



Hosted VoIP Phone System

Green Platform

CommPortal Administrator Guide

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1. Introduction

This manual describes the Administrator CommPortal, an interface that allows the business group administrator to manage the features of their phone system via a website.

1.1. About this Manual

The *Administrator CommPortal Guide* assists business group administrators in understanding and managing the Telesystem hosted phone system. This guide is divided into subsections, as is the portal itself. You may find that it is best to keep this guide in its electronic form to search desired topics in an easier manner.

The things you can do via the administrator portal include, but are not limited to:

- Making changes to line names and details associated with user accounts (see section 3.1)
- Rerouting calls (call forwarding) in case of emergency or business changes (see section 3.1.1.1)
- Programming available keys on users' phones (see section 3.4)
- Modifying auto attendants (see section 5)

The companion to this *Administrator CommPortal Guide* is the *Personal CommPortal Guide* which explains the personal level of access some users have to their own account. That companion guide will assist you in answering questions from users and gain a better understanding of their access. Please contact Telesystem for this guide or download it in the Green Platform section at <https://www.telesystem.us/hosted-voip-green>.

Please note that the features described in this document may vary from those available based on the type of service on your account and level of access you have to the system. The features shown demonstrate both standard and premium level features. The layout and availability of features to which you have access may vary based on the services deployed to your site. If at any time you would like to expand the capability of your account, please contact Telesystem for assistance.

1.2. Logging In

To access the CommPortal, point any browser to <https://pbx.telesystem.us/commportal/bg> then enter your administrator credentials.

Number is the ten digit account number assigned to your own phone account (known as the DID or direct inward dial number).

Password is your CommPortal password which will be given to you by Telesystem.

If after entering your correct direct dial number and password you cannot gain access, this may mean that you do not yet have administrator rights enabled on your account. If you do not know your password or have an issue logging into the portal, please contact your current system administrator or Telesystem to assist.

A screenshot of the CommPortal Web login interface. At the top, it says "CommPortal Web" in blue, followed by "Please log in below." in blue. There are two input fields: "Number:" with the value "6105551234" and "Password:" with a masked password "*****". A blue "Login" button is to the right of the password field. At the bottom, a note says "If you have forgotten your password, please contact customer support."

1.3. Logging Out

You will be logged out of the portal in any of the following situations:

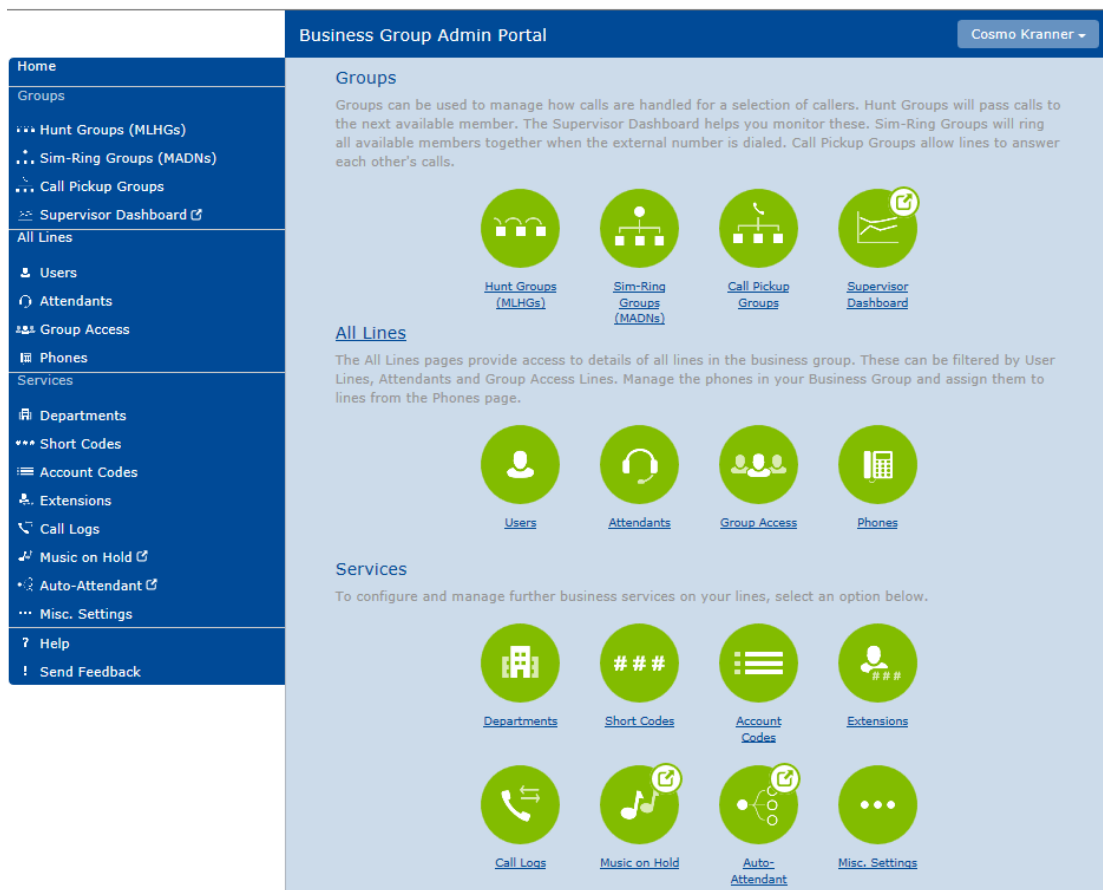
- After a period of inactivity
- Closing the browser
- Manually logging out within the portal

To manually log out of the portal, click on your name on the top right then click **Logout**.




1.4. Home Page

A business group administrator will initially see the portal home page when logging into the Administrator CommPortal:

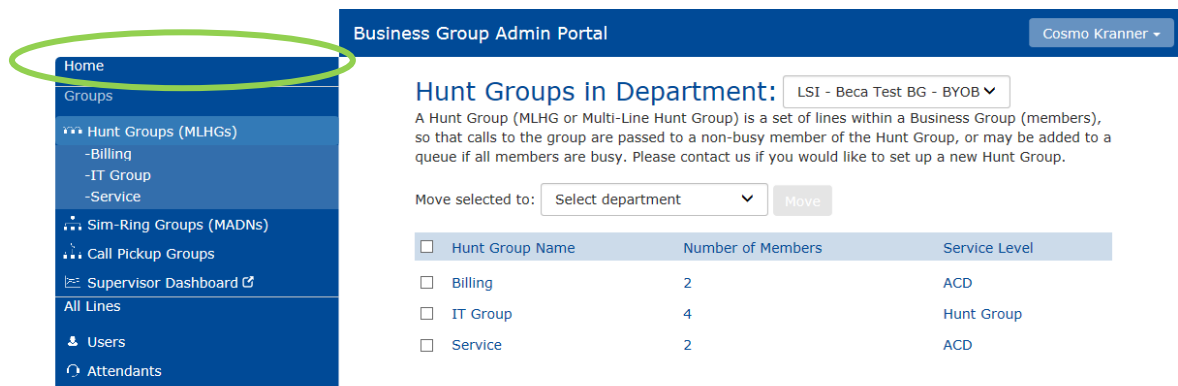


The home page displays icons of all the services available in the business group and clickable section links stacked on the left pane. Use either to navigate to the associated section.

Icons and links that include a  symbol will open an additional tab or window. For example, the **Supervisor Dashboard** link opens the Integrated ACD Dashboard on a separate tab within the browser.

Additionally, the bottom of the left-hand sidebar also includes a **Help** link. Click on this link to see information about the options on the page you are currently viewing.

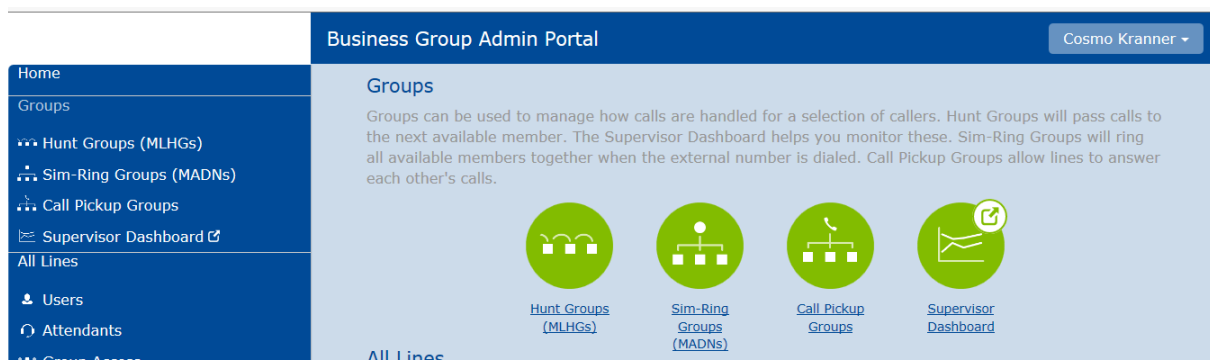
While viewing other sections, you may navigate back to the home page by clicking the *Home* link on the top left of the screen.



2. Groups

The business group administrator has access to see and manage all groups in their department or business group. Groups may include Hunt Groups (MLHG), Sim-Ring Groups (MADNs), and Call Pickup Groups.

Additionally, if the administrator is also a supervisor of an integrated ACD call center, they will have access to the Supervisor Dashboard in the Groups section as well.



To view groups, use the Home Page links as shown above or click on the Group links in the left pane.


2.1. Hunt Groups (MLHGs)

A hunt group (also known as *MLHG* or *Multi Line Hunt Group*) is a phone number that may be built on your account to serve as a ring group.

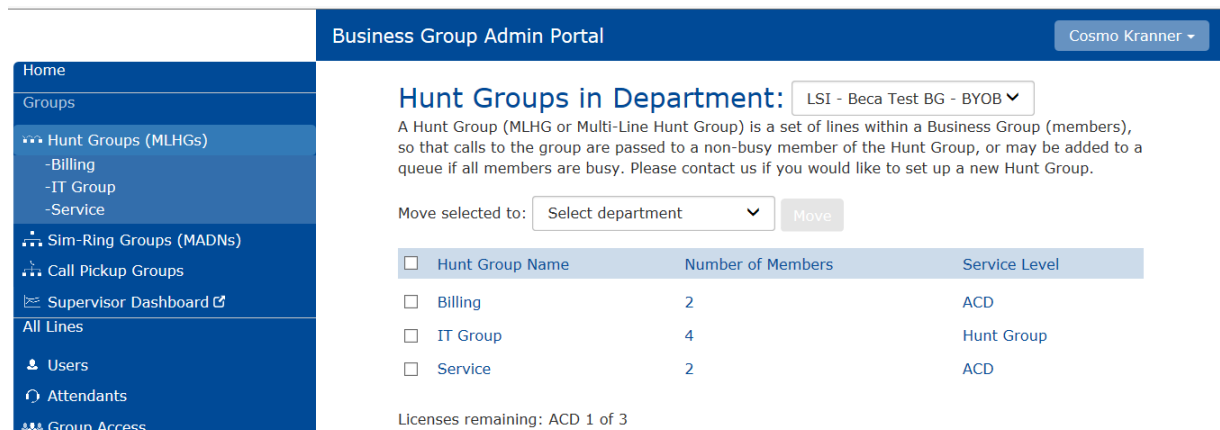
To view the hunt groups, do one of the following:

- Select the home page Hunt Groups icon



- Select Hunt Groups (MLHGs) section in the left pane  Hunt Groups (MLHGs)

This will launch the Hunt Group section:



Business Group Admin Portal Cosmo Kranner

Hunt Groups in Department: LSI - Beca Test BG - BYOB

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:

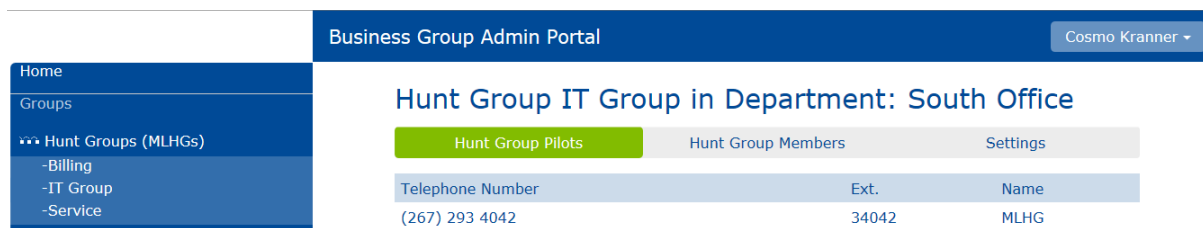
<input type="checkbox"/>	Hunt Group Name	Number of Members	Service Level
<input type="checkbox"/>	Billing	2	ACD
<input type="checkbox"/>	IT Group	4	Hunt Group
<input type="checkbox"/>	Service	2	ACD

Licenses remaining: ACD 1 of 3

The Hunt group screen shows:

- **All hunt groups** in the department that is selected from the department drop down menu
- The **name** of each hunt group
- The **number** of hunt group members within each group
- The **service level** which indicates whether the hunt group is part of the premium ACD service.
- If there is a limit on the number of ACD (call center) licenses which can be used for agents, this will also be noted at the bottom of the screen.

Click the hunt group name, members, or service level to access the configuration for the group.



