Licenses, and Misc. Settings), Help, and Send Feedback. The 'Extensions' link is highlighted. The main content area is titled 'Extensions' and includes a description: 'Extensions allow your users to quickly dial other numbers in the Business Group. The table below shows the extensions currently in operation. Additionally to transfer calls to voicemail, prefix the extension with 6.' Below the text are buttons for 'Delete Selected', 'Add Range', and 'Add'. A table displays the following data:

Extension	Telephone Number
654 - 880	(501) 901 1000 - (501) 901 1026
700 - 720	(501) 901 1030 - (501) 901 1050
732	(501) 901 1054

9.2 Adding Extensions

To create a single new Extension, follow these steps:

1. Click on *Add*.
2. Enter the number of the Extension to add.
3. Enter the telephone number of the line in your business that this Extension should map to.
4. Click on *Add*.

9.3 Adding Extension ranges

To create a new Extension range, follow these steps:

1. Click on *Add Range*.
2. Enter the first and last Extension numbers to add.
3. Enter the telephone number of first line in your business that this Extension range should map to.

4. Click on *Add*.

Figure 31: Add Extension Range dialog box

[Add Range](#)

To configure a range of extensions, enter the first and last codes and the first telephone number that the range maps to, and then click Add.

Range of Extensions: -
First Telephone Number:

9.4 Deleting Extensions and Extension ranges

To delete Extensions and Extension ranges, follow these steps:

1. Select the Extension or Extension range using the checkbox to the left of the Extension or Extension range.
2. Click on the *Remove Selected* button.

9.5 Modifying Extensions

To modify an existing Extension, follow these steps:

1. Click on either the Extension number or the phone number of the Extension.
2. Modify the details.
3. Click on *Save*.

Figure 32: Edit Single Extension dialog box

[Edit Single](#)

To configure a single extension, enter the extension code and the telephone number, and then click Save.

Extension:
Telephone Number:

9.6 Modifying Extension ranges

To modify an existing Extension range, follow these steps:

1. Click on either the Extension range numbers or the phone numbers the Extension range dials.
2. Modify the details.

3. Click on **Save**.

Figure 33: Edit Extension Range dialog box

[Edit Range](#)

To configure a range of extensions, enter the first and last codes and the first telephone number that the range maps to, and then click Save.

Range of Extensions: -
First Telephone Number:

10 Managing account codes

10.1 Viewing and modifying account code settings

The Account Codes page displays all of your business's account code settings.

10.2 Modifying settings

10.2.1 Modifying call types requiring account codes

Use the checkboxes on the Account Codes page to specify which types of calls will require account codes:

Figure 34: CommPortal Business Group Admin Account Codes display

Business Group Admin Portal John Smith -

Account Codes

The following codes are available on all lines when account codes are validated. Individual lines may also have additional codes.

[Edit List](#) [Apply](#) [Cancel](#)

Account Code Options

Call types requiring an account code

<input type="checkbox"/> National	<input type="checkbox"/> Operator
<input type="checkbox"/> International	<input type="checkbox"/> Directory
<input checked="" type="checkbox"/> Local	<input type="checkbox"/> Carrier Dialed
<input checked="" type="checkbox"/> Premium Rate	<input type="checkbox"/> Local Business Group
<input type="checkbox"/> Regional	<input checked="" type="checkbox"/> Other Business Group

☒ Use validated account codes

Account code length:

Max incorrect attempts before account blocked:

☒ Call types may be overridden per line

☒ Account code length may be overridden per line

☐ Lines may view business group account codes

Lines their own validated account codes.

Assigned Account Codes

1910	Premium Rate
1920	International

- National – Whether account codes are required for long distance calls.
- International – Whether account codes are required for calling international numbers.
- Local – Whether account codes are required for local calls.
- Premium Rate – Whether account codes are required for premium rate (1-900 number) calls.
- Regional – Whether account codes are required for regional calls.
- Mobile (only available in areas which are not part of the North American Numbering Plan (NANP)) – Whether account codes are required for mobile calls.

- Operator – Whether account codes are required for operator calls.
- Directory – Whether account codes are required for directory (411) calls.
- Carrier Dialed – Whether account codes are required to make calls when dialing a carrier code (such as 1010000).
- Local Business Group – Whether account codes are required for local calls to other numbers within your business. Normally calls within your business will be local calls, but if you have multiple sites calls between numbers may be regional or national calls. In this case you need to use the Other Business Group setting.
- Other Business Group – Whether account codes are required for non-local calls to other numbers within your business

Note: You cannot require an account code for emergency calls, toll-free calls, or calls to service access codes.

Once you have selected the call types, click *Apply* to save your changes.

10.2.2 Choosing Validated or Non-validated Account Codes

To use Validated Account Codes, follow these steps:

1. Check *Yes* after *User validated account codes*.
2. Click *Apply*.

To use Non-validated Account Codes, follow these steps:

1. Check *No* after *User validated account codes*.
2. Click *Apply*.

10.2.3 Setting account code length

To specify the length that should be used by your account codes, follow these steps:

1. Enter the length in the text box after *Account code length*:
2. Click *Apply*.

10.2.4 Blocking access after incorrect account codes

If you are using Validated Account Codes, a user's phone line will be blocked after an incorrect account code is entered too many times in succession. To change the number of incorrect entries the user is allowed, follow these steps:

1. Enter the value in the text box after *Max incorrect attempts before account is blocked*:
2. Click *Apply*.

10.2.5 Setting individual line properties

To specify whether various settings can also be specified for each line in your business, perform one of the following operations.

- To allow which types of calls require account codes to be changed for each line, check *Call types may be overridden per line*.
- To allow the length of account codes to be changed for each line, check *Account code length may be overridden per line*.
- To allow lines to view the account codes that you have defined for the whole business, check *Lines may view business group account codes*.
- Set whether each line should be able to view, or both view and change, or not view their own account codes by selecting the relevant setting from the dropdown list at the bottom of the Account Code Options section.
- If you want to have per line account codes, but don't want the user to be able to configure these, configure these by logging on to CommPortal as that user. This is described in Section 10.3. Once you have made your changes, click *Apply* to save them.

10.2.6 Configuring account codes

To modify the account codes, click on *Edit List* at the top of the Accounts code page shown in Figure 34.

The following screen appears.

Figure 35: Manage Assigned Account Codes dialog box

Manage Assigned Account Codes

Account code:	Description:	
<input type="text" value="4567"/>	<input type="text" value="Support"/>	<input type="button" value="Add"/>
0123	Accounts	<input type="button" value="Delete"/>
0234	Sales	<input type="button" value="Delete"/>

1. To add an account code, follow these steps:
 - Enter the code in the *Account code* text box.
 - Enter the description in the *Description* text box.
 - Click on *Add*.

2. To remove an account code, click the delete icon to the right of the account code.
3. To change the description of an account code, remove it and then re-add it with the new description.
4. Once you have finished making changes, click on *OK*.
5. To save your changes you must now click *Apply*.

10.3 Viewing and modifying account code settings for a line

If you want to view or change a particular line's account code settings, follow these steps:

1. Change the settings to allow you to do this as described in Section 10.2.5.
2. Go to the Lines page in CommPortal and log in as the line whose settings you wish to change, as described in Section 3.1.3.

11 Viewing Business Group Call Reports

If you have the appropriate permissions, you can see the Call Reports option on the BG Admin Home page and left-hand menu.

- If your permissions allow you to generate reports, you will see both the reports described in 11.1, Call Reports, and the raw call logs described in 11.2, Business Group Call Logs.
- If your permissions only allow you to download call logs, clicking the Call Reports option will only display the raw call logs described in 11.2, Business Group Call Logs.

11.1 Call Reports

11.2 Business Group Call Logs

Depending on your permissions, you may be able to export raw call logs in CSV format containing details of all calls made (up to a month at a time) to and from the lines within your administrative domain. This includes calls to MLHGs within the Business Group or department. The reports can be filtered by date and department.

You can then import these call logs into other programs, for example Microsoft Excel, for analysis and further processing. When using Microsoft Excel, you should use the Import Data menu option and change the data format of all telephone number columns to text to ensure that the telephone numbers in the call logs are displayed correctly.

To download call logs:

- From the BG Admin page select the *Call Reports* link from the left of the page.
 - If you only have permission to access raw call logs, you will see the following screen.
 - If you also have permission to view Call Reports, use the **Download Logs** tab shown on **Error! Reference source not found.** to access the Call Logs panel.