Business Group Admin Portal Cosmo Kranner

Hunt Group IT Group in Department: South Office

Hunt Group Pilots Hunt Group Members Settings

Telephone Number	Ext.	Name
(267) 293 4042	34042	MLHG

The hunt group configuration section includes three tabbed sections. Each is accessed by clicking on its title:

- **MLHG Pilots**- Make changes in this section to how long the hunt group rings and where the hunt group forwards if there is no answer.
- **MLHG Lines**- This section allows the administrator to modify and view lines (agents) that are assigned to that particular MLHG.
- **Settings**- This section allows the administrator to modify and view settings pertaining to this MLHG including the name, ring algorithm used, any log in/out allowance.

2.1.1 Hunt Group Pilot: Overview

Click the Hunt Group Pilot heading to view that section. This is the default section after selecting a hunt group.

A *pilot number* is a phone number that may be called directly to call into the hunt group. If the hunt group has been assigned an extension, it will also show in this section.



Click the hunt group number to make changes to its settings. The primary changes to make to a hunt group here include:

- Change the call manager settings. This includes how long the call rings the group and/or where it forwards if unanswered or busy.
- Modify the way voicemail is received on the hunt group.
- Allow/disallow callers to press 0 to exit the queue.

2.1.1.1 Hunt Group Pilot: Call Manager Settings

Modify the forwarding settings of the hunt group in its Call Manager section.

To modify hunt group settings:

- Select **Groups**
- Select **Hunt Groups**
- Click the hunt group you want to configure
- Select **Hunt Group Pilots** section
- Click the hunt group you want to configure
- Click **Go to Call Manager** [Go to Call Manager](#)
- Click **Forwarding** tab
- **Modify** settings as desired in the forwarding section then click **Apply**

The most common forwarding on hunt groups is **Busy/No Answer Forwarding** (see below). This forwards the incoming call if the hunt group members are all busy or if none of them answer the ringing call. For example, calls to the billing department may overflow (forward) to the auto attendant or another extension if they are unanswered.

To modify the busy or no answer forwarding destination, use the instructions above then click on **Busy/No Answer** and modify the no answer and busy destinations as shown below. The busy/no answer destination can be a telephone number or valid extension.

The example above shows that if the calls are unanswered, they are forwarded to extension 1003 after 36 seconds (about 6 rings). If the members are busy, the call is forwarded to extension 1003.

2.1.1.2 Hunt Group Pilot: Queue Settings

Modify the queue settings of the hunt group as follows:

- Select **Groups**
- Select **Hunt Groups**
- Click the hunt group you want to configure
- Select **Hunt Group Pilots** section
- Click the hunt group you want to configure



- Click **Queue**
- Modify the following as needed:

- *Exit from queue*- check this if you want callers to be able to press 0 to exit the queue while they are waiting. If it is checked, you must choose to send the call to voicemail on the hunt group or another destination. The example to the right shows that callers may press 0 to exit the queue. When they do, they will be transferred to extension 1002.

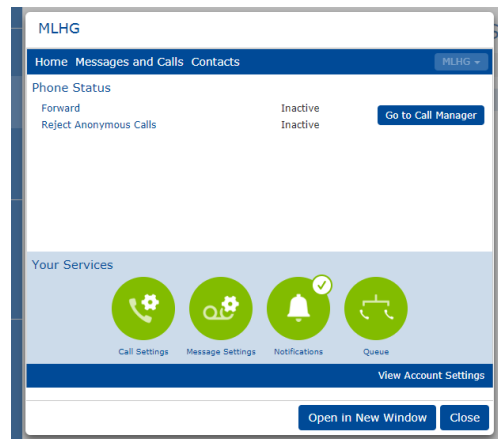
- *Present pilot name with the number in Caller ID*- specifies whether or not the directory number that was called should be delivered as the caller ID when the agent receives a call. This can be used so that, for example, a helpdesk receiving calls could know whether the "Helpdesk" or "Accounts Inquiries" number had been called.

- Click **Apply** to save changes

2.1.1.3 Hunt Group Pilot: Other Settings

There are other modifications that can be made to the hunt group's individual settings. Many hunt group settings are similar to those of any other line.

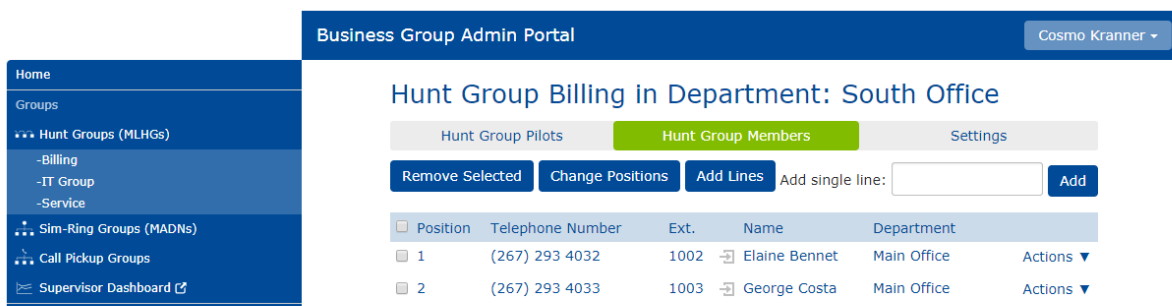
See section 3 for more information on modifying individual line settings such as message settings, call settings, etc.



2.1.2 Hunt Group Members: Overview


Click the *Hunt Group Members* heading to view that section.

Members are the lines within the hunt group that ring when called. This section shows the members allocated to the hunt group and whether or not they are currently logged in.




The options at the top of this section allow the administrator to add, remove, or modify the lines in the hunt group.

To remove a line from the group:


- Click the checkmark  to the left of the line you want to remove
- Click **Remove Selected** button

To modify the order of the members:

- Click **Change Positions** button
- Use the  and icons to modify the member positions
- Click **Apply** button

The order of the members is only relevant if the hunt group is using a linear or circular call distribution method. See section 2.1.3.2 for more information on the call distribution options.

To add another member to the group using the Add Lines menu:

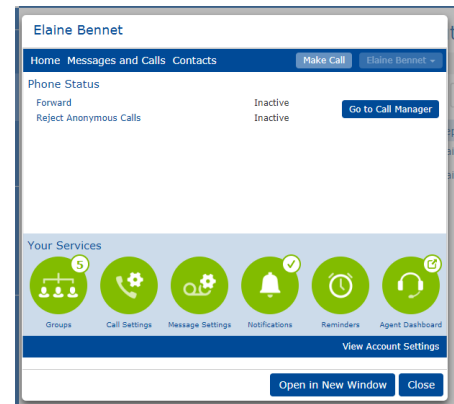
- Click **Add Lines** button
- In the screen that appears, filter to the correct department (if needed), then place  checkmarks by the lines to add to the hunt group.
- Click **Add Selected** button

To add another member to the group using the single line menu:

- Enter an extension or phone number of a user in the *Add single line:* text box
Add single line:
- Click **Add** button



2.1.2.1 Hunt Group Members: Individual Line Settings

The administrator can access each member's individual settings directly from the hunt group itself. To do this while viewing the hunt group, click on the phone number or use the *Actions- View Line Settings* option to the right of the line. The administrator may make all the primary line changes to the lines here. For more information on the modifications here, see section 3.



2.1.2.2 Hunt Group Members: Member Log in and Log Out

The administrator can allow hunt group members to log in and out of the group. The status is noted in the member screen as follows:

-  Logged in member
-  Logged out member

When a line is logged out, the member will not receive calls sent to the hunt group. You may allow to disallow users to log themselves in and out on an individual basis as shown below.

The enable or disable the ability to log in/log out for a specific member:

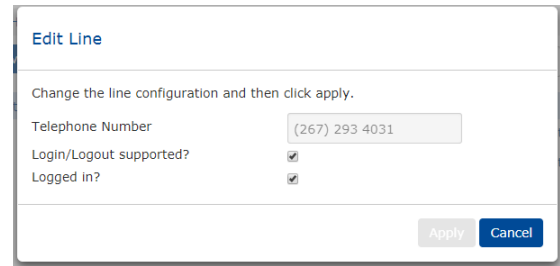
- Click **Actions** by the line to modify
- Select **Edit line** from the drop down menu
- Add (enable) or remove (disable) a **checkmark** by *Login/Logout supported*

If the administrator has allowed users to log in and out, they may do so through their User CommPortal Groups section or Agent Dashboard (see section 3.1.1.3). In some cases, their desk phone may also allow them to log in or out.

Alternately, administrators may log members in or out of the hunt group as shown below.

To log a member in or out of a hunt group:

- Click **Actions** by the line to modify
- Select **Edit line** from the drop down menu
- Add (logged in) or remove (logged out) a **checkmark** by *Logged In*



Administrators may also allow entire hunt groups the ability to log in and out, rather than choosing on an individual basis. To view or modify this (whole) hunt group setting, see section 2.1.3.1.

2.1.3 Hunt Group Settings: Overview

Click the *Hunt Group Settings* heading to view that section.

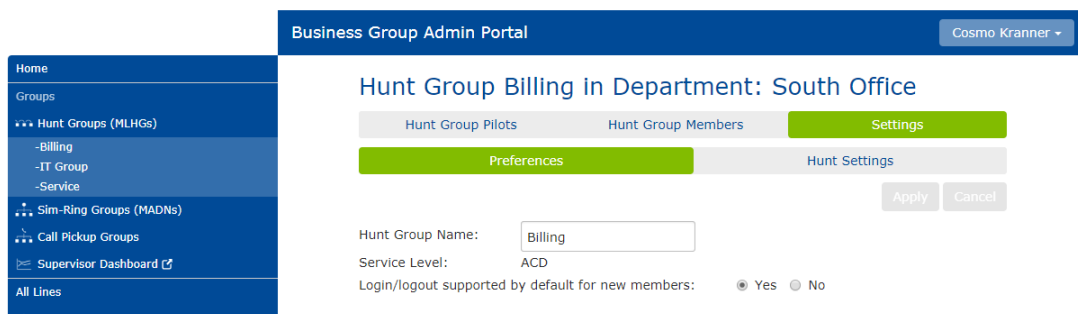
The *Settings* within this section include:

- **Preferences** –change the name and overall login/out decisions for the group
- **Hunt Settings**- modify the distribution algorithm, how long members are called, etc.

2.1.3.1 Hunt Group Settings: Preferences

The *Preferences* section of the hunt group settings includes the following:

- **Hunt Group Name:** Input the desired name of this hunt group.
- **Service Level:** This field notes whether this is a regular hunt group or an integrated ACD hunt group. This field may not be changed by the system administrator.
- **Login/Logout supported by default for new members:** As members are added and removed from hunt groups, you can allow or disallow them the ability to log in or out themselves. This setting can be decided for all new members here or modified per member in the members section (see section 2.1.2.2).



2.1.3.2 Hunt Group Settings: Hunt Settings

The *Hunt Settings* section of the settings includes additional settings for the hunt group.

Business Group Admin Portal Cosmo Kranner

Hunt Group Billing in Department: South Office

Hunt Group Pilots Hunt Group Members **Settings**

Preferences **Hunt Settings** Apply Cancel

This page shows the settings for the Multi Line Hunt Group. Hunting is applied to all calls to pilot numbers. Hunting is optionally applied to direct-dialed calls to busy Hunt Group members.

Settings	Value
Call Distribution Algorithm	Uniform (Longest idle) ▼
Is line hunting applied to direct-dialed calls?	<input type="checkbox"/>
Is the Pilot's information delivered as the Caller ID?	<input type="checkbox"/>
Ring each member for (secs)	<input type="text" value="30"/>
If a member does not answer, do not call again for (secs)	<input type="text" value="30"/>

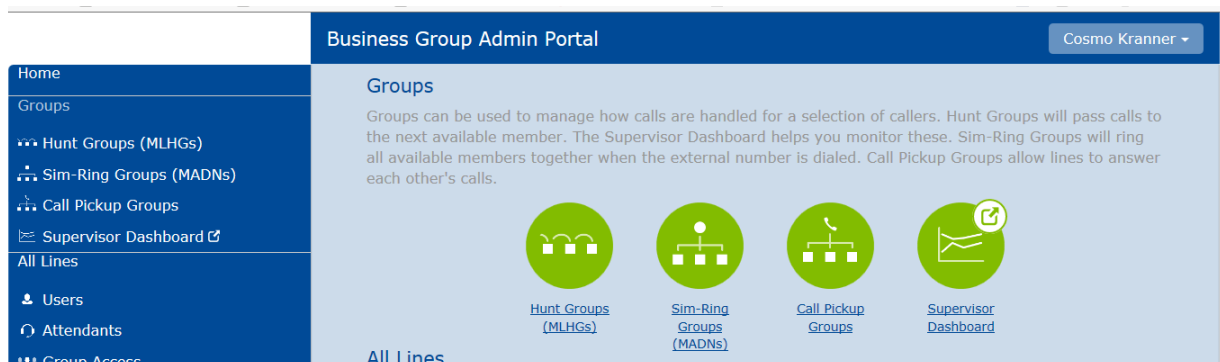
- **Call Distribution Algorithm:**
 - *Linear*- When the hunt group is called, hunting starts with the first MLHG Line and continues through the list until a non-busy line is found. If a busy MLHG Line is dialed directly and the *Hunt on Direct Dialed Calls* option is set to true, hunting starts with the MLHG Line after the dialed number and continues to the end of the list until a non-busy line is found. It does not start again from the beginning of the list.
 - *Circular*- When the hunt group is called, this is the same as Linear. If a busy MLHG Line is called, this is the same as Linear except that once the end of the list is reached, hunting will continue from the beginning of the list until a non-busy line is found.
 - *Uniform (round robin)*- When the hunt group is called, hunting starts with the first number after the line that was selected by the previous hunt. When the end of the list is reached, hunting continues from the beginning of the list until it reaches the number it started with. If a busy MLHG Line is dialed directly, and *Hunt on Direct Dialed Calls* is set to true, this is the same as Circular hunting.
 - *Uniform (longest idle)*- When the hunt group is called, hunting starts with the MLHG Line that has been idle for the longest. The idle time for a Line is calculated using the end time of any incoming or outgoing calls to or from the Line, not just those allocated by hunting. When an MLHG Line disables the Do Not Disturb call service, its idle time is reset to zero. This is the most commonly used call center algorithm.
 - *Ring All*- When the hunt group is called, all members ring simultaneously. If a member is logged out or unavailable, they will not ring.
- **Is line hunting applied to direct-dialed calls?** Specifies whether external calls directly to a line within the Multi Line Hunt Group receive Line Hunting treatment if the line is busy. (Intercom calls, and external calls directly to a line with SIP Call Forking enabled, do not receive Line Hunting treatment regardless of the setting of this field.)
- **Is the called number delivered as the Caller ID?** Specifies whether the directory number that was called should be delivered as the caller ID. This can be used so that, for example, a helpdesk receiving calls could know whether the "Helpdesk" or "Accounts Inquiries" number had been called.
- **Ring each member for:** Specifies the number of seconds a call will be presented to a member. There are approximately 6 seconds per ring.

- **If a member does not answer, do not call again for:** If a member does not answer a call this hunt presents to them, the hunt group will not present another call to the member for this number of seconds. There are approximately 6 seconds per ring.

If any changes are made, be sure to click **Apply**.

2.2. Sim-Ring Groups (MADNs)

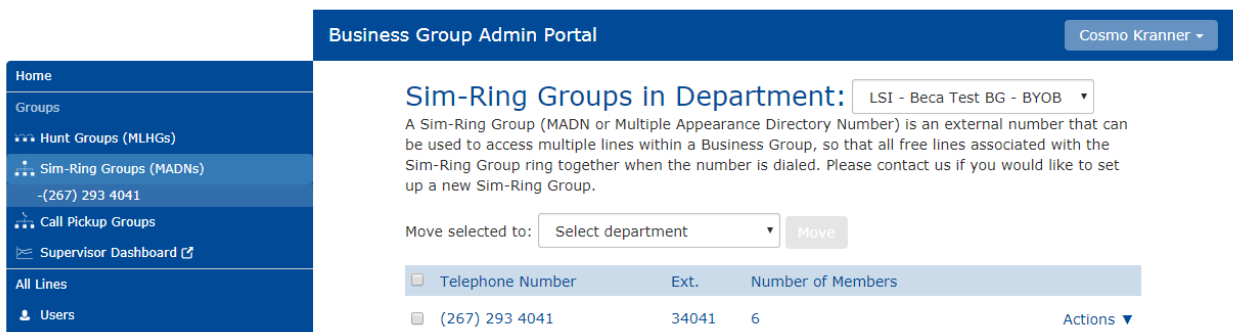
A simultaneously ringing (Sim-Ring) group is known as a multi appearance directory number (MADN). It is a phone number that built on your account that can ring several phones simultaneously. These groups are very similar to the Multi Line Hunt Groups in section 2.1, however the calls will always be distributed simultaneously to this group.



To view the Sim-Ring Groups, do one of the following:


- Select the home page Sim-Ring Groups icon 
- Select Sim-Ring Groups (MADNs) section in the left pane 

This will launch the Sim-Ring Groups section:




The primary sim-ring group screen shows:

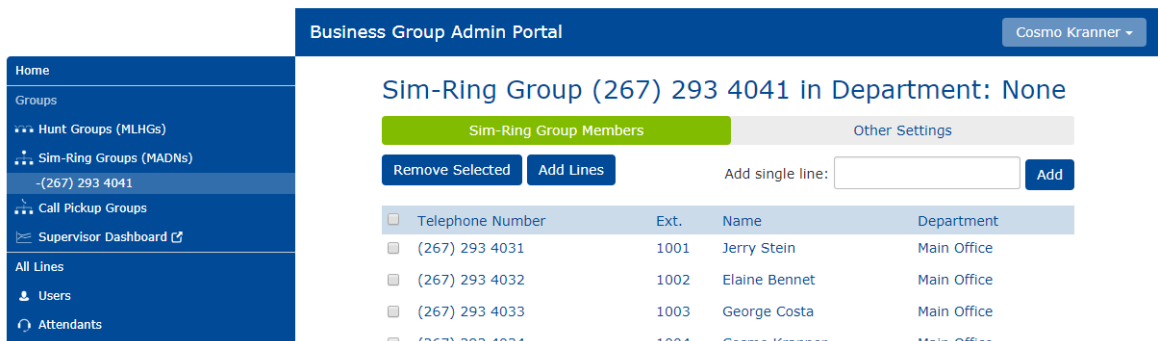
- **All sim-ring groups** in the department that is selected from the department drop down menu
- The **telephone number and extension** of the sim-ring group
- The number of **members** within each group

To make any changes to the sim-ring group, click on the  drop down menu to view and modify its group or individual settings.

2.2.1 Sim Ring Group: Group Settings

Group Settings allow administrators to add and remove users from the Sim-Ring group.

To access Group Settings, click on the  drop down menu then choose **group settings**. The screen that appears shows all group members. *Members* are the lines within the sim-ring group that ring when called.



Business Group Admin Portal Cosmo Kranner ▾

Sim-Ring Group (267) 293 4041 in Department: None


Sim-Ring Group Members Other Settings

Remove Selected Add Lines Add single line: Add


<input type="checkbox"/>	Telephone Number	Ext.	Name	Department
<input type="checkbox"/>	(267) 293 4031	1001	Jerry Stein	Main Office
<input type="checkbox"/>	(267) 293 4032	1002	Elaine Bennet	Main Office
<input type="checkbox"/>	(267) 293 4033	1003	George Costa	Main Office
<input type="checkbox"/>	(267) 293 4034	1004	Cosmo Kranner	Main Office

The options at the top of this section allow the administrator to add, remove, or modify the lines in the group.

To remove a line from the group:

- Click the checkmark  to the left of the line you want to remove
- Click Add Lines button

To add another member to the group using the Add Lines menu:

- Click Add Lines button
- In the screen that appears, filter to the correct department (if needed), then place  checkmarks by the lines to add to the hunt group.
- Click Add Selected button

To add another member to the group using the single line menu:

- Enter an extension or phone number of a user in the *Add single line*: text box
Add single line:
- Click Add button

The administrator may also modify the specific user's line information by clicking on the user's name and proceeding to modify their settings. For more information on modifying user settings, see section 3.

2.2.2 Sim Ring Group: Line Settings

Line Settings allow administrators to make changes to the forwarding of the group.

Modify the forwarding settings of the hunt group in its Call Manager. To access this:

- Select **Groups**
- Select **Sim-Ring Groups**
- Click **Actions**
- Select **View Line Settings**
- Click **Go to Call Manager** [Go to Call Manager](#)
- Click **Forwarding** tab
- **Modify** settings as desired in the forwarding section then click **Apply**

The most common forwarding on groups is **Busy/No Answer Forwarding** (see below). This forwards the incoming call if the group members are all busy or if none of them answer the ringing call. For example, calls to the billing department may overflow (forward) to the auto attendant or another extension if they are unanswered.

To modify the busy or no answer forwarding destination, use the instructions above then click on Busy/No Answer and modify the no answer and busy destinations as shown below. The busy/no answer destination can be a telephone number or valid extension.

The screenshot shows the 'Phone Status' settings for a line with number (267) 293 4041. The 'Forwarding' tab is selected. Under the 'Busy/No Answer' section, the 'Forward calls when no answer' checkbox is checked, and the destination is set to 5552352355. Under the 'Forward calls when busy' section, the 'Forward calls if your line is busy' checkbox is checked, and the destination is set to 1003. Both sections include a hint to use the 'Forwarding Destinations' tab for frequently used numbers. At the bottom, there are buttons for 'Open in New Window' and 'Close'.

The example above shows that if the calls are unanswered, they are forwarded to 555-235-2355, but if the members are busy, the call is forwarded to extension 1003. To modify *how long* the call rings before it overflows to an alternate location or voicemail picks up, make that change in the line's Message Settings (see section 3.1.1.3.3).

Other types of forwarding are available in the call manager section. See section 3.1.1.1 for more details on alternate forwarding types and forwarding destinations.

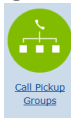
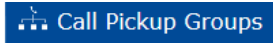
2.3 Call Pickup Groups

Call pickup groups may be used for groups of users that answer each other's calls when they hear another group member's phone ring.

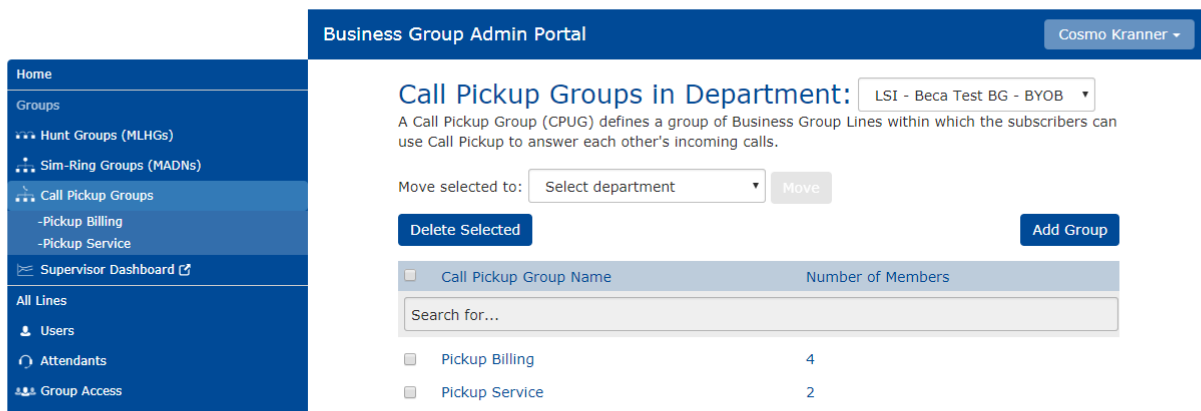
For example, if someone sits close to a receptionist and would like to answer the incoming calls while she is out to lunch, a pickup group would be configured that includes the receptionist extension as well as any users that want to answer those calls. Users in the group can answer each other's calls upon hearing the other member's phone ring.

Users can answer these calls by dialing *11 or by using a *Group Pickup* button (see section 3.4.4) on their phone. This command will retrieve the first call that has come into the pickup group. Please note that when using this feature, only the originating caller ID number will be delivered.

To manage Call Pickup Groups, do one of the following:

- Select the home page Call Pickup Groups icon 
- Select Call Pickup Groups section in the left pane 

The Call Pickup Group page lists all the call pickup groups in the selected department (not including those in sub-departments).




The screenshot shows the 'Business Group Admin Portal' interface. On the left is a navigation menu with options like Home, Groups, Hunt Groups (MLHGs), Sim-Ring Groups (MADNs), Call Pickup Groups (selected), Pickup Billing, Pickup Service, Supervisor Dashboard, All Lines, Users, Attendants, and Group Access. The main content area is titled 'Call Pickup Groups in Department:' with a dropdown menu set to 'LSI - Beca Test BG - BYOB'. Below this is a description of a Call Pickup Group (CPUG). There are buttons for 'Delete Selected' and 'Add Group'. A table lists the groups:

Call Pickup Group Name	Number of Members
Pickup Billing	4
Pickup Service	2

2.3.1 Managing Call Pickup Groups

The call pickup group section allows the administrator to add, remove, and modify call pickup groups in their organization.

To remove a call pickup group:

- Click the **Call Pickup Groups** section
- **Select** the call pickup group using the  box to the left of the group name
- Click the **Delete Selected** button

To create a new pickup group:

- Click the **Call Pickup Groups** section

- Click the **Add Group** button
- **Enter** the name of the new group in the text box
- Click **Add**

To add members of the pickup group:

- Click the **Call Pickup Groups** section
- Click the **name** of the pickup group to configure
- Click the **Add Lines** button and follow the prompts to add a line OR enter the extension in the *Add single line* field.