Figure 36: CommPortal Business Group Admin Call Logs display

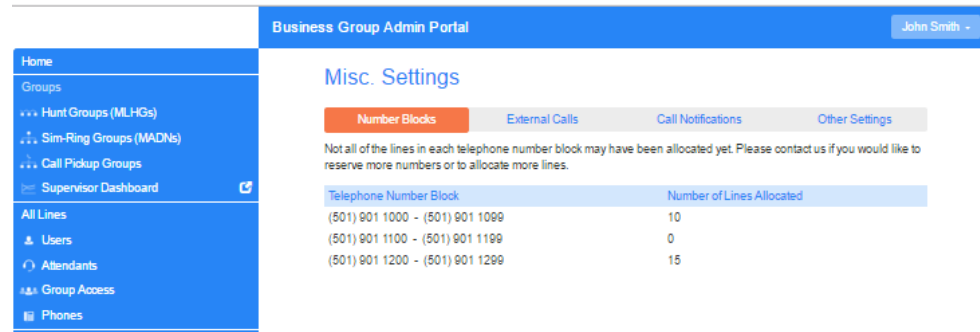
The screenshot displays the 'Business Group Admin Portal' interface. On the left is a blue sidebar with navigation links: Home, Groups (with sub-links for Hunt Groups (MLHGs) and Call Pickup Groups), All Lines (with sub-links for Users, Attendants, Group Access, and Phones), Services (with sub-links for Short Codes, Call Reports, Music on Hold, Auto-Attendant, and Misc. Settings), Help, and Send Feedback. The 'Call Reports' link is highlighted. The top header is blue with the text 'Business Group Admin Portal' and a 'Support admin' button. The main content area is titled 'Call Reports' and features two tabs: 'Summary' (selected) and 'Reports'. To the right of the tabs is an orange 'Download Logs' button. Below the tabs, a text prompt says 'Download CSV report of all calls to and from lines in your administration domain.' The 'Date Range' section includes 'Start date' and 'End date' labels, each followed by three input boxes for month, day, and year, and a calendar icon. The 'Department' section has a dropdown menu currently showing 'Sales support'. A note below the dropdown states: 'Note, the data will include the chosen department and all sub departments.' At the bottom of the form is a blue 'Download' button.

- Enter the start and end dates in the boxes provided. You can download Call Logs for a time frame of up to 30 days.
- Use the dropdown to select the department for the call logs that you would like to see.
- Click the *Download* button. The report will be downloaded on to your computer.

12 Viewing miscellaneous settings

The Misc. Settings page allows you to view and change a number of settings associated with your Business Group.

Figure 37: CommPortal Business Group Admin Number Misc. Settings display



It includes the following tabs.

- Number Blocks, described in section 12.1.
- External Calls, described in section 12.2.
- Call Notifications, described in section 12.3.
- Other Settings, described in section 12.4.

12.1 Viewing Number Block settings

The Number Blocks tab displays all of the telephone numbers which we have assigned to your business.

12.2 Viewing External Call settings

The External Calls tab lets you view the settings that are in place for calls that are external to your business.

- External Calls – This can take one of the following values:
 - Not Permitted – Calls outside of your business are not permitted.
 - Unlimited – There is no explicit limit to the number of concurrent external calls you can have, but there may be a limit to either the number of Incoming or Outgoing Calls you can make.
 - Limited – There is a limit to the number of concurrent calls you can have to numbers outside of your business.
- Maximum number of external calls – If the value of External Calls is Limited, the value of this setting specifies how many concurrent external calls there may be at any time.

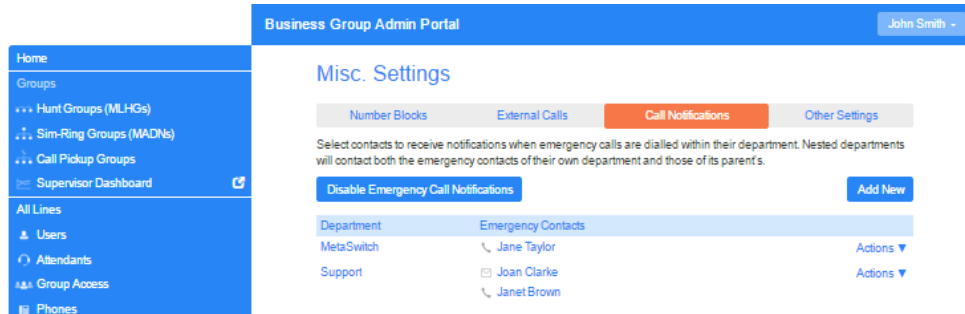
- Incoming Calls – This can take one of the following values:
 - Not Permitted – Inbound calls from outside of your business are not permitted.
 - Unlimited – There is no limit to the number of concurrent incoming external calls you can have, although you are still subject to any Maximum number of external calls.
 - Limited – There is a limit to the number of concurrent calls you can have from outside of your business.
- Maximum number of simultaneous incoming calls – If the value of Incoming Calls is Limited, the value of this setting specifies how many concurrent incoming external calls there may be at any time.
- Outgoing Calls – This can take one of the following values:
 - Not Permitted – Outgoing calls to outside your business are not permitted.
 - Unlimited – There is no limit to the number of concurrent outgoing external calls you can have, although you are still subject to any Maximum number of external calls.
 - Limited – There is a limit to the number of concurrent calls you can have to numbers outside of your business.
- Maximum number of simultaneous outgoing calls – If the value of Outgoing Calls is Limited, the value of this setting specifies how many concurrent incoming external calls there may be at any time.
- Local carrier code – This is a code that identifies which carrier will be used for any local calls your business makes. It is sometimes called PIC2.
- Long distance carrier code – This is a code that identifies which carrier will be used for any long distance calls your business makes. It is sometimes called PIC1.
- International carrier code – This is a code that identifies which carrier will be used for any international calls your business makes. It is sometimes called PIC3.

12.3 Configuring Call Notifications

If you are a root BG Admin, you can use the Call Notifications tab to enable or disable call notifications. These Call Notifications are used to alert selected people whenever an emergency call is made by one of the lines in the Business Group.

When Call Notifications are enabled in your Business Group, you can view and amend the targets who will receive either an email or an outdial notification whenever an emergency call is made by one of the lines in the Business Group. If you are a Department administrator, you will only see targets configured in the departments and sub-departments you administer.

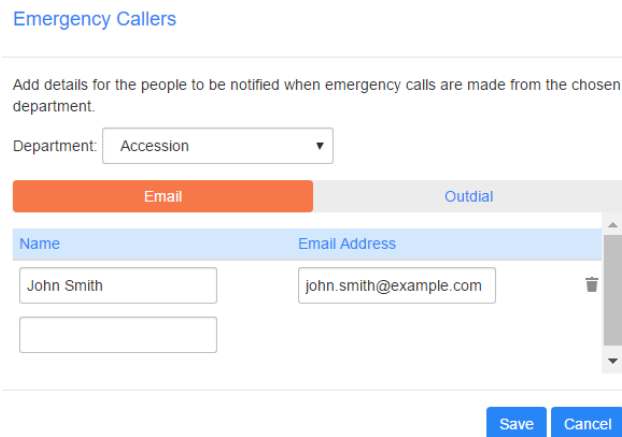
Figure 38: Call Notifications tab



- If you want to add a new call notification target, click the **Add New** button.
- If you want to edit an existing call notification target, expand the *Actions* drop-down and click *Edit*.

Both these actions launch the Emergency Callers pop-up.

Figure 39: Emergency Callers pop-up



- Use the drop-down alongside *Department* to select the Department whose lines should trigger a call notification. If some targets have already been configured for a department, these will be displayed on the pop-up.
- Select the appropriate tab for either an Email or an Outdial call notification.
- Fill in the name and either the telephone number (which can be any number and does not have to be a line within this Department or Business Group) or email address as appropriate.
- Click **Save**.

If this notification target has already been configured at Business Group level and a notification needs to be sent, they will only receive a single notification.

12.4 Viewing other settings

The Other Settings tab lets you view settings for Restricted Subscriber Messaging, the Internal Operator Number, and internal extensions.

- Restricted Subscriber Messaging – This determines whether members of this Business Group can send messages only to other members of the same Business Group.
- Use Internal extensions – This determines whether or not CommPortal displays the Business Group extension number associated with a directory number where possible.
- Internal operator number – This determines the number used to access this Business Group's operator.

13 Auto-Attendant – Easy Attendant / Premium Attendant

13.1 Overview

MetaSphere provides two solutions for Auto Attendant functionality.

- Easy Attendant offers a very simple automated telephone menu.
 - Callers to a business are directed to the automated TUI, providing key options to transfer to specific departments or individuals in the business, to transfer to a voicemail account directly, or to listen to a recorded announcement.
 - You can choose to either have a single menu that plays when Easy Attendant is turned on, or two different menus for business and non-business hours that are used according to a pre-defined schedule.
 - When Easy Attendant is turned off, you can either forward callers to another telephone number or play a message informing the caller that your business is currently closed.
- Premium Attendant, aimed at small and medium business subscribers, offers an increased level of service compared to Easy Attendant.
 - In addition to all the features offered by Easy Attendant, Premium Attendant allows multiple menus with a finer scheduling control.
 - It also includes more call handling options, such as Voicemail by Name and Voicemail by Extension, as well as greater control over the actions taken for any given key press.