Members		Settings	
<input type="button" value="Remove Selected"/> <input type="button" value="Add Lines"/>		Add single line: <input type="text"/> <input type="button" value="Add"/>	
<input type="checkbox"/> Telephone Number	Ext.	Name	Department
<input type="checkbox"/> (267) 293 4031	1001	Jerry Stein	Main Office
<input type="checkbox"/> (267) 293 4032	1002	Elaine Bennet	Main Office
<input type="checkbox"/> (267) 293 4033	1003	George Costa	Main Office
<input type="checkbox"/> (267) 293 4034	1004	Cosmo Kranner	Main Office

To remove a line from the Call Pickup Group:

- Click the **Call Pickup Groups** section
- Click the **name** of the pickup group to configure
- **Select** the line to remove by using the ☒ box to the left of the line
- Click the **Remove Selected** button

To change the name of a Pickup Group:

- Click the **Call Pickup Groups** section
- Click the **name** of the pickup group to configure
- Click the **Settings** header
- Input a new name then click **Apply**

Members	Settings
<input type="button" value="Apply"/> <input type="button" value="Cancel"/>	
Group Name	
Call Pickup Group Name: <input type="text" value="Pickup Team 1"/>	

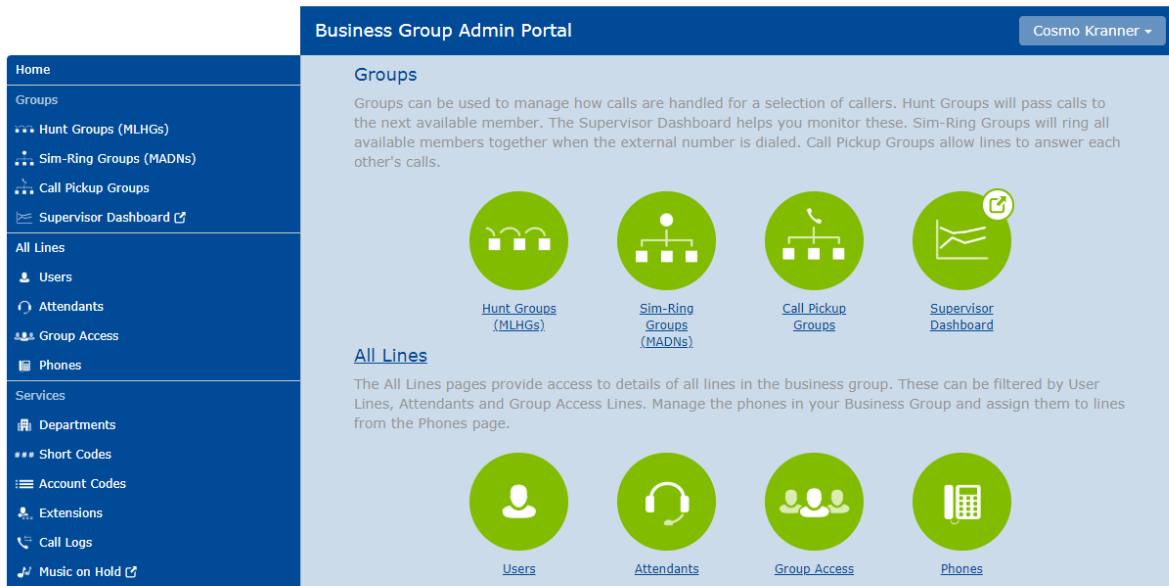
2.4 Supervisor Dashboard

If the administrator is also an integrated ACD (call center) supervisor, a Supervisor Dashboard link will also appear in the Group section. This is the gateway to viewing the current health of the call center, running reports, and other supervisory duties.

Please see the associated *Integrated ACD Supervisor Guide* for more information.

3. All Lines

The **Lines** section gives the administrator access to view and make changes to each of the phone numbers and phones on the account. This view displays all the lines in the selected department and may use icons to indicate the line type.

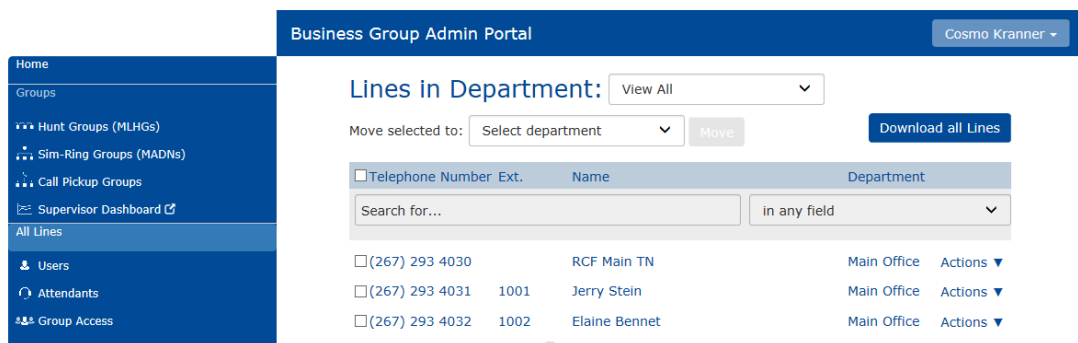


To view lines, use the Home Page links as shown above or click on the *All Lines* link or subsections in the left pane.

- **Users** screen displays all individual Business Group lines.
- **Attendants** screen displays any lines configured with Premium Attendant services.
- **Group Access** screen displays any Sim-Ring or Hunt Group lines as discussed in section 2.
- **Phones** gives access to modify any phone sets included in your business group.

In the primary **All Lines** view, the administrator can do the following:

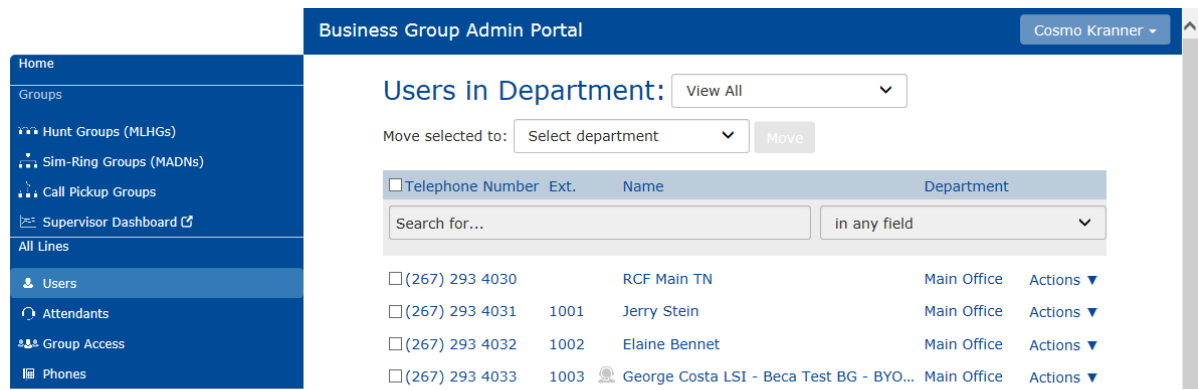
- **Filter** to a specific department by using the drop down at the top of the screen. This will narrow the results to show one department's lines.
- **Download all Lines** button downloads a CSV file that lists the name, telephone number, and department of each line.
- **Search** for a specific line, number, or extension using the *Search for...* field. The dropdown box on the right of this search field allows the administrator to specify whether the search should be applied to a specific field or column. Entering *admin* in the search textbox will show any administrators in the department.



Administrators can use the primary or subsections of the Lines view to manage all telephone numbers in their departments. The *Actions* **Actions ▼** dropdown beside a line allows the administrator to make changes to the lines. See the sections that follow for specific features.

3.1 Users

The Users section will list many phone numbers on your account. Lines in this section will exclude any found in the other sections for Group Access and Attendants.



The *Actions* **Actions ▼** dropdown beside a line gives access to the following:

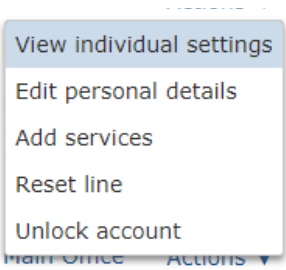
- **View individual settings** for that line allows the administrator to manage call and message settings that the user normally has access to via their own User CommPortal. Clicking on the line itself will also show these options.
- **Edit personal details** for the line, including changing the name and designating the line as a business group administrator.
- **Add services** for the line such as individual account codes or call blocking.
- **Reset line.** This enables the administrator to allocate the line to a different subscriber.
- **Unlock account.** This allows the administrator to unlock an account if a subscriber has incorrectly entered their password multiple times and been locked out.

Each of these features is discussed in the following sections.

3.1.1 View Individual Settings

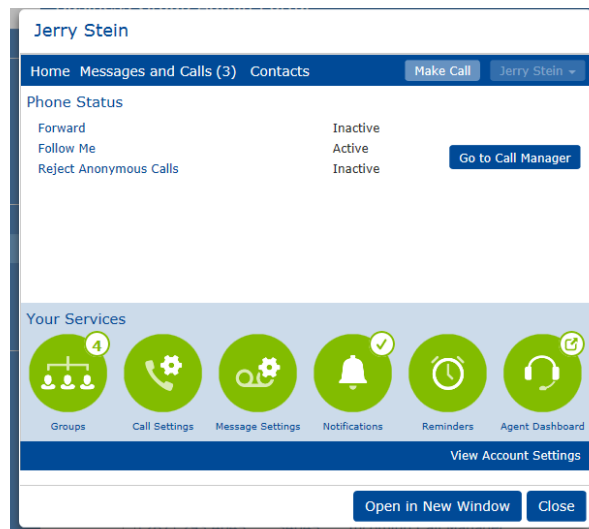
If the *View Individual Settings* option is available in the *Actions* drop down, the administrator can launch it to manage settings such as call forwarding, voicemail to email, and other account settings for that particular user. Clicking on the line name will launch this section as well.

Keep in mind that if they have been given access to it, most users can make many of these changes to their own line through the Personal CommPortal. Please see *Personal CommPortal Guide* for instructions on access and use of this.



3.1.1 Individual Settings Home Page

When accessing the individual settings of a line, you are first taken to the setting home page.



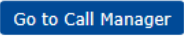
To view the settings in an easier, larger manner, click the “Open in New Window” button.

3.1.1.1 Call Manager

A line’s Home page may be used to configure incoming call services available on the line through the *Call Manager*.

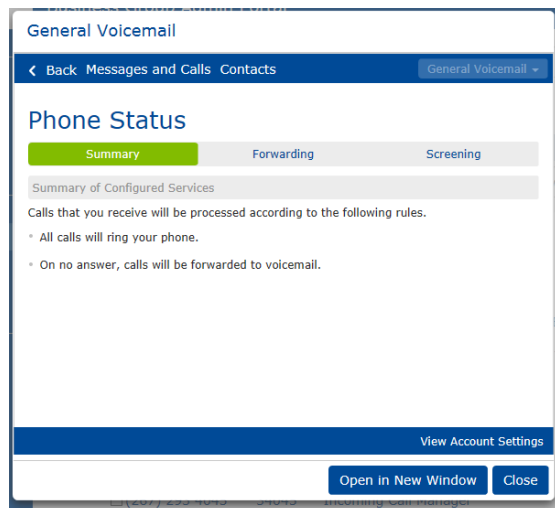
The available forwarding varies based on the services tied to the account and the type of line you are managing. The primary types of this service are:

- **Basic Call Manager**
- **Find Me Follow Me Call Manager**
- **Incoming Call Manager**
- **Business Call Manager**

Each are described in the following sections and can be accessed by clicking the line’s  button.

3.1.1.1.1 Basic Call Manager

If the user has a Basic Call Manager configured, you will see the following tabs in their call manager section:



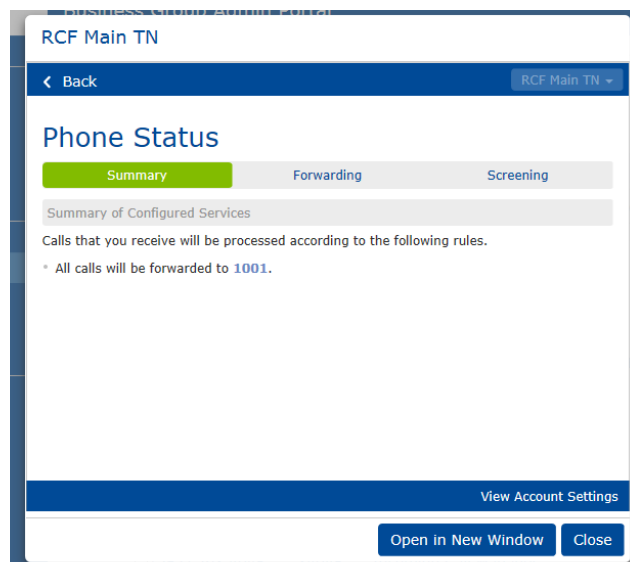
Click the related tab to navigate to it.

- **Summary**- Gives a description of the current settings for incoming calls.
- **Forwarding**- Offers several forwarding settings you may modify.
- **Screening**- Allows you to screen incoming calls.

Each of these sections is described in greater detail below.

Summary (Basic)

The Summary section gives an overview of how the incoming calls are being handled.



In the example above, the Summary states that all calls are forwarding to extension 1001

The Summary page is a brief overview and does not give all the details of each of these features. For more information on any/all features enabled on the line, navigate to one of the supporting tabs.

Forwarding Tab

The Forwarding tab offers several different options for forwarding calls received by the line elsewhere.

RCF Main TN

< Back RCF Main TN

Phone Status

Summary **Forwarding** Screening

Immediately Forwarding Destinations

Apply Cancel

☒ Forward calls immediately.

Forward calls to: 1001

Hint: Use the Forwarding Destinations tab to add numbers that you frequently forward calls to.

View Account Settings

Open in New Window Close

Immediately Forwarding

Immediate forwarding forward incoming calls to a specified destination immediately. If a call is not answered at that destination, it will go to that destination's voicemail, etc.

To modify *immediate* forwarding on a line:

- Select **Forwarding** tab.
- Select the **Immediately** section.
- Checkmark the '**Forward calls immediately**' box.
- **Enter** the ten digit phone number or internal extension to forward calls to in the *Forward calls to:* text box.
- Click **Apply**.