Both Easy and Premium Attendant can also be configured to allow callers to dial an extension at any point in the menu and not just on a Dial by Extension menu option. If you want to use this option, you must enable it as described in 13.2.4 and you should also ensure that your initial greeting mentions the option that a caller who knows the extension they require can dial it immediately.

13.2 Easy Attendant

This section outlines the required steps for configuring Easy Attendant.

13.2.1 Planning your Easy Attendant

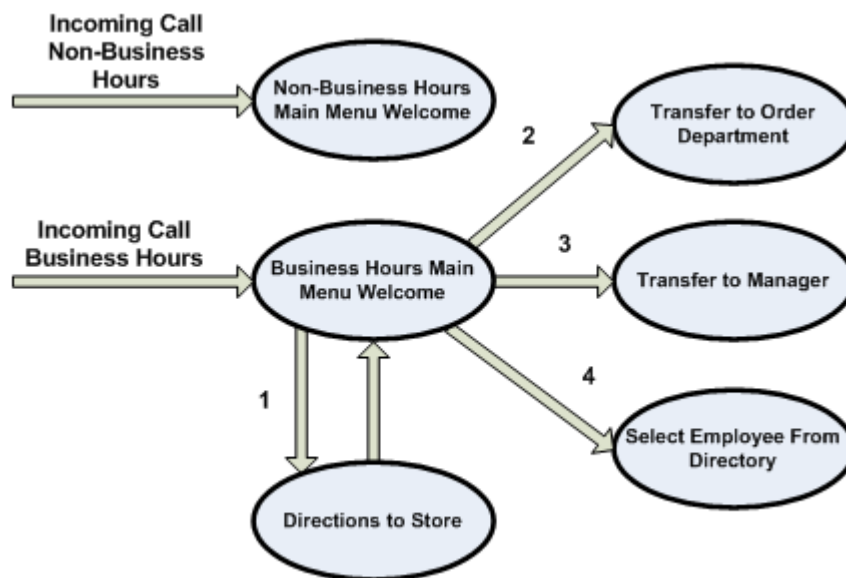
Before you start to set up your Easy Attendant, it is a good idea to sketch out the operation of each menu on paper. This allows you to plan what options you need from the menu and how each one will operate.

For example, the main menu for a pizza company may need to include the following options:

1. Play an announcement giving directions to the store, then return to the main menu so that the user can select another option.
2. Place an order with a server.
3. Speak to the manager.
4. Speak to another employee using dial-by-name.

The diagram below shows how this menu would operate, including the key presses to access each option:

Figure 40: Easy Attendant call handling example



In the diagram, option 1 (directions to the store) is shown with an arrow returning to the main Welcome menu so that the caller can select another option if required. This is because this option is playing a recording. The other options do not allow the return to the menu.

For out-of-hours and holiday operation, Easy Attendant may provide an announcement that the store is closed (without allowing the caller to select any options), or it may provide an alternative set of menu options.

13.2.2 Logging on to Easy Attendant

To configure your Easy Attendant, log into the Easy Attendant, following these steps:

- From the BG Administrator portal, select *Lines* and then click the *Individual Line* icon on the far right side of the page. As an alternative, you can access the CommPortal user login screen and enter the Easy Attendant Number and Password.
- If this is the first time you have logged in, or if no Easy Attendant configuration has yet been set up, you will see a Welcome screen.

Figure 41: Easy Attendant Welcome screen

Welcome to Easy Attendant

Easy Attendant answers your calls and plays an automated menu with options that you define. To start using the service please select from the following two options:

- ☐ **Use a Schedule**
Different options during business hours and non-business hours.
- ☐ **Use a Simple Menu**
Same options at all times.

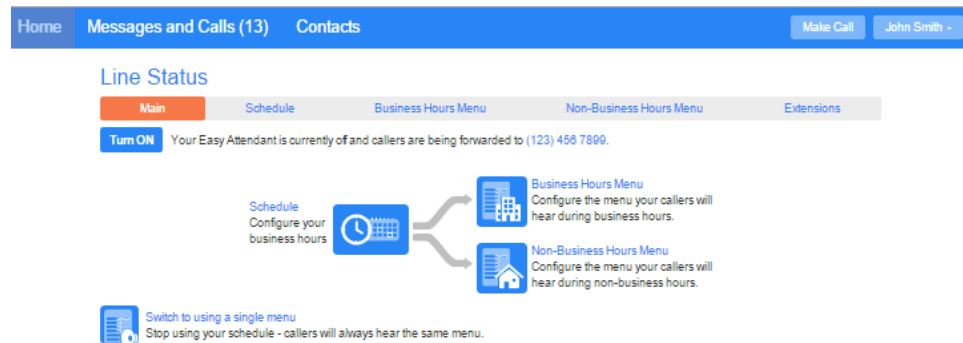
Note: you can switch between these options later if your requirements change.

Continue...

- Use the radio buttons to select either a scheduled menu for business hours and non-business hours or a simple menu that will be played whenever Easy Attendant is turned on, and press **Continue**. (You can change this later if you need to.)
- The screen then displays the Easy Attendant portal.
- This screen enables you to
 - turn your Easy Attendant on and off (Easy Attendant must be turned off while you are configuring it)
 - configure your Easy Attendant menus
 - set the Schedule, if you are using different menus for business hours and non-business hours.

If you selected to use a single menu, this screen will have a single Easy Attendant Menu tab.

Figure 42: Easy Attendant Portal

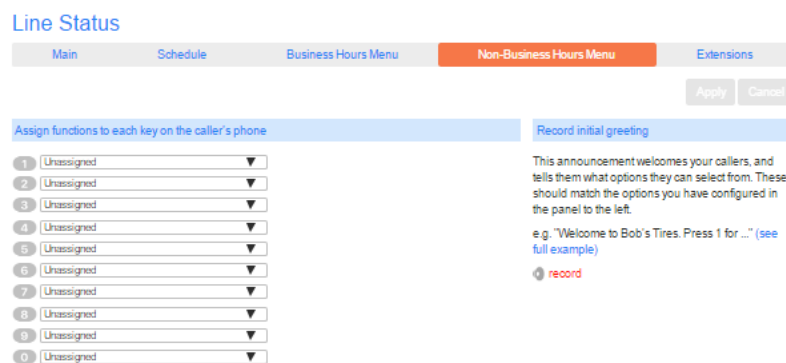


13.2.3 Configuring Easy Attendant menus and schedules

You should now begin configuring your Easy Attendant menu(s) and schedules.

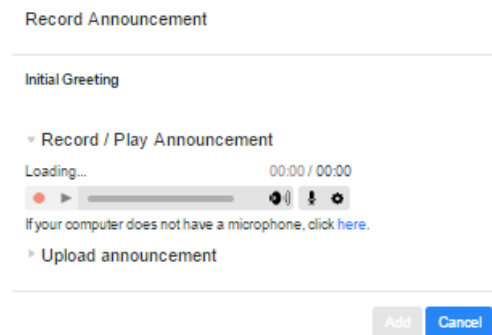
- Select either the Business Hours Menu tab or, if you are using a single menu, the Easy Attendant Menu tab.
- First, set up your Easy Attendant by recording the initial greeting.
 - If you are using the Dial By Extension At Any Time option, you should ensure that this initial greeting includes the option for a caller to dial an extension immediately if they know the extension number of the person or department they want to reach.

Figure 43: Recording an initial greeting



- Select the *record* option on the lower right of the screen. This launches the announcement recorder, where you can either record an announcement, or upload a pre-recorded announcement.

Figure 44: Announcement recorder



- Once you have recorded or uploaded your initial greeting, you can return to the Menu tab.
- Now you are ready to define the specific menu items as defined in your plan to one of the following options.
 - Play Announcement
 - Transfer to Phone
 - Transfer to VoicemailDial by Extension
 - Dial by Name
- If you are using a different menu for non-business hours, you should now set up the initial recording and configure the menu options on the Non-Business Hours Menu tab.
- Next you will need to establish your working hours by selecting the *Schedule* tab. Once in the Schedule screen, click on the *Business Hours* key and then click in the calendar and while holding down the left mouse button drag the mouse across the calendar to indicate the business hours. In the example below, the business hours are Monday – Friday from 9:00 am until 5:00 pm. Any other time are considered non-working hours.

Figure 45: Easy Attendant Schedule tab

Line Status

Main Schedule Business Hours Menu Non-Business Hours Menu Extensions

Apply Cancel

Configure your business hours by clicking on the appropriate cells in the grid. Click and drag to select multiple cells.