RCF Main TN

< Back RCF Main TN

Phone Status

Summary **Forwarding** Screening

Immediately Forwarding Destinations

Apply Cancel

☒ Forward calls immediately.

Forward calls to: 5551234567

Hint: Use the Forwarding Destinations tab to add numbers that you frequently forward calls to.

View Account Settings

Open in New Window Close

The picture above shows *immediate* forwarding active. All calls that are sent to this line will ring to 555-123-4567.


It is very important to note that you may have virtual lines on your system that **MUST** be forwarding to a destination. For example, if you have any toll free telephone numbers in your lines list, it must be forwarding to a real extension or phone number in order to be answered. Similarly, remote call forwarding (RCF) lines must be forwarding to a destination. Should you have any questions about the lines on your account, please contact Telesystem for assistance.

Forwarding Destinations

The *Forwarding Destinations* section allows you to define names for the numbers you want to forward calls, allowing you to quickly and easily select destinations from drop-down menus in the other forwarding sections. If you are changing where a line forwards often, it will make it easier to preconfigure those destinations in this section.

To Add forwarding destinations to the list:

- Select **Forwarding** tab.
- Select **Forwarding Destinations** section.
- In the New Destination pane:
 - Enter a label/name in the **Destination** field.
 - Enter the ten digit phone number or extension of the destination in the **Number** field.
- Click **Add**.
- Click **Apply**.

Configured forwarding destinations you have added will appear in the left pane of this section. You may add selections using the steps above, or to delete them by clicking on the  icon by the number to remove from the list.

Once configured, destinations will show in a dropdown box to choose from within each forwarding section.

Screening Tab

The Screening section allows you to view and change call rejection settings.

The screenshot shows the 'Phone Status' screen with the 'Screening' tab selected. The 'Selective Rejection' subsection is active, showing an unchecked checkbox for 'Reject calls if they are from selected callers.' and an empty 'Call To Reject' list. The interface includes a 'Back' button, a 'RCF Main TN' dropdown, and 'Open in New Window' and 'Close' buttons at the bottom.

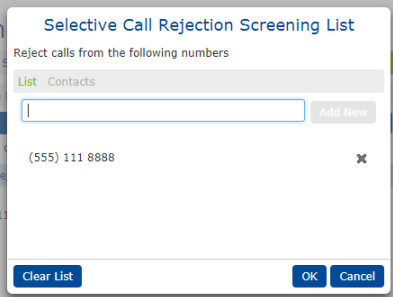
The *Selective Rejection* subsection allows you to reject calls only from certain numbers. If calling from a rejected number, the caller will hear a system message notifying them that you are not accepting calls from their telephone number.

This screenshot shows the same 'Phone Status' screen, but with the checkbox 'Reject calls if they are from selected callers.' checked. The 'Call To Reject' list now contains the number '(555) 111 8888'. The 'Edit List' button is now active (highlighted in blue). The 'Back' button, 'RCF Main TN' dropdown, and bottom navigation buttons remain visible.

All calls from the numbers that show up in the *Call To Reject* pane will be rejected.

To add Selective Rejection in this section:

- Select **Selective Rejection** section.
- **Checkmark** the *'Reject calls if they are from selected callers'* box.
- Click **Edit List**.
- **Type** the telephone number in the field provided or choose from existing Contacts.
- Click **Add New**.
- Click **OK** when you are done entering all numbers.
- Click **Apply**.

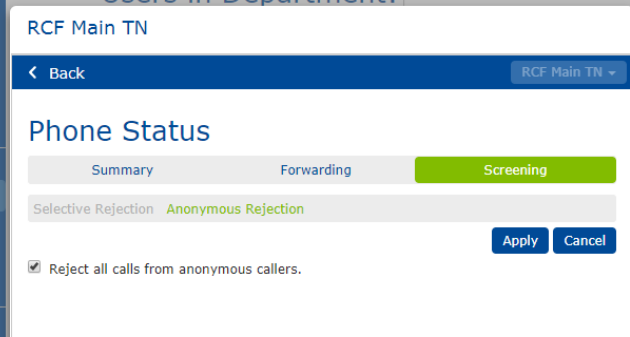


The screenshot shows a dialog box titled "Selective Call Rejection Screening List". It contains a text input field with the placeholder "List" and a button "Add New" to its right. Below the input field, there is a list of numbers, with "(555) 111 8888" visible. At the bottom of the dialog, there are three buttons: "Clear List", "OK", and "Cancel".

After the initial setup, the **Edit List** button in this section will allow you to continue to add, change, or remove the rejection numbers.

The *Anonymous Rejection* subsection allows you to reject all calls that withhold their caller ID information.

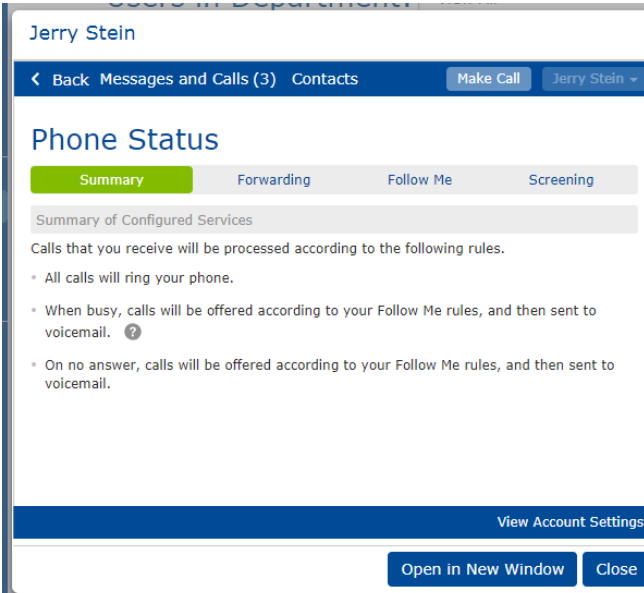
To activate this feature, place a checkmark in the *'Reject all calls from anonymous callers'* box, then click the **Apply** button. To disable, simply remove the checkmark then Apply.



The screenshot shows the "Phone Status" screen for "RCF Main TN". It has tabs for "Summary", "Forwarding", and "Screening", with "Screening" currently selected. Under the "Screening" tab, there are two subsections: "Selective Rejection" and "Anonymous Rejection". The "Anonymous Rejection" subsection is active, showing a checkbox labeled "Reject all calls from anonymous callers." which is checked. There are "Apply" and "Cancel" buttons at the bottom right.

3.1.1.1.2 Find Me Follow Me Call Manager

If the user you are viewing has Follow Me services configured, you will see four tabs in their call manager section:



The screenshot shows the "Phone Status" screen for "Jerry Stein". It has tabs for "Summary", "Forwarding", "Follow Me", and "Screening", with "Summary" currently selected. Under the "Summary" tab, there is a section titled "Summary of Configured Services" which states: "Calls that you receive will be processed according to the following rules." followed by three bullet points: "All calls will ring your phone.", "When busy, calls will be offered according to your Follow Me rules, and then sent to voicemail.", and "On no answer, calls will be offered according to your Follow Me rules, and then sent to voicemail." At the bottom right, there are buttons for "Open in New Window" and "Close".

Click the related tab to navigate to it. Several of the tabs are also present in the basic call manager service and have been explained previously.

- **Summary**- Gives a description of the current settings for incoming calls (explained in section 3.1.1.1.1).
- **Forwarding**- Offers several forwarding settings you may modify (explained in section 3.1.1.1.1).
- **Follow Me**- Offers a specific type of forwarding service explained in the sections to follow.
- **Screening**- Allows you to screen incoming calls (explained in section 3.1.1.1.1).

The *Follow Me* feature gives access to a more advanced forwarding service. This service can forward calls to multiple destinations either simultaneously or in sequence after ringing your desk phone. You may also limit the time of day this forwarding occurs.

When you use the *Follow Me* service, the desk phone will always ring first in its normal fashion. If the phone is not answered, the *Follow Me* rules are engaged instead of the call going to voicemail.

It is important to note that, if enabled, the Immediate Forwarding settings (see section 3.1.1.1.1) will override the *Follow Me* settings. Please be sure to disable any former *Immediate Forwarding* settings if you intend to use *Follow Me* instead.

Setting up Follow Me Rules


Rule sets must be configured to direct the *Follow Me* feature on how you want to forward calls.

To add a *Follow Me* rule:

- Navigate to the **Call Manager** section.
- Select **Follow Me** tab.
- **Checkmark** the *Forward calls you receive to one or more alternate destinations* text box.
- Click **Add Rule**.
- Configure the rule:
 - Type in the telephone number of the forwarding destination for the rule in the **Telephone Number** field.
 - In the **Ring Destination for** field, choose how long to ring that destination (6 seconds per ring)
 - *Note: Be sure that you do not ring your destination longer than its normal ring cycle. For example, since most cell phones ring no more than 4 or 5 times, entering not more than 18 or 24 seconds in this field is advised so that cell voicemail does not pick up.*
 - **Modify** the days of the week and hours you want the forwarding service to be active.
 - Click the **OK** button.
 - **Add** other rules if desired.

The screenshot shows a configuration window for a 'Follow Me' rule. At the top, there is a 'Telephone Number' field with the value '5551234242'. Below this is a 'Hint' that says 'Use the Forwarding Destinations tab to add numbers that you frequently forward calls to.' The 'Ring destination for' field is set to '18' seconds. The 'Days of the week' section has checkboxes for Sun, Mon, Tue, Wed, Thu, Fri, and Sat, with Mon, Tue, and Wed checked. The 'Start and End Hours' section has 'Start time' set to 08:00 am and 'End time' set to 06:15 pm. At the bottom right are 'OK' and 'Cancel' buttons.

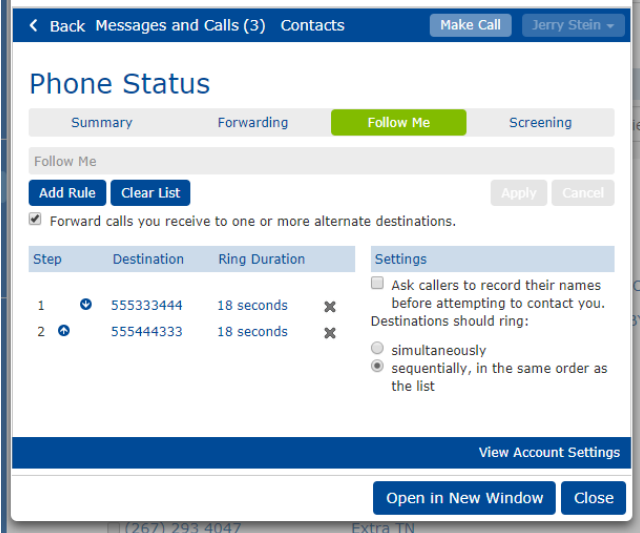
- Click the **Apply** button.

You may edit rules by clicking on the existing rule in the Follow Me section or delete them by clicking on the  to the right of the rule.

About Follow Me Rules

It is important to note that when *Follow Me* is enabled, the desk phone will ring normally first. If the call is not answered at the desk phone, the *Follow Me* feature will then be engaged instead of voicemail. If the call is not answered at any of the *Follow Me* destinations, it will resolve back to the desk phone's voicemail.

Below is an example of an account that has activated Follow Me:





Phone Status

Summary Forwarding **Follow Me** Screening

Follow Me

[Add Rule](#) [Clear List](#) [Apply](#) [Cancel](#)

☒ Forward calls you receive to one or more alternate destinations.

Step	Destination	Ring Duration	
1	555333444	18 seconds	
2	555444333	18 seconds	

Settings

☐ Ask callers to record their names before attempting to contact you.

Destinations should ring:

☐ simultaneously

☒ sequentially, in the same order as the list

[View Account Settings](#)

[Open in New Window](#) [Close](#)

In the example above, the user has added two rules to the *Follow Me* service. When the number or extension is called directly:

- The **desk** phone will ring the normal number of times it is set to do so before going to voicemail.
- If the call is not answered at the desk phone, the call will ring **555-333-4444** for three rings.
- If the call is not answered there, the call rings the **555-444-3333** for three rings.
- If the call is not answered there, the call will be sent to the user's **voicemail** that is already setup on their direct dial number.

The caller can abandon the *Follow Me* search at any time and go directly to voicemail by pressing "0".

Choosing the setting to make *Follow Me* ring *simultaneously* (in the right pane) will ring all Follow Me rules simultaneously. The first step will still only ring the desk phone then *Follow Me* rules will be activated when that it not answered.

Phone Status

Summary Forwarding **Follow Me** Screening

Follow Me

Add Rule Clear List Apply Cancel

☒ Forward calls you receive to one or more alternate destinations.

Destination		
555333444	18 seconds	X
555444333	18 seconds	X

Settings

☐ Ask callers to record their names before attempting to contact you. Destinations should ring:

☒ simultaneously

☐ sequentially, in the same order as the list

View Account Settings

Open in New Window Close

In the alternative example above, when the direct dial phone number of the user or their extension is called directly:

- The **desk** phone will ring the normal number of times it is set to do so before going to voicemail.
- If the call is not answered at the desk phone, 555-333-4444 and 555-444-3333 ring three times at the same time.
- If the call is not answered at either Follow Me destination, the call will be sent to the user's **voicemail** that is already setup on their direct dial number.

3.1.1.1.3 Incoming Call Manager

Lines with the Incoming Call Manager (ICM) service on the line have access to a robust set of forwarding features on the section's four tabs:

Incoming Call Manager

Back Call History Contacts Make Call Incoming Call Manager

Phone Status

Summary Rules Weekly Schedule Special Days

Apply Cancel

When I receive a call

☐ Ring my phone

☐ Forward to

☐ Send to voicemail

☒ Use my rules (or set up new rules)

☐ Handle depending on the time or day

Additional options

View Account Settings

Open in New Window Close

An Incoming Call Manager may be used to direct calls based on time of day, ring several phones at the same time, or even set up special routing for holidays. The ICM handles its incoming calls based on the parameters that have been set up for it.

Though lines with an ICM can simply ring the associated phone (if applicable), incoming calls can also be managed in more complex ways. Each of these is explained in the sections that follow.

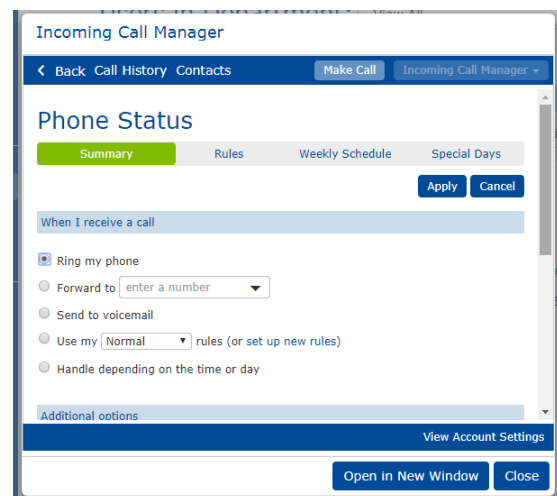
3.1.1.1.3.1 Summary (ICM)

The Summary page shows at a glance how the ICM is managing calls.

The Summary screen is the easiest way to switch between the call treatment for incoming calls. For example, if you are handling your calls based on the time or day but want to simply ring your phone instead, you can make the change quickly and immediately here. Be sure to press **Apply** after making any changes. More information on all the different ways of managing calls follow.

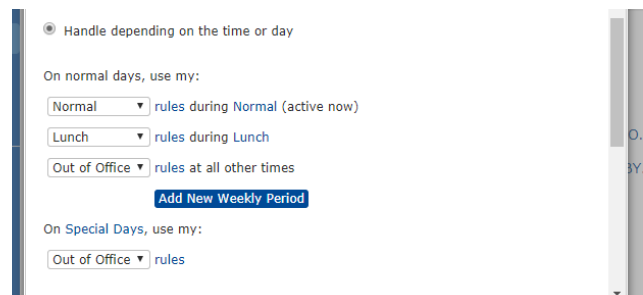
Select one of the three options in *When I Receive a Call* to managed calls as follows:

- **Ring my phone:** ring the primary phone assigned to the account
- **Forward to:** send all calls directly to an alternate phone number or extension
- **Send to voicemail:** send all calls directly to the account's voicemail box
- **Use my xxxx Rules:** use a rule that rings one or more phones when incoming calls are received
- **Handle depending on the Time or Day:** handle calls based on a schedule



If you have chosen to use the *Handle depending on time or day* option, you can allocate a specific set of rules to each scheduled period (see more on rules and schedules in the sections that follow.)

Simply use the drop down boxes by the name of the scheduled time and choose an appropriate rule before clicking *Apply*.



Please note that the Rules and Time of Day options may not appear if nothing has yet been set up in the Rules and Weekly Section.

If you have chosen to ring your phone in any scenario, you may manage *Additional Options* as follows:

- **If I don't answer:** If you receive a call that you do not answer, you can forward the call to an alternate number, to voicemail (default), or reject it completely using these options.
- **If I'm in a call:** If you receive a call but all your lines are in use (busy), you can forward the call to an alternate number, to voicemail (default), or reject it completely using these options.
- **What audio should callers hear before their call is answered:** the default ringback allows the caller to hear that the phone is ringing until you answer it. Alternately, you can upload a custom greeting or ringback for the caller to hear instead by choosing the second option then clicking *Record*.
 - When the *record* option is selected, you can record a greeting to play as the ringback if you have a microphone attached to your computer. Alternately, you can upload your own wav file to serve as the ringback.

3.1.1.1.3.2 Rules

The Rules section allows you to configure call treatment for incoming calls. All available rules are shown in the left pane and the summary of what the selected rule does appears in the right pane.

To add a new rule:

- Select **Rules** tab
- Click **Add New Set of Rules**
- **Enter** a name for the new rule then click **OK**

To rename an existing rule:

- Select **Rules** tab
- Click the rule you want to modify

- Click **Rename** then enter the new name
- Click **Apply**

To delete an existing rule:

- Select **Rules** tab
- Click the **X** to the right of the rule you want to delete
- Click **Apply**

To edit an existing rule:

- Select **Rules** tab
- **Select** on the rule to modify then click **Edit**
- **Modify** the rule as needed then click **Finish** then **Apply**

Types of Rules

The following types of rules are available in incoming call managers:

- **Ring my phone using...**

If a desk or soft phone is assigned to the account, this option will ring that primary phone when receiving incoming calls. You may choose from several ringtones for this option.

- **Forward to..**

Forward all incoming calls to an alternate destination. Enter a valid ten digit phone number or an internal extension into this field.

- **Send to voicemail**

Send all incoming calls directly to a voicemail box associated with the account. This is only valid if voicemail has been enabled on the line.

- **Play a reject message and reject the call**

Reject the incoming caller completely by playing a rejection message.

- **Ask the caller to say their name before I accept the call**

Requires that the caller records their name. When you answer, the system will play their name and will prompt you to accept or reject the incoming call by pressing a button on your phone.

- **Ring more than one phone at the same time or in sequence**

This option can ring several phones simultaneously or in sequence. See example below.

- **Ask the caller to say their name before ringing more than one phone at the same time or in sequence**

Ring several phones simultaneously or in sequence after the caller records their name. When any of the ringing destinations answer, the system will play their name and will prompt you to accept or reject the incoming call by pressing a button on your phone.

If you have chosen to ring more than one phone at the same time or in sequence, there are several additional steps necessary to finish the configuration.

To ring more than one phone at the same time or in sequence:

- Select **Rules** tab
- **Select** on the rule to modify then click **Edit**
- Choose Ring more than one phone at the same time or in sequence then click **Next**

- **Enter or modify the lines to ring:**

- Add a new phone number or extension by typing it into the Phone Number field, entering the start and end ringtime, then click **Add**. Repeat as necessary.

- After the ringing destinations are entered, the arrows may be dragged to add or remove ringing time. Each square is approximately one ring. Lines may ring simultaneously or sequentially (pictured). Lines can be removed by clicking the X to the right of the line.

- Choose what should happen if none of the destinations answer the call by filling in *If I don't answer or all lines are busy*. This is set to go to your voicemail by default, but if it should forward back to the main line or to your cell, enter that instead.
- Click **Finish** then **Apply**

It is important to note that the ICM will ignore personal forwarding rules set by individuals. For example, if person A, B, and C are in a simultaneous ICM ring group, but person B sets their phone to forward to their cell phone for the day, the ICM will ignore their rule. Any calls *directly* to person B's extension or direct dial number will follow their rules and ring the cell phone. Any call *through the ICM* will ring their desk phone as normal. The exception to this is Do Not Disturb. The ICM will honor the DND feature if engaged on one or more individual's phones in the ring group.

3.1.1.1.3.3 Weekly Schedule (ICM)

The Weekly Schedule section allows you to configure call treatment for incoming calls based on the time of day or day of the week it is.

Each schedule may have up to three outlined periods in addition to the white space which is considered "all other times".

Phone Status

Choose how calls to (267) 293 4035 will be directed. Apply Cancel

☒ Available

☐ Do Not Disturb

☐ Forward All Calls

Normal callers

- ☒ Ring my phones at the same time:
 - ☒ My Phone (267) 293 4035
 - [add more phones](#)
 - ☐ Forward to (555) 444 8888
 - ☐ Send to voicemail
- Anonymous**
- VIP**
- Unwanted**
- Additional options**

Personal Details
 Danielle Smith
 South Office
[Devices](#)

Security
[Change Password](#)
[Change Call Services PIN](#)
[Change Voicemail PIN](#)

Support
[Help](#)
[Downloads](#)

Business call managers allow the user to manage the way they receive phone calls using the three sections:

- **Available**- modify the way incoming calls reach you while your phone is available.
- **Do Not Disturb**- reject all calls directly to voicemail.
- **Forward All Calls**- send all calls directly to a different destination.

Each of these are discussed in the sections that follow.

3.1.1.1.4.1 Available Tab

The Available tab of the business call manager configures how incoming calls reach you while you are available.

Normal Callers

The Normal Callers section allows you to ring several phones at the same time, forward all calls elsewhere, or send all calls to voicemail.

To ring several phones at the same time:

- Select **Available** tab
- Select **Normal Callers**
- Select **Ring my phones at the same time**
- Click **add more phones (or change my phones)**
- **Add or remove** other ringing destinations. To add, input the name and phone number or extension. To remove, click on the **X** to the right of the entry. Repeat for additional numbers as necessary.
- Click **OK**

My Phones

Set up phone numbers that you can choose to ring.

Name	Number	
My Phone	(267) 293 4035	X
Cell	555111444	X
Home Office	555222555	X
		X
		X

OK Cancel

- Place a **checkmark** by all lines you wish to ring simultaneously
- Click **Apply**

▼ **Normal callers**

☒ Ring my phones at the same time:

☒ My Phone (267) 293 4035

☐ Cell (555) 111 4444

☒ Home Office 555222555

[change my phones](#)

It is important to keep *My Phone* checked if you want your primary line to ring.

To forward all calls to a different destination:

- Select **Available** tab
- Select **Normal Callers**
- Select **Forward to....**
- Click the destination number to modify if necessary then click **OK**
- Click **Apply**

▼ **Normal callers**

☐ Ring my phones at the same time:

☒ My Phone (267) 293 4035

[add more phones](#)

☒ Forward to (555) 444 8888

☐ Send to voicemail

To send all calls to voicemail:

- Navigate to the **Home** screen
- Select **Available** tab
- Select **Normal Callers**
- Select **Send to Voicemail**
- Click **Apply**

▼ **Normal callers**

☐ Ring my phones at the same time:

☒ My Phone (267) 293 4035

[add more phones](#)

☐ Forward to (555) 444 8888

☒ Send to voicemail

Anonymous

By default, if you receive a call from an anonymous (no caller ID) entity, it will be handled with the rules you have outlined in the Normal Callers section. If you wish to apply an alternative treatment to these calls, the Anonymous section allows you to add rules that apply only to Anonymous calls.

To modify the Anonymous call settings:

- Select **Available** tab
- Select **Anonymous**
- Options available include:
- Place a checkmark by *Ask caller to say their name before I accept the call* to require the caller to say their name. When you answer a call with this treatment, you will hear the callers name and can choose whether or not to accept it.
- Choose the *Send to voicemail* option to send all anonymous calls to voicemail.

▼ **Anonymous**

☒ Handle like Normal callers

☐ Ask caller to say their name before I accept the call ?

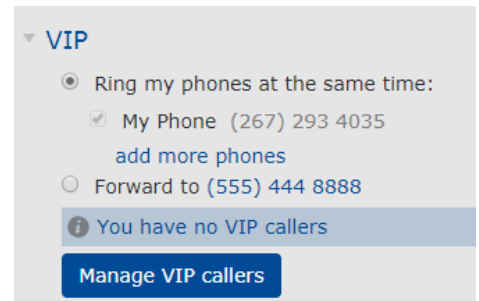
☐ Send to voicemail

VIP

The VIP section allows you to create a list of priority callers for which a different call treatment will be assigned. For example, you may wish to only ring your desk phone with normal callers, but when certain clients call, you want several phones to ring simultaneously. The list of VIP callers and the associated treatment can be set up in this section.

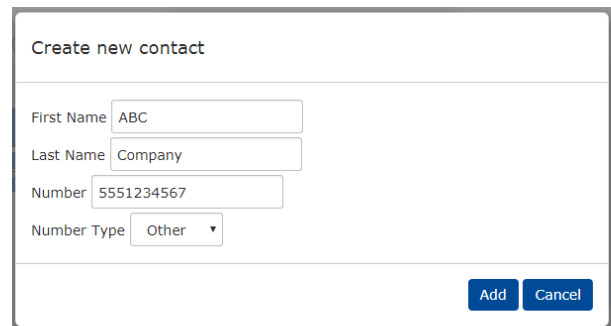
To assign a treatment for VIP callers:

- Select **Available** tab
- Select **VIP**
- Options available include:
 - To ring several phones at the same time, choose the *Ring my phones at the same time* then click *add more phones* and add or remove ringing destinations.
 - To forward these VIP callers directly to another phone number or extension, select *Forward to ...* and modify the destination as needed.
- Click **Apply** to save any changes.



To create a list of VIP Callers:

- Navigate to the **Home** screen
- Select **Available** tab
- Select **VIP**
- Click **Manage VIP callers**
- Add new telephone numbers then press **Enter**
- In the screen that appears, finish detailing the contact's first and last name then press **Add**.
- Click **OK** to complete.