	Mon	Tue	Wed	Thu	Fri	Sat	Sun
1 am							
2 am							
3 am							
4 am							
5 am							
6 am							
7 am							
8 am							
9 am							
10 am							
11 am							
12 pm							
1 pm							
2 pm							
3 pm							
4 pm							
5 pm							
6 pm							
7 pm							
8 pm							
9 pm							
10 pm							
11 pm							

Special Days

Configure days when your normal weekly schedule does not apply, for example vacations. On these days, your non-business hours menu will be played all day.

Zoom In

Key: ☒ Business Hours ☐ Non-Business Hours

- Next you will need to select any non-working days such as holidays by clicking on the calendar icon in the Special Days section of the Schedule page. You can choose individual non-working days by clicking on the date in the calendar, or you can use the *Choose Public Holidays* option to automatically add public holidays for your region.

Figure 46: Special Days

Configure days that will be your special days.

During special days, your Non-Business Hours menu will be active.

Click a date on the calendar to make it a special day, or click an existing special day to make it normal again. You can also click and drag to change several days at once.

April 2017 May 2017 June 2017

Mon Tue Wed Thu Fri Sat Sun Mon Tue Wed Thu Fri Sat Sun Mon Tue Wed Thu Fri Sat Sun

1 2 1 2 3 4 5 6 7 1 2 3 4

3 4 5 6 7 8 9 8 9 10 11 12 13 14 5 6 7 8 9 10 11

10 11 12 13 14 15 16 15 16 17 18 19 20 21 12 13 14 15 16 17 18

17 18 19 20 21 22 23 22 23 24 25 26 27 28 19 20 21 22 23 24 25

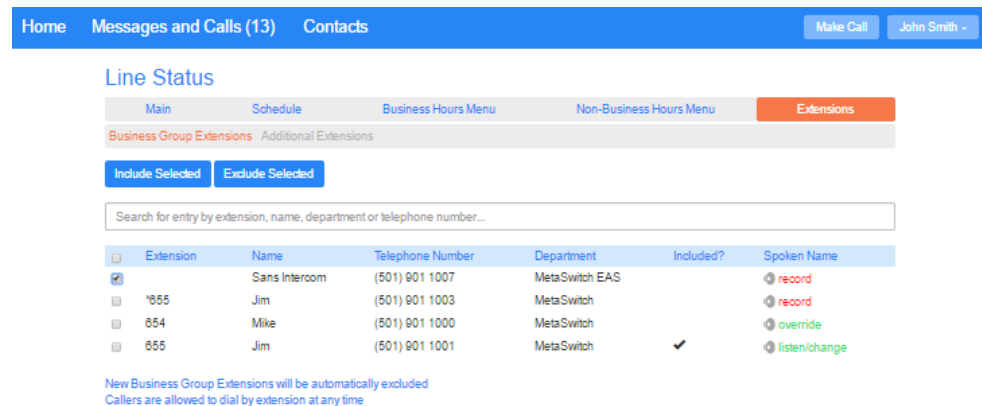
24 25 26 27 28 29 30 29 30 31 26 27 28 29 30

Go To Today Clear All Add Public Holidays Ok Cancel

13.2.4 Configuring your Easy Attendant extensions

If you will be using "Dial by Name", then you will need to define which extensions will participate in dial by name and record the names of users in the extensions tab. Additionally, if you want to use the **Dial By Extension At Any Time** option, you must configure it here.

Figure 47: Easy Attendant Extensions tab

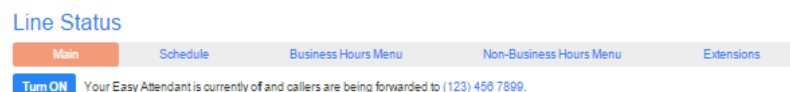


- The *Callers are allowed to dial by extension at any time* link at the foot of the screen means that callers can dial an extension at any point in the Easy Attendant menu and not just on a Dial by Extension menu option. If you want to restrict dial by extension to Dial by Extension menu options only click on this link. It will now display that *Callers are allowed to dial by extension only after selecting "Dial by Extension" menu option*.
- To include or exclude an extension from dial by name, select the extension(s) by ticking the checkbox on the left of each extension and then click either *Include Selected* or *Exclude Selected*.
- To record the user's name click on the **record** link for the user. If a name has already been recorded, this link will display **listen/change**.
- To record names to be used for dial by name, click the record icon. If the spoken name has already been created, the screen will show listen/change rather than record, and you can click this link to hear the existing recording and change it if you need to.
- Use this recording interface to record the name or upload a spoken name recording, and click the **Save** button.

13.2.5 Activating Easy Attendant

The final step in this process is to activate your Easy Attendant by clicking the *Turn On* button from the Main Tab. Your Easy Attendant is now active.

Figure 48: Turn Easy Attendant On button



13.3 Premium Attendant

This section outlines the required steps for configuring the Premium Attendant.

13.3.1 Planning your Premium Attendant

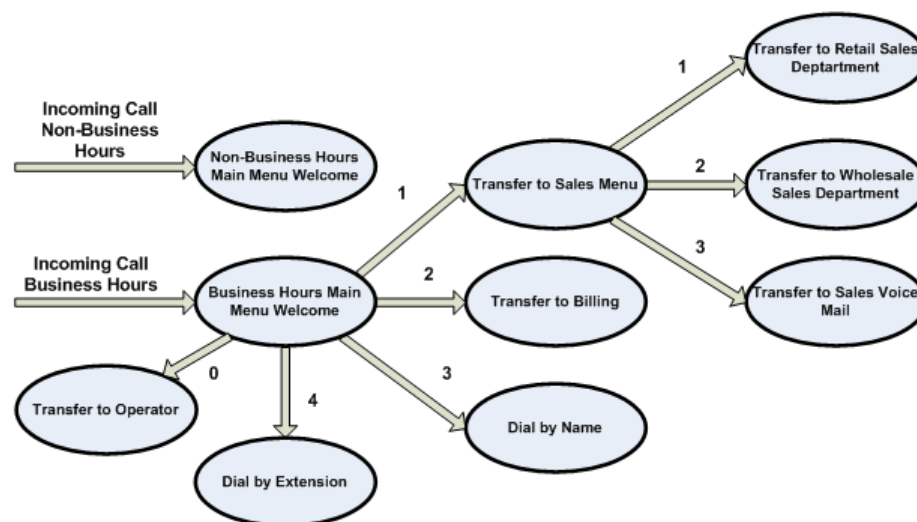
Before you start to set up your Premium Attendant, it is a good idea to sketch out the operation of each menu on paper. This allows you to plan what options you need from the menu and how each one will operate.

For example, the main menu for a sales company may include the following options:

1. Have a scheduled Attendant.
2. Provide a main menu for business hours that provides the companies default greeting and menu.
3. Have the ability to transfer to a sales menu that provides additional menu options.
4. Transfer to speak with the Billing department.
5. Dial by name.
6. Dial by extension.
7. Transfer to an operator.

The sketch below shows how this menu would operate, including the key presses to access each option:

Figure 49: Premium Attendant call handling example



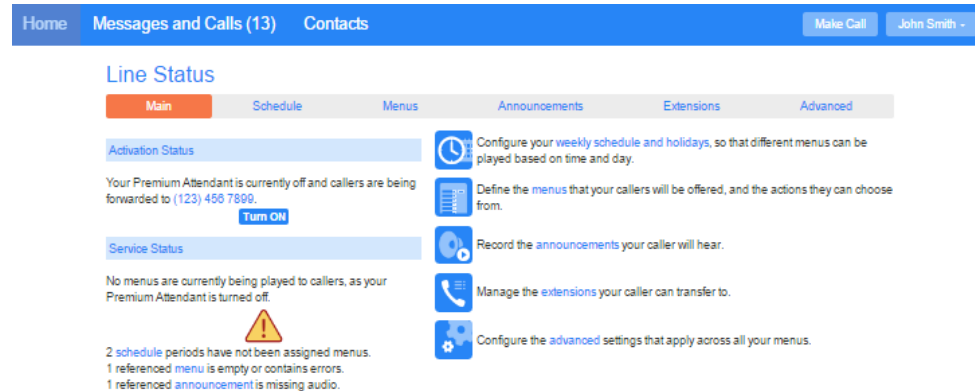
For out-of-hours and holiday operation, Premium Attendant may provide an announcement, for example saying that the business is closed, (without allowing the caller to select any options), or it may provide an alternative set of menu options.

13.3.2 Logging into Premium Attendant

To configure your Premium Attendant log into the Auto-Attendant, following these steps:

From the BG Administrator portal, select *Lines* and then click the *Individual Line icon* on the far right side of the page. As an alternative, you can access the CommPortal user login screen and enter the Premium Attendant Number and Password. The screen then displays the Premium Attendant portal.