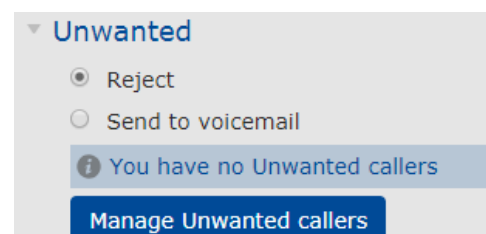


Unwanted

The Unwanted section allows you to create a list of callers you want to reject completely or send directly to your voicemail.

To assign a treatment for VIP callers:

- Select **Available** tab
- Select **Unwanted**
- Options available include:
 - To reject unwanted calls with a rejection message, select the *reject* button
 - To send unwanted calls directly to voicemail, select the *send to voicemail* button



- Press **Apply**

To create a list of Unwanted Callers:

- Navigate to the **Home** screen
- Select **Available** tab
- Select **VIP**
- Click **Manage Unwanted callers**
- Add new telephone numbers then click **Enter**
- In the screen that appears, finish detailing the contact's first and last name then click **Add**.
- Click **OK** to complete.

2.4.1.5 Additional Options

The Additional Options section modifies any treatment of incoming calls where you have chosen to ring your primary line ("My Phone"). This section allows you to set up no answer or busy forwarding as shown below.

To modify the Additional Options section:

- Select **Available** tab
- Select **Additional Options**
- Options available include:
 - *If I don't answer* allows you to choose to send a call to an alternate number or voicemail if your phone rings but you do not answer it.
 - *If I'm in a call* allows you to choose to send a call to an alternate number or voicemail if your line is busy. Keep in mind that your device may allow for more than one call- all of your call paths must be busy for this forwarding to engage.
- Click **Apply**.

3.1.1.1.4.2 Do Not Disturb Tab

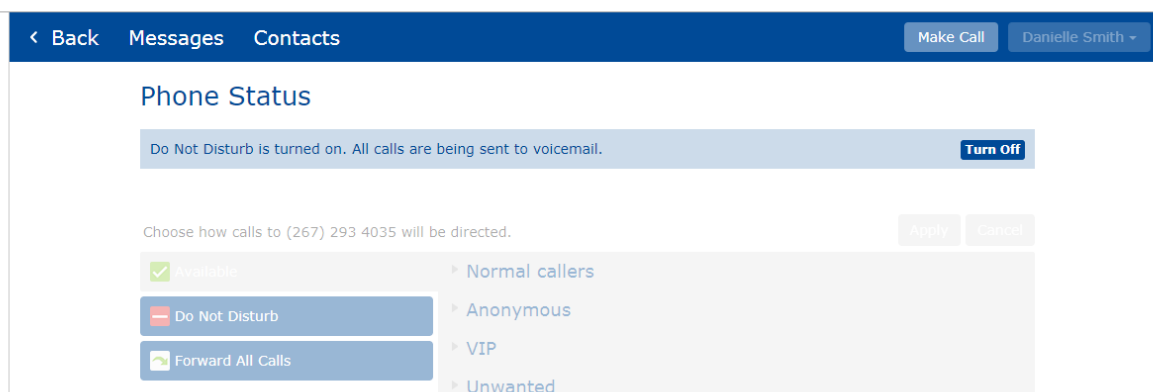
If you choose not to be available for calls, you may place yourself into Do Not Disturb to send all calls to voicemail. This feature may also be engaged and disengaged from most desk phones or the soft phone application. While Do Not Disturb is on, you may still make outbound calls normally.

To turn Do Not Disturb on:

- Click **Do Not Disturb** tab
- Changes will be reflected in the primary call manager screen to confirm that Do Not Disturb is on.

To turn Do Not Disturb off:

- Click **Turn Off**



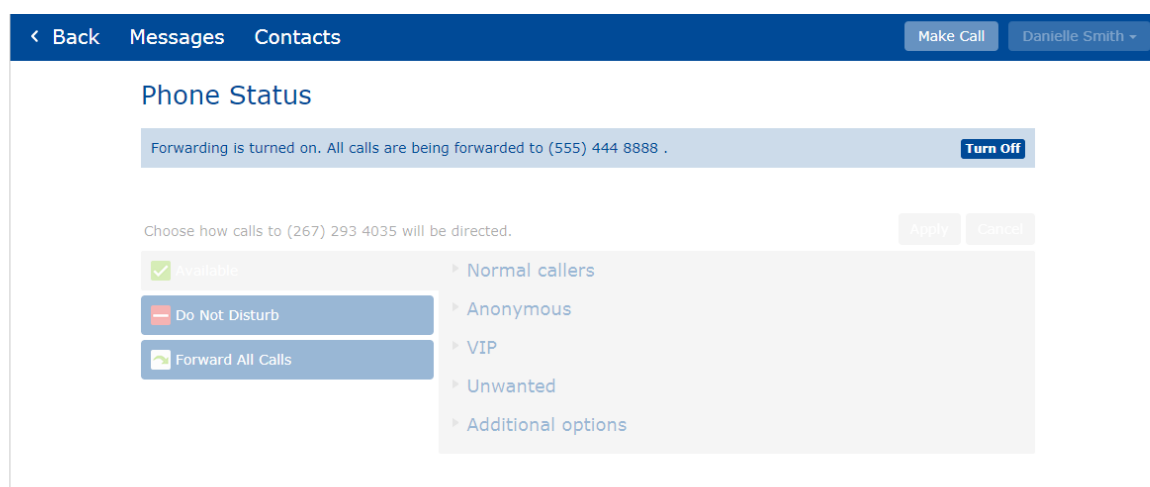
- Changes will be reflected in the Home screen to confirm that Do Not Disturb is off

3.1.1.1.4.3 Forward All Calls Tab

If you wish for all incoming calls for a line to be forward to an alternate phone number or extension, this change can be made quickly in the Forward All Calls tab of the business call manager.

To Forward All Calls:

- Click **Forward All Calls** tab
- Forwarding will be turned on immediately. To modify the forwarding destination, click on the telephone number to change it.
- Changes will be reflected in the Home screen to confirm that all calls are forwarding.

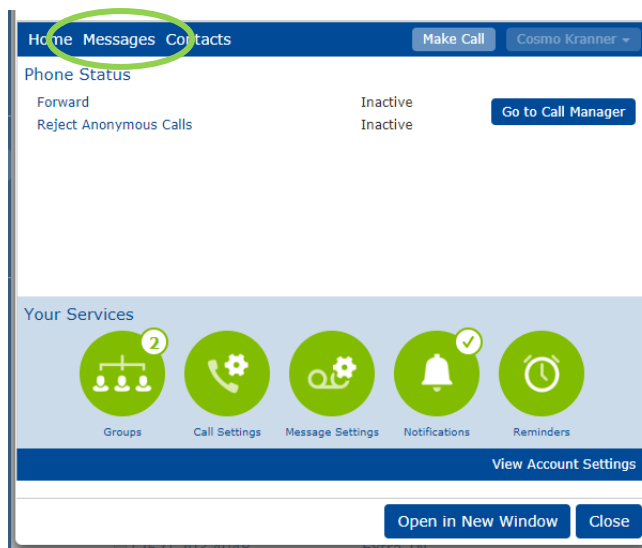


To turn Forward All Calls off:

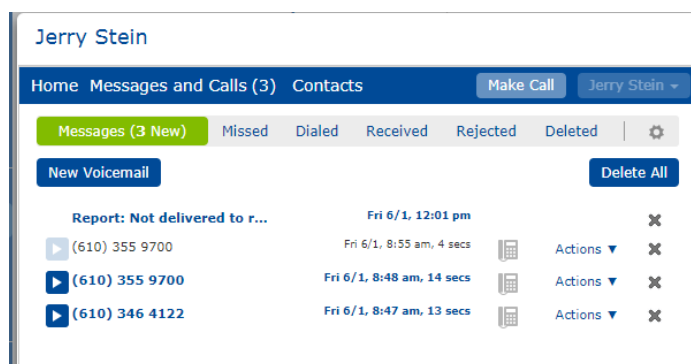
- Navigate to the **Home** screen
- Click **Turn Off** tab

3.1.1.2 Messages

While viewing the line's *Individual Settings*, the top toolbar will include quick access to the *Messages* section if voicemail or faxing is enabled on the account. Administrators can see whether the users have messages in their account, however message audio may not be played back.

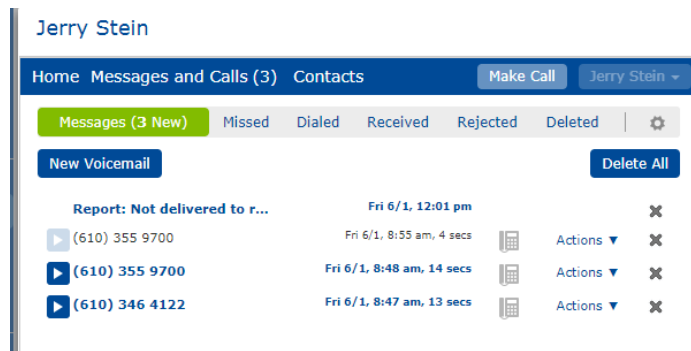


To access the messages section, click the title, *Messages*. If there are new messages, the title may say *Messages and Calls*. Depending on the services on the account, several subsections are available that are explained in below.



Messages Subsection

Messages are voicemails that have been received to your phone number. This section shows all new and stored voicemail messages (if messages are being retained in the portal see section 3.1.1.3.3).

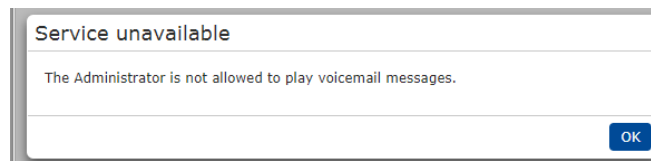


All unheard (new) messages are shown in **bold** type. All messages will list the caller identification information, time and date of the call, and length of the voicemail message. If voicemail transcription is enabled on your line, you will see the transcription in the portal as well.

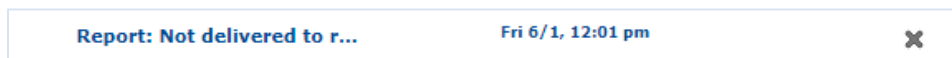
You may modify the voicemail distribution settings to receive messages to your phone and CommPortal, your email, or both. More information on this is found section 3.1.1.3.3.


Administrator tips:

- Administrator playback, deletion, and the features in the *Actions* drop down are not available to the administrator. Users may access all these features in the User CommPortal (see the associated user guide for full information). If an administrator does attempt to perform any disallowed action, an error screen will appear. An example is below:



- If an incorrect recipient is listed as a recipient of messages, the error report will appear in the messages list. This is a signal to check the configured email address(es) in the message settings. See section 3.1.1.3.3 for more information.



- Clicking the  gear icon in the messages section automatically takes you to the Message Settings section which is discussed in section 3.1.1.3.3.

Faxes Subsection

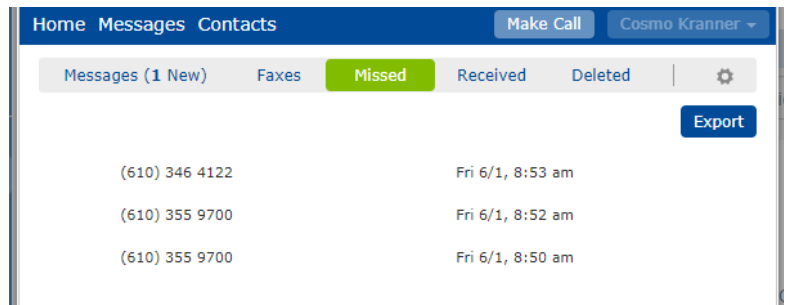
The Faxes section will only appear if there is an associated efax number tied to the account. If efax messages are being retained in the CommPortal, this section shows all new and stored fax messages in the same way Messages tab does for voice messages.

You may modify the message distribution settings to receive or not receive faxes to your CommPortal. More information on this is found in section 3.1.1.3.3.

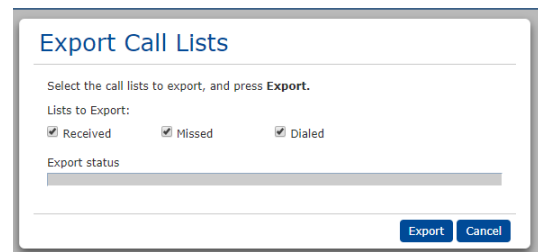
Missed, Received, Deleted Subsections

Administrators can view a subsection for and export a basic report of the following:

- *Missed* - most recent calls the line received, but did not answer.
- *Received* - most recent calls the line received and did answer.
- *Dialed* - most recent calls the line has made.

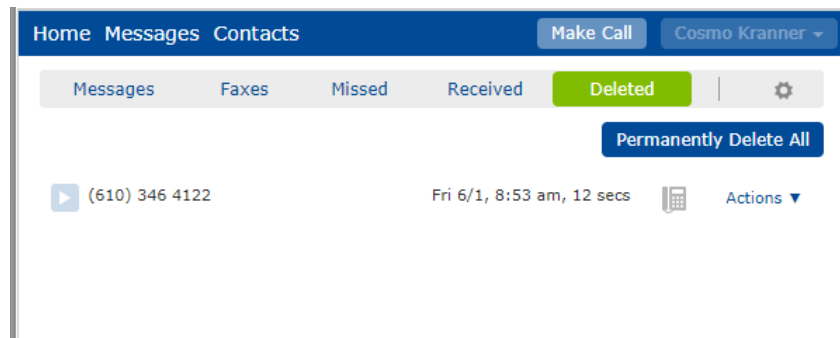


To export a csv file of the calls, click the **Export** button on any of these sections then choose the call type you wish to see.