Figure 50: Premium Attendant Portal



13.3.3 Configuring Premium Attendant Schedule

You can configure your weekly schedule by clicking on the *Weekly Schedule and Holidays* icon. Once in the Schedule screen, click on the *Business Hours* key and then click in the calendar and, while holding down the left mouse button, drag the mouse across the calendar to indicate the business hours. In the example below, the business hours are Monday – Friday from 9:00 am until 5:00 pm. Any other time are considered non-working hours.

Figure 51: Premium Attendant Schedule tab

Line Status

Main Schedule Menu Announcements Extensions Advanced

Add New Period Rename Delete Apply Cancel

Periods Business hours

During this period, use this menu: Menu 1

All other times Special Days

	Mon	Tue	Wed	Thu	Fri	Sat	Sun
1 am							
2 am							
3 am							
4 am							
5 am							
6 am							
7 am							
8 am							
9 am							
10 am							
11 am							
12 pm							
1 pm							
2 pm							
3 pm							
4 pm							
5 pm							
6 pm							
7 pm							
8 pm							
9 pm							
10 pm							
11 pm							

Zoom In

Next you will need to select any non-working days such as holidays by clicking on the calendar icon in the Periods section of the Schedule page. You can choose individual non-working days by clicking on the date in the calendar, or you can use the *Choose Public Holidays* option to automatically add public holidays for your region.

Figure 52: Premium Attendant Special Days

Line Status

Main Schedule Menu Announcements Extensions Advanced

Add New Period Rename Delete Apply Cancel

Periods Special Days

During this period, use this menu: Select Menu...

Click a date on the calendar to make it a special day or click an existing special day to make it normal again

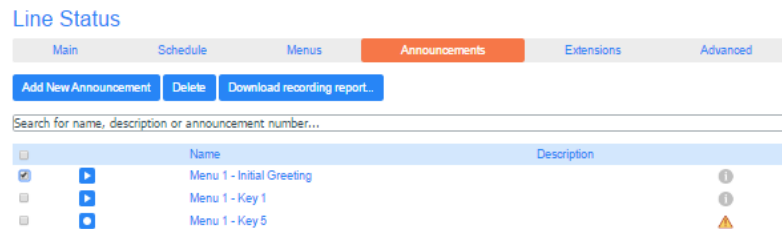
April 2017							May 2017						
Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun
						1	1	2	3	4	5	6	7
3	4	5	6	7	8	9	8	9	10	11	12	13	14
10	11	12	13	14	15	16	15	16	17	18	19	20	21
17	18	19	20	21	22	23	22	23	24	25	26	27	28
24	25	26	27	28	29	30	29	30	31				

Go To Today Clear All Add Public Holidays

13.3.4 Configuring Premium Attendant Announcements

In order to use your Premium Attendant you will need to record or upload the announcements that will be played as either your primary Business Hours or Non-Business Hours greeting as well as any other recorded announcements required. The example in section 13.3.1 would require three announcements, one each for Business Hours, Non-Business hours and the Sales menu. Click in the Announcements tab to begin configuration.

Figure 53: Premium Attendant Announcements tab



Click the *Add New Announcement* button and then follow the steps below.

Figure 54: Add Announcement

The screenshot shows the 'Add Announcement' form. It has two input fields: 'Name' and 'Description'. Below the 'Description' field is a dropdown menu labeled 'Record / Play Announcement'. Below the dropdown is a media player interface showing 'Loading...' and a progress bar. At the bottom of the form are two buttons: 'Add' and 'Cancel'.

1. Enter the name and description of your announcement.
2. To record your announcement using a microphone or headset connected to your computer, click the red record button.
3. When you have finished recording, press the stop button and click on the *Add* button at the bottom of the interface.

To upload pre-recorded announcements, select *Upload Announcement* from the drop-down menu on the announcement recorder and browse to the location of your announcement and click upload. After your upload has completed click the *Add* button.

Figure 55: Uploading an Announcement

Menu 1 - Key 5

Name:

Description:

Upload announcement ▼

Record your announcement and upload it below valid formats are: G711 WAV (8-bit, ulaw / alaw, mono, 8kHz), 16-bit PCM WAV (16-bit, PCM, mono, 16kHz).

New file: No file chosen

Current file: No file currently uploaded

To record the announcement using your telephone, do the following.

1. Create the announcement by adding a name and description and selecting *Record By Phone* from the drop-down menu.
2. Make a note of the announcement number and then click on the *Add* button.
3. Dial the main number for your Premium Attendant service provided by your service provider, enter the number for your Premium Attendant, enter the pin and then follow the prompts to record your announcement using the announcement number noted in the previous step.

Figure 56: Recording Announcements by Phone

Menu 1 - Key 5

Name:

Description:

Record by Phone ▼

To record this announcement, dial your Premium Attendant access number, and follow the prompts to edit announcements. Enter the announcement number when prompted.

13.3.5 Configuring Premium Attendant Menus

Next you will need to set up your Premium Attendant menu options. By default, there are two menus defined in Premium Attendant. These could be used as your main business hours menu and you main non-business hours menu. You can add additional menus as required by clicking the *Add* button.

Figure 57: Premium Attendant Menus tab

Line Status

Main Schedule **Menus** Announcements Extensions Advanced

Add New Menu Delete Apply Cancel

Menus

Search for...

Menu 1
Menu 2

General Keys Timeout References

General

This menu has not been set up.

Name Business Hours Menu

Description The Business Hours Menu for Premium Attendant

Menu announcement Select announcement...

- Begin to configure your menu by providing a name and description and selecting the Menu announcement to be used by this menu, and then click *Apply*.
- Next you will need to configure the action for each key pressed for your menu by selecting the *Keys* link and then selecting an option using the dropdown menus for each key pressed in the menu.

Figure 58: Premium Attendant key configuration menu

Line Status

Main Schedule **Menus** Announcements Extensions Advanced

Add New Menu Delete Apply Cancel

Menus

Search for...

Menu 1
Menu 2

General **Keys** Timeout References

1 Use Default
2 Use Default
3 Use Default
4 Use Default
5 Transfer to Phone
6 Transfer to Voicemail
7 Dial by Extension
8 Dial by Name
9 Voicemail by Extension
10 Voicemail by Name
11 Self-care by Extension
12 Transfer to Operator
13 Intercept Mailbox
14 Go to Menu
15 Return to Previous Menu
16 Replay Menu
17 Announcement - Return
18 Announcement - Hang up
19 Hang up

Do Nothing
Transfer to Phone
Transfer to Voicemail
Dial by Extension
Do Nothing
Do Nothing
Do Nothing
Do Nothing
Do Nothing
Do Nothing
Do Nothing
Do Nothing
Do Nothing
Do Nothing
Do Nothing
Do Nothing
Do Nothing
Do Nothing
Do Nothing

The options available for each key are as follows:

- Use Default (This option is default for all keys for new menus)
- Transfer to Phone
- Transfer to Voicemail (CoS controlled)
- Dial by Extension (CoS controlled including whether an announcement is automatically played giving initial instructions when this key is pressed, or whether these instructions must be recorded by the subscriber in the menu announcement)
- Self-care by Extension (CoS controlled, allows subscribers with mailboxes only identified by extension numbers to dial in to their mailbox)

- Dial by Name (CoS controlled)
- Voicemail by Extension (CoS controlled)
- Voicemail by Name (CoS controlled)
- Transfer to Operator (CoS controlled, and only available for Premium Attendants in a Business Group)
- Intercept mailbox (CoS controlled)
- Go to Menu
- Return to Previous Menu
- Replay Menu
- Announcement – Return
- Announcement – Hang up
- Hang up

Next, you will need to configure the timeout behavior of your menu to address callers that do not press a key in this menu. Enter the timeout duration and the timeout behavior from the dropdown list as seen below and click *Apply*.

Figure 59: Premium Attendant timeout configuration menu

The screenshot shows the 'Line Status' interface with the 'Menus' tab selected. On the left, there is a search bar and a list of menus: 'Menu 1' and 'Menu 2'. The 'Menu 1' item is highlighted. On the right, the 'General' sub-tab is active. It features a checkbox labeled 'Override timeout behavior.' which is checked. Below this, there is a field 'Set timeout duration to' with a dropdown menu set to '10' and the unit 'seconds'. Underneath, a section titled 'After timeout, perform the following action' contains a large dropdown menu. The dropdown is open, showing a list of actions: 'Hang up', 'Transfer to Phone', 'Transfer to Voicemail', 'Dial by Extension', 'Dial by Name', 'Voicemail by Extension', 'Voicemail by Name', 'Selfcare by Extension', 'Transfer to Operator', 'Intercept Mailbox', 'Go to Menu', 'Return to Previous Menu', 'Replay Menu', 'Announcement - Return', 'Announcement - Hang up', and 'Hang up'. The 'Hang up' option at the bottom is highlighted in blue.

13.3.6 Configuring Premium Attendant extensions

If you plan on using dial by name or dial by extension, you will need to select the extensions and record a name for the dial by name.

Figure 60: Premium Attendant Extensions tab

Line Status

Main Schedule Menus Announcements **Extensions** Advanced

Business Group Extensions Additional Extensions

Include Selected Exclude Selected

Search for entry by extension, name, department or telephone number...

<input type="checkbox"/>	Extension	Name	Telephone Number	Department	Included?	Spoken Name
<input type="checkbox"/>		Sans Intercom	(501) 901 1007	MetaSwitch EAS	✓	record
<input checked="" type="checkbox"/>	*855	Jim	(501) 901 1003	MetaSwitch	✓	record
<input type="checkbox"/>	854	Mike	(501) 901 1000	MetaSwitch	✓	override
<input type="checkbox"/>	855	Jim	(501) 901 1001	MetaSwitch	✓	listen/change

New Business Group Extensions will be automatically excluded
 Callers are allowed to dial by extension only after selecting "Dial by Extension" menu option

The procedure for configuring your Premium Attendant extensions is the same as for Easy Attendant, as described in 13.2.4.

13.3.7 Configuring Premium Attendant advanced options

In order to configure the advanced settings for your Premium Attendant, click on the *Advanced* tab and define the default handling for each key press. These actions will be available to callers in all menus unless you assign an alternative action to the key in the per menu configuration.

Figure 61: Premium Attendant Advanced Settings tab

Line Status

Main Schedule Menus Announcements Extensions **Advanced**

Default keys Error handling Other settings

Apply Cancel

This page allows you to configure default actions for each key that a caller can press.
 These actions will be available to callers in all menus unless you assign an alternative action to the key in the per menu configuration.

1	Do Nothing	
2	Transfer to Phone	(987) 654 3210
3	Transfer to Voicemail	(987) 654 3211
4	Dial by Extension	
5	Do Nothing	
6	Do Nothing	
7	Transfer to Phone	e.g. (123) 456 7890
8	Do Nothing	
9	Do Nothing	
0	Transfer to Operator	29305
#	Do Nothing	
*	Do Nothing	

Next, click on the *Error Handling* link and set the value and behavior for Timeout, Call Transfers, Unknown Input and Invalid Extensions.

Figure 62: Premium Attendant Error Handling menu

Line Status

Main Schedule Menus Announcements Extensions **Advanced**

Default keys Error handling Other settings

Apply Cancel

Timeout

Menus time out if a caller doesn't press a key within 10 seconds.

After 1 menu timeouts:

Intercept Mailbox

(020) 812 3123

Call Transfer

Ring: for 45 seconds

If a call transfer fails: Return to the menu

After 2 call transfer failures:

Transfer to Operator

29305

Unknown Input

If the caller selects an unassigned key 4 times:

Hang up

Invalid Extension

If the caller dials an invalid extension 1 times:



Announcement - Hang up

Select announcement...

13.3.8 Activating Premium Attendant

Finally, you will need to activate your Premium Attendant by going to the Main page and selecting the Turn On button.

The Premium Attendant interface uses the following error messages and icons to alert you to incorrect or missing configuration. These are produced on page load, and are not updated dynamically.

- The Main tab has a Service Status panel that states your current schedule period and the menu that callers will hear. It also reports if you have errors in any menus, or one or more announcements is missing audio.
- The Schedule and Menus pages use a banner line to report any errors.
- The following icons are used to indicate incorrect or incomplete configuration
 -  error icon
 -  warning icon

If there are any errors in your configuration, you will be warned against turning on Premium Attendant, and in some cases this will be prohibited. You should therefore resolve the configuration errors before attempting to turn Premium Attendant on.

14 Music On Hold

If your system uses Music On Hold, you will be able to access your Music On Hold administration system from the CommPortal BG Admin interface.

14.1 CommPortal access

14.1.1 Logging in

To log into the Music On Hold system, click the Music On Hold link at the bottom of the left hand side of CommPortal. This opens up a new browser window with the Music On Hold administration system.

Figure 63: Music On Hold administration system

Music On Hold Mappings in department: Reference Design BG1 (root)

security mappings resources

Directory number	Initial resource	Action	Follow-up resource	Start Point	Duration	Actions
Default	12 - Piano	Repeat	Global 10 - Gain_padded_media	Start		Edit

Directory number: 222-333-8800 Initial resource: None Action: Repeat Follow-up resource: Start Point: Start Duration: Add

0 of 999 mappings used

Note: If a line has been recently added to or moved within this organization, then it may take up to one business day for the change to affect Music On Hold.

If you are the administrator for the top-level department of your business then you will see three links at the top of the page, each taking you to a different section of the Music On Hold administration system.

- Security – View and configure your security settings.
- Mappings – This section allows you to configure different recordings to be played when different lines within your business put callers on hold.
- Resources – This section allows you to upload and manage your recordings.

If you are not an administrator for the top-level department of your business you will not see Resources as only administrators for the top-level department can manage recordings.

14.1.2 Viewing and changing your security settings

To view your security settings, select the Security section.

Figure 64: Music On Hold Security section

Music On Hold

security mappings resources

Admin password for telephone access (valid only for the current administrator)

Apply

As well as accessing the Music On Hold system using CommPortal, you can also use your phone to access it. Using this page you can view and change the password you will need to enter to use the phone access. To change your password, follow these steps:

1. Enter the new password in the text box.
2. Click *Apply*.

14.1.3 Managing recordings

To access the recordings section, click on the *Resources* link.

Figure 65: Music On Hold Resources section

Music On Hold

security mappings resources

Global Media List

ID	Description	Length
10	Gain_padded_media	303 seconds

ID	Description	Gain	File size	Length	Actions
11	Seasonal	0	1.79 MB	234 seconds	Edit Delete
12	Piano	0	1.87 MB	245 seconds	Edit Delete

ID Description Upload local resource file Actions

[Choose File](#) No file chosen [Add](#)

Disk Used: 3.66 MB of 10 MB used.
Resources: 2 of 10 used.

Global Media List

The Global Media List section specifies any recordings that we have made available for your use. Whether we make any recordings available to you depends on which service you have subscribed to. You cannot add or remove recordings from the Global Media List.

Your own recordings

The second section displays any recordings that you have uploaded to the system, either using this web interface or via the phone access.

Recording limits

At the bottom of this section you will see:

- how many MB of storage you have used
- how many MB of storage you are allowed
- how many recordings you have uploaded
- how many recordings you are allowed.

The system will not allow you to exceed either your storage limit or the maximum number of recordings you are allowed.

Recording formats

You can upload recordings to the system in either WAV or MP3 format.

Adding a recording

To add your own recording, follow these steps:

1. Enter an ID for this recording in the *ID* text box. This ID must be between 10 and 99.
2. Enter a description for this recording in the *Description* text box.
3. Click on *Browse* and select the recording you wish to upload. This must be either a .wav or .mp3 file.
4. Click on *Add*.

Depending on the size of the recording you are uploading this process may take a few seconds.

Modifying a recording

To change the description of a recording, follow these steps:

1. Click on the *Edit* button to the right of the recording.
2. Edit the *Description* field.
3. Click *Save*.

4. To change the volume at which a recording will play, follow these steps:
5. Click on the *Edit* button to the right of the recording.
6. Select a new *Gain* value from the drop-down list.
 - Select 0 to play the recording at its original volume,
 - Select +1, +2 or +3 to play the recording louder, with +3 being the loudest.
 - Select -1, -2 or -3 to play the recording quieter, with -3 being the quietest.
7. Click *Save*.

Playing a recording

You can play a recording that you have uploaded by clicking on the *ID* or *Description* link for that recording. Note that this will play the recording at its original volume – the *Gain* setting has no impact on playing a recording through this interface.

If you want to check the effect of changing the volume of a recording you should log into the phone interface and play the recording from there. For more details on this, see Section 14.2.1.

Removing a recording

To remove a recording click on *Delete* to the right of the recording you wish to delete.

14.1.4 Assigning recordings to lines

You can assign recordings either to all lines in your business, or different recordings per line. To do this you need to access the mappings section.

Figure 66: Music On Hold Mappings section

Music On Hold Mappings in department: PR_BG (root)

security mappings resources

Saved mapping for 3612010557

Directory number	Initial resource	Action	Follow-up resource	Start Point	Duration	Actions
Default	Global 10 - MoH_File1	Repeat		Random		Override
361-201-0557	Global 11 - MusicOnHold_File2	Repeat	Global 10 - MoH_File1	Start		Edit Delete

Directory number	Initial resource	Action	Follow-up resource	Start Point	Duration	Actions
361-201-0558	None	Repeat		Start		Add

1 of 5 mappings used

Note: If a line has been recently added to or moved within this organization, then it may take up to one business day for the change to affect Music On Hold.

View mappings in subdepartment: [D1](#) [D2](#) [D3](#)

You will now see a list of mappings between the directory numbers of lines in your Business Group or department and the Music On Hold resources that each line uses.

If the department you are an administrator of has one or more sub-departments, you will see links to these at the bottom of the screen.

- To manage resources for a line that is in a sub-department, click on the link for that sub-department.
- When you have followed the link to a sub-department, an additional link appears at the top of the screen, allowing you to move back up to the parent department.

There is always a default mapping, which is used if you don't specify a mapping for a particular line. This is shown first in the list with **Default** instead of a Directory number and applies to all directory numbers except for those with their own individual mappings in the list. The **mappings** screen also shows how many individual mappings you are allowed to create.

Each mapping consists of a series of fields which you can set:

- An *Initial resource*, or recording, which is played when the call is put on hold.
- Optionally a *Follow-up resource*, or recording, which may be played depending on the *Action*.
- An *Action*, which can be one of:
 - Repeat – The initial recording is played continually.
 - Play Once – The initial recording is played once, and then the follow-up recording is playing continually.
 - Repeat – Initial Interrupted – The initial recording should be interrupted at set intervals by the follow-up recording. This could be used to interrupt music with an announcement indicating that the user is in a queue.
 - Repeat – Follow-up Interrupted – The initial recording is played first. Then the follow-up recording plays continually being interrupted by the first recording.
- The *Start point* field indicates whether the recording will start at the beginning (the value *Start* indicates this) or whether it should start at a random point of the recording (the value *Random* indicates this).
- The *Duration* field which is used by the *Repeat – Initial Interrupted* and *Repeat – Follow-up Interrupted* actions to indicate how often the repeated recording should be interrupted.

In general, your Service Provider will configure a Default resource to be played as a single, repeating resource.

- If you are an administrator for the whole Business Group, you can override this mapping for the whole group and all its departments, to use a different resource or a combination of resources.

- If you are an administrator for a department within the group, you can override the default mapping for your department and any sub-departments.
- If you have not changed the default, it appears with an **Override** button to the right (instead of the **Edit** button shown for other mappings).

Adding a mapping

To add a mapping for a particular line, follow these steps:

1. Use the **Directory number**, **Initial resource**, **Action**, **Follow-up resource**, **Start Point**, and **Duration** drop-downs to set these fields (located to the left of the *Add* button).
2. Click on *Add*.

Modifying a mapping

To modify either the default mapping, or the mapping for a line, follow these steps:

1. To change the default mapping that was supplied by your Service Provider or inherited from a higher-level department, click the *Override* button to the right of the mapping.

- If you were overriding the default mapping, the *Override* button is now replaced by *Edit* and *Use Default* buttons.

To change any other existing mapping, including the default mapping if you have already overridden it, click *Edit* to the right of the mapping.

2. Modify the fields.
 - To revert to the existing default mapping that was supplied by your Service Provider for the whole Business Group, or the default mapping for your department if you are a department administrator, click the *Use Default* button.
3. Click on *Save*.

You cannot modify the telephone number that a mapping applies to. If you need to do this, remove the mapping and add a new one.

Removing a mapping

To remove a mapping click on the *Delete* button to the right of the mapping. You cannot delete the default mapping but you can override it, edit it, or revert to the original default that was inherited from Service Provider settings or from a higher-level department.

14.2 Phone access

Using this interface you can:

- Listen to the music or other recordings for the default mapping or the mapping you have configured for any of your lines.
- Listen to the Global Media Resources we have made available.
- Create, change or delete your own recordings.

14.2.1 Logging in

To access the telephone interface for Music On Hold, dial 555-555-5555 from your phone. To log in you need to enter:

1. Your telephone number.
2. Your Music On Hold password. You can view or change this by using CommPortal as described in Section 14.1.2.

14.2.2 Using the telephone interface

The telephone interface is menu driven with voice prompts, so listen to the prompts and then press the keys on your phone to select which option you would like.

For your convenience the top-level menus provided by the telephone interface are documented here:

- *. Press * at any time to go back to the previous menu.
- 1. Listen to resource for default mapping. This will play you the recording which is played to callers on hold for extensions which do not have their own mappings.
 - If you have logged in using an administrator line assigned to the top-level Business Group, you will hear the default mapping for the Business Group. If you have logged in as a department administrator, you will hear the default mapping for your department
- 2. Listen to resource for particular extension. This will play the recording which is played to callers on hold on a particular extension.
 - If you type a valid extension number, you will hear the resources that are mapped to this line, or the resources for the default mapping that it uses if it does not have its own explicit mapping. You will hear these resources in the same pattern as a caller would hear them.
- 3. Listen to global resources. This allows you to listen to the recordings in the Global Media List, described in Section 14.1.3. You will need the 2 digit resource ID of the recording you want to listen to.

4. Manage existing local resources. This allows you to modify or delete recordings you have added to the Music On Hold system, including recording a new resource to replace an existing one. You will need the 2 digit resource ID of the recording you want to modify or delete.
5. Record new local resource. This allows you to record a new resource over the phone.

A Glossary

This appendix describes the important concepts used in your phone system.

A.1 CommPortal

CommPortal provides a web interface to your phone system, and allows end users and Business Administrators to modify their settings. There are two CommPortal interfaces.

1. The first is for regular users to manage their business telephony settings.
2. The second is for Business Administrators to modify both global settings for the business and to modify end-users' settings.

The second of these interfaces is the one which you will use to administer the phone system and is described by this document. For more details on using the first interface, please see the *Metaswitch Networks Hosted PBX End User Guide*. You will see this interface if you log on to an individual line as administrator.

A.2 Logging into CommPortal as another user

You may at times need to log into CommPortal on behalf of another user. This will enable you to view and modify the user's settings just as that user can by using the regular CommPortal interface. Here are some examples of when this would come in useful.

- If a user has forgotten their password you can log on and change the password to a new value.
- If the user is unable to access CommPortal but needs a setting changed urgently, such as Call Forwarding, you can log on and do it for them.

There are a few differences between the regular CommPortal interface and what you will get to see when you log in as another user.

- The Dashboard page is not available so by default CommPortal takes you to the Call Manager page.
- The Voicemail page is not available for privacy reasons.

A.3 Phones

The *Hosted PBX* VoIP solution supports a number of different types of phone. These have different keys from each other and differ in their operation. For specific instructions on using the phones, please see the *Metaswitch Networks Hosted PBX End User Guide*.

A.4 Phone numbers

Every phone line within your business has its own DID (Direct Inward Dial) number, which is a regular 10 digit number including the area code, such as 555-555-5556. Within your business you are able to assign extension codes to these phone numbers. These are shorter numbers (typically 3 or 4 digits although they can be longer) which enable your employees to quickly call each other.

Your phone system is capable of having multiple lines configured on a single phone. You could configure one line on a phone which is that employee's personal DID, and another line which is your business's main switchboard number. Calls to both numbers will make this one phone ring.

Your phone system is also capable of sharing lines between phones. This means that in the example above, each phone in your business could have its own DID line, and a second line which is your business's main switchboard number. Then every phone would ring when a call came into your switchboard.

We will assign your business one or more blocks of numbers which you can then assign to phones as you wish. You can then define your own extension codes which map to these numbers. Alternatively, if you have asked us to, we will have pre-configured your system so that the phone numbers and extension codes are already assigned.

A.5 MAC addresses

Every phone has a unique identifier called a MAC address. The phone system uses this identifier to uniquely identify a phone.

This MAC address is printed on a sticker on the phone, usually underneath. It consists of 6 groups of 2 letters or numbers, and will be printed in one of two forms:

- FE:DC:BA:12:34:56
- FEDCBA123456

A.6 Departments

Many smaller businesses will only have a single administrator, or a number of administrators who all manage the entire phone system. However, if you work in a larger enterprise you may have different administrators each with responsibilities for the phones of different parts of your organization.

Therefore our *Hosted PBX* solution supports the concept of departments. Every phone line and phone is a member of a department. Departments are hierarchical, with some departments having sub-departments. An administrator of a department is permitted to manage all phones, lines and other resources within that department. They are also allowed to manage the sub-departments.

Even the smallest business will have at least one department in the phone system, known as the top-level or root department, and where there is only one department all of the phone lines and phones will be part of this.

Larger businesses will have multiple departments, and phones and lines can be moved around these departments to allow different administrators to manage them.

An administrator's phone line is always part of the department he is the administrator for. Moving the administrator's line to a different department will remove his permissions for managing the department he used to be in, and give him permissions to manage his new department.

A.7 Phone profiles

A department's phone profiles consist of default phone configuration which will be automatically applied to all phones within that department. There is a different profile for each type of phone within the department.

As an example, a department may deploy three types of phones:

- Polycom VVX 411
- Polycom VVX 411 with sidecar
- Polycom VVX 411 with sidecar

In this case the department will have up to three profiles – one for each type of phone.

A department inherits the phone profiles from any parent departments, so parent departments can specify some elements of a phone's configuration, and the sub-department can configure others.

A.7.1 Modifying Phone profiles

The Phone Profile Editor allows you to make a range of changes to these phone profiles.

You can configure the keys of the phone so that the phones used by people in your department will contain these settings by default. For example you can configure a key to access voicemail which will be configured on every phone of this model in your department.

You can also modify other configuration in a phone profile. .

- Lock settings so that neither end-users nor administrators in sub-departments can override settings.
- Hide settings so that neither end-users nor administrators in sub-departments can view settings.
- Configure ringtones.
- Configure the phone display.
- Configure the time and date format, and time zone.

Note: the exact options available to you will depend on your phone model and the level of phone service you have subscribed to. In some cases there may be more advanced features available to you.

Making changes to your phone configuration is described in Chapter 4.

A.7.2 Copying phone configuration

If you need to replace a user's phone for them, because the old one breaks, you may have to copy the configuration of the old phone to the new phone. This is described in section **Error! Reference source not found.**

Note: Copying phone settings is only supported if you are replacing the old phone with a new phone of exactly the same model. If you are upgrading the phone, you or the user will need to manually apply any settings to the new phone.

A.8 Network

The phones for your *Hosted PBX* use an Ethernet-based network to communicate with our systems. This is the same technology that provides computers with access to a network. These phones are also powered via Ethernet so if you have a compatible Ethernet switch there is no need for separate power connections to the phones.

Most of the phone models can also provide network access to the computers at users' desks. This means only a single network connection needs to be run to each desk.

As your telephone calls travel over an IP network the quality of the network in your offices is very important. Normally we or one of our partners will either supply and install your network, or verify that your network is suitable for Hosted VoIP.

However, it's very important that you only connect the right type of network device to the right network connection. If you connect the wrong type of equipment to your network then it may reduce the quality of your telephone calls, or even stop your telephone system working altogether. We will tell you when we install or verify your network which connections can be used for what.

A.9 Sim-Ring Groups (Multiple Appearance Directory Numbers MADNs)

From V7.4 onwards, MLHGs are enhanced to provide the same function as MADNs by providing a 'ring all' distribution algorithm. MADNs will continue to work as in previous versions. However, for new configuration, you should use MLHGs instead. For more information on MLHGs, see section A.10.

A Multiple Appearance Directory Number (MADN) is a telephone number with no phone or line associated with it. Instead the MADN is configured to have a number of MADN members, each of which is a number with a line associated with it. Whenever a call comes in to the MADN all of the lines whose directory numbers are MADN members will be rung. When any of these phones is answered the rest of the phones will stop ringing.

A line may be a member of one more than one MADN. In this case it rings when a call comes in to any of the MADNs that the line is a member of.

MADNs can also be configured to enable queuing. If configured, calls which come in to a MADN whose members are all busy will be queued. These queued calls will receive Music On Hold if you have subscribed to this feature.

You can configure to allow calls direct to a MADN member's directory number (rather than to the MADN itself). If permitted, these calls bypass the MADN and use the called number's services. Similarly, calls made from the MADN member's phone use the line's caller ID and call services rather than those of the MADN, although you can configure the calling party number on these lines to match the MADN number if required.

A.10 Multi Line Hunt Groups (MLHGs)

A Multi Line Hunt Group allows sequential ringing of available phones for use in applications such as call centers. An MLHG consists of a number of lines within the business group, known as members. When a call comes into the hunt group, a hunt algorithm will decide which phone to ring. If this phone is busy or is not answered the hunt algorithm will move on to another phone.

- Hunt groups have a pilot number, which is a directory number associated with the MLHG. When this pilot number is called the members of the MLHG are alerted in turn.
- Alternatively, a hunt group can be configured to hunt if any member of the hunt group is called directly using its DID number and doesn't answer.

There are various distribution algorithms available:

- Linear – hunting starts at the first configured line and goes sequentially through the members in the list in the order they were configured.
- Circular – hunting starts at the line which has been called, and then goes through as in the linear case.
- Uniform – hunting starts at the first line after the line which was called the last time this MLHG was called.
- Most idle – hunting starts at the line which has been idle for the longest period of time. After this it tries the line which has been idle the next longest period, etc.
- Ring all – all free MLHG members ring simultaneously until one member answers the call.

MLHGs can also be configured to enable queuing. If configured, calls which come in to an MLHG whose members are all busy will be queued. These queued calls will receive Music On Hold if this feature is configured. You can also offer callers the option to press 0 to exit the queue and have their call diverted to voicemail or forwarded to another number.

If you have Integrated ACD that allows you to view and download statistics for activity in your MLHGs from the main MLHG page and generate reports, the interface will use slightly different terminology within the Integrated ACD UI.

- A Queue refers to a MLHG.
- An Agent refers to a member of a MLHG.

A.11 Call Pickup Groups

Group Call Pickup allows users to pick up calls that are ringing on other phones (in a pre-defined pickup group within the same business group by picking up their own phones and dialing an access code). Note that if two or more phones within the pickup group are ringing at the same time, the user cannot control which call is picked up.

You can have multiple groups in your business. A line can be in multiple Call Pickup Groups. If a call is ringing on lines in both groups simultaneously and the user who is in both groups picks up a call, then they will pick up the call which started ringing first.

Directed Call Pickup is similar, but allows the user to pick up the call that is ringing on a specific phone within the group. Users pick up their own phones, and dial an access code followed by the extension code for the line which is ringing.

A.12 Short Codes

Short codes are speed dials that are defined at the scope of your organization – so everyone in your business can use these speed dials.

A.13 Extensions

Extensions are the codes you can dial to reach other people in your business.

A.14 Account codes

Account codes:

- authorize employees to make outbound phone calls
- associate a reference number to outgoing phone calls that your business makes.

Once you have dialed a number that requires an account code you will hear a tone. This is the prompt to enter the account code. Once the account code has been correctly entered the call will be made.

There are two types of account codes.

1. Validated Account Codes. When the user making a phone call enters the account code it is checked against a list of valid account codes. If the account code matches one on the list the call will continue. If the account code doesn't match any on the list then an error is played.

You should use Validated Account Codes when you want to stop any unauthorized personnel from making outbound calls.

2. Unvalidated Account Codes. When the user making a phone call enters the account code this account code is marked against the call in our billing system and the call continues. The account code isn't checked for validity.

You can use Unvalidated Account Codes where you want to be able to record an account code against outgoing calls that you make. If you have signed up to the service with us then when we provide you with your phone bill the account code for each call will be marked on your bill. This is useful, for example, if you are billing your clients for all of your phone calls.

You can set up either type of account code either for your whole business, or select from either validated and unvalidated for each line individually. You can allow your users to manage their account codes.

A.15 Auto Attendant – Easy Attendant / Premium Attendant

MetaSphere provides two solutions for Auto Attendant functionality. Easy Attendant offers a very simple automated telephone menu. Callers to a business are directed to the automated TUI, providing key options to transfer to specific departments or individuals in the business, to transfer to a voicemail account directly, or to listen to a recorded announcement. You can choose either to have a single menu that plays when Easy Attendant is turned on, or two different menus for business and non-business hours that are used according to a pre-defined schedule. When Easy Attendant is turned off, you can either forward callers to another telephone number or play a message informing the caller that your business is currently closed.

Premium Attendant, aimed at small and medium business subscribers, offers an increased level of service compared to Easy Attendant. In addition to all the features offered by Easy Attendant, Premium Attendant allows multiple menus with a finer scheduling control. It also includes more call handling options, such as Voicemail by Name and Voicemail by Extension, as well as greater control over the actions taken for any given key press.

A.16 Music On Hold

The Music On Hold system lets you configure music and recordings to be played to your callers when you put them on hold. You can either use recordings we have made available, or upload and make your own recordings.

You can access the Music On Hold system either using CommPortal, or using your telephone. The CommPortal interface is more powerful and easier to use, but you can use the telephone interface to record your own announcements to be played to callers.

A.16.1 Music On Hold performing rights

Playing music to callers on hold may constitute "public performance" of the music and therefore risks infringing the copyrights of composers or artists. Therefore you may need to obtain appropriate licenses to play any material that you plan to use as Music On Hold.

You can obtain these licenses from licensors such as Broadcast Music Inc (<http://www.bmi.com/>) and the American Society of Composers, Authors and Publishers (<http://www.ascap.com/>).

We do not accept any legal liability arising from copyright infringements associated with your use of Music On Hold, except where you use the Global Media Resources described in Section 14.1.3.