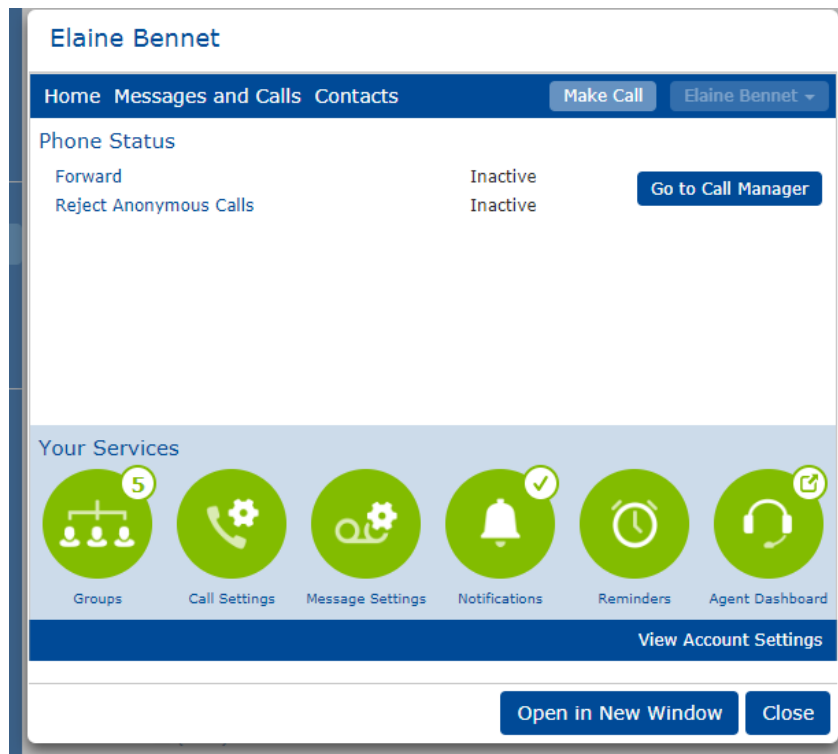
Deleted Subsection

The Deleted section lists recently deleted voicemails and faxes that had been sent to the account. For most accounts, messages are stored for 2 weeks before permanent deletion.

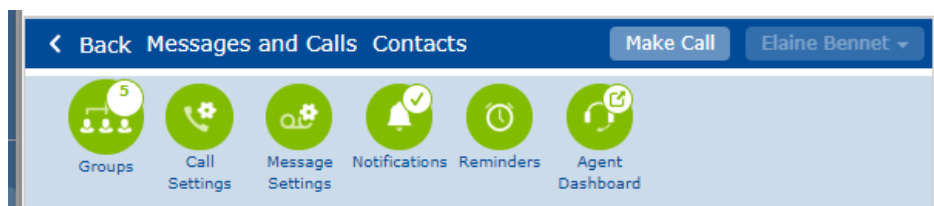


3.1.1.3 Your Services

The individual settings for each line include the *Your Services* section. The services accessible here will vary depending on how the line is configured.



To view or manage any of the services, click the appropriate round, green services button.



While viewing any services, go back to the individual settings main screen by clicking the **< Back** option on the top toolbar. Alternately, you may navigate directly to any of the other individual services by clicking the appropriate round, green services icon.

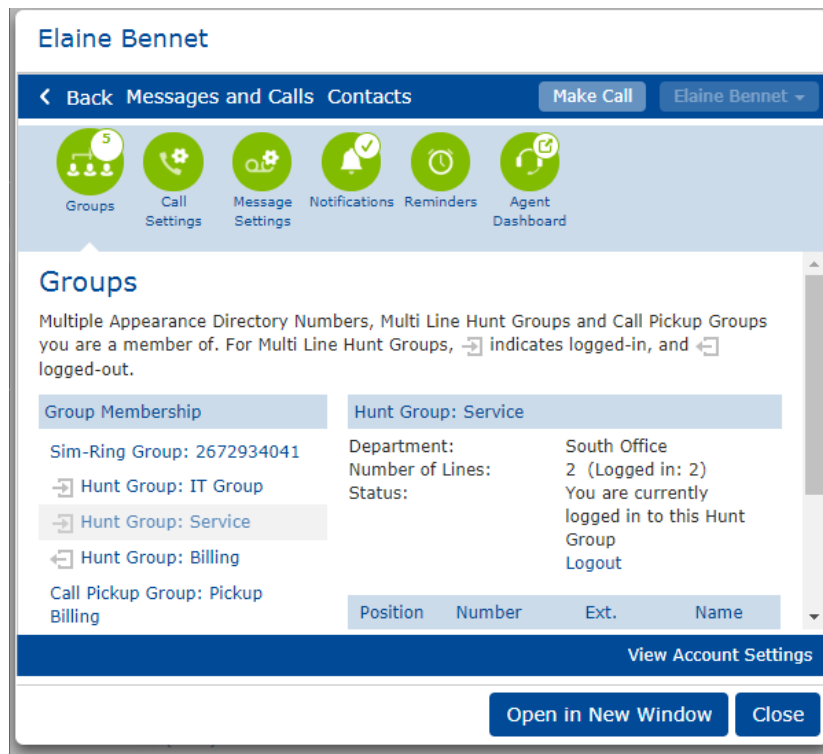
3.1.1.3.1 Groups (Individual)

If a line is a part of any groups, the Groups services section will detail information about each.

The group types in this section may include:

- **Sim-Ring Group**
- **Hunt Group**
- **Call Pick Up Group**

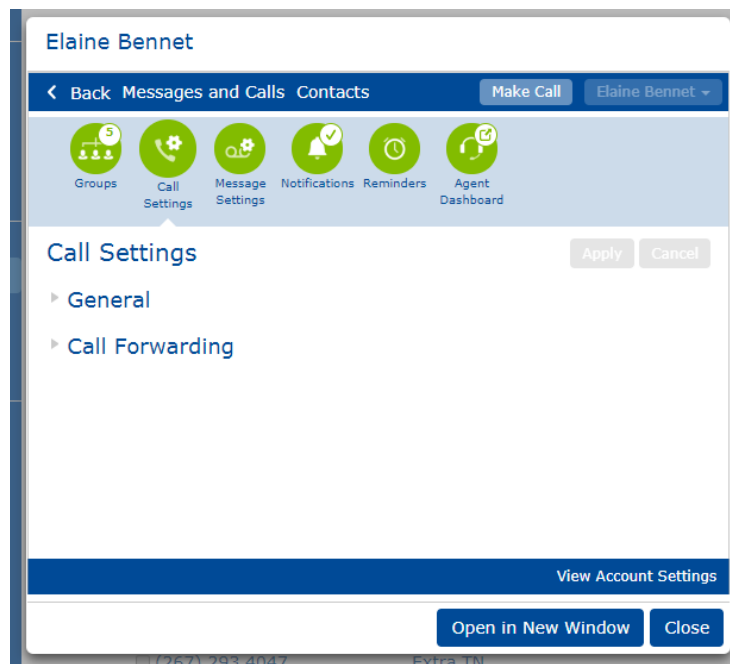
The Groups section allows you to see all the groups that the user belongs to in the **Group Membership** panel. Click on the name of the group in the **Group Membership** panel to display the details of the group in the main part of the screen.



The individual settings group section is intended to show all memberships for a particular line, whereas group management is done in the main group section (see section 2).

3.1.1.3.2 Call Settings

The call settings section gives you access to several options for outbound calls and forwarding.



The *General* section includes the following information and options:

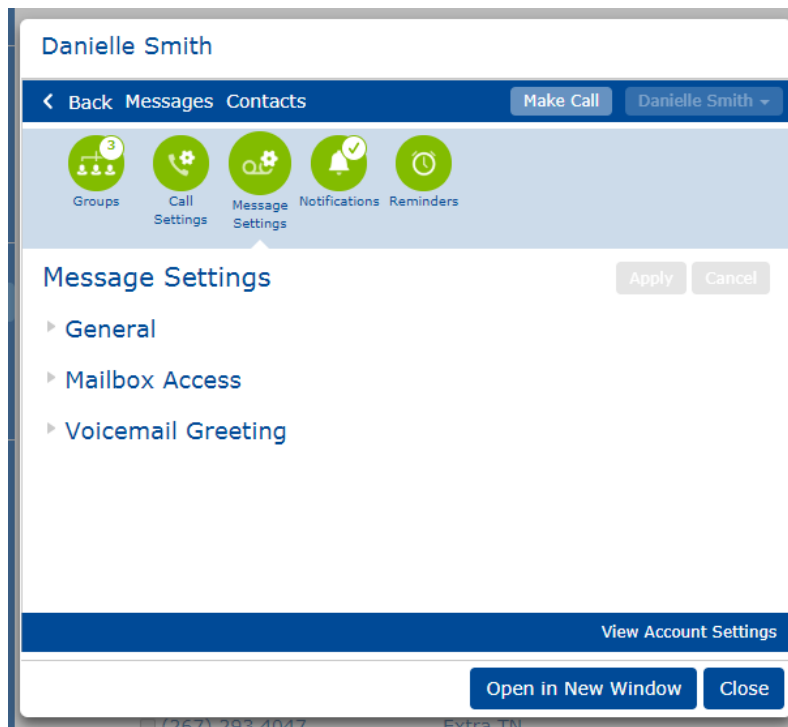
- **States if there is a call transfer number.** A call transfer number provides a “zero out” option to callers when they reach the line’s voicemail message. For example, if the call transfer number is the receptionist’s extension, the user may record their voice message telling the caller to stay on the line to leave a message *or* press 0 to return to the operator. For more information on how the administrator may modify a call transfer number for the business group or department see sections 4.8 and 4.1.

- **Withhold caller ID when making calls-** check to withhold the caller ID information while making outbound calls. Leave this field blank to outpulse the normal caller ID of that line.
- **If not withheld, signal my name as-** Also known as the intercom name, this primarily acts as the internal caller ID name for extension to extension calls. If this is not filled in, the phone will use the line name (section 3.1.2) in most cases.
- **Provide caller ID for incoming calls-** check to enable caller ID number for incoming calls to your phone.
- **Provide caller name for incoming calls-** check to enable caller ID name for incoming calls to your phone.

The *Call Forwarding* section allows you to adjust whether or not the user has to enter a forwarding number each time call forwarding is enabled from the phone set. When the Immediate Forwarding box is checked, the user is required to enter the telephone number to which you want to forward calls. When unchecked, a number is not required after it has been initialized at least once.

3.1.1.3.3 Message Settings

The *Messages Settings* section allows you to modify the way voicemail and faxes are received by the user.



General Message Settings

Use the General section to modify some of the most common voicemail and fax settings.

Message Settings

General

Incoming calls are forwarded to voicemail after seconds

☒ Forward messages and faxes as emails

Forward to:

[cosmo@kramericaind.co](#) [edit](#) | [remove](#)

[add an email address](#)

☒ Leave original in Inbox

Voicemails

☒

Faxes

☒

- **Incoming calls are forwarded to voicemail after...** The associated field shows how many seconds the associated phone will ring *before* forwarding to voicemail. Six seconds is approximately one ring. For example, entering 24 in this field will allow the phone to ring four times before the caller goes to voicemail.
- **Forward messages and faxes as emails.** These fields indicate how voicemail and fax messages are distributed for this account. When users receive messages to phone, they are also saved in their CommPortal. Below are the various scenarios that can be set up.
 - To get messages to phone/commportal only, no boxes should be checked:

☐ Forward messages and faxes as emails

Forward to: [cosmo@kramericaind.co](#) [edit](#) | [remove](#)

[add an email address](#)

☒ Leave original in Inbox

Voicemails ☐ Faxes ☐
 - To get messages to email only, check the box by *Forward messages (and faxes) as emails* then check voicemail and/or faxes to indicate which type of messages should be sent this way. Enter the email address(es) where messages should be sent.

☒ Forward messages and faxes as emails

Forward to: [cosmo@kramericaind.co](#) [edit](#) | [remove](#) Voicemails ☒ Faxes ☒

[add an email address](#)

☐ Leave original in Inbox

- To get messages to email and phone/commportal, check all boxes and enter the email address(es) where messages should be sent.

☒ Forward messages and faxes as emails

Forward to: [cosmo@kramericaind.co](#) [edit](#) | [remove](#) Voicemails ☒ Faxes ☒

[add an email address](#)

☒ Leave original in Inbox

It is important to note that when receiving messages to phone and email, both repositories must be managed separately. In other words, if the voicemail from the phone or user portal, it will still be in email. Additionally, fax services may not be enabled on the account. Please talk to a Telesystem Account Representative if you would like to add this feature.

Mailbox Access Message Settings

The *Mailbox Access* section allows you to modify some of the access options for the user's voicemail account.

Danielle Smith

< Back Messages Contacts Make Call Danielle Smith ▾

Groups Call Settings **Message Settings** Notifications Reminders

Message Settings Apply Cancel

▸ General

▼ Mailbox Access

☐ Skip PIN

☒ Fast Login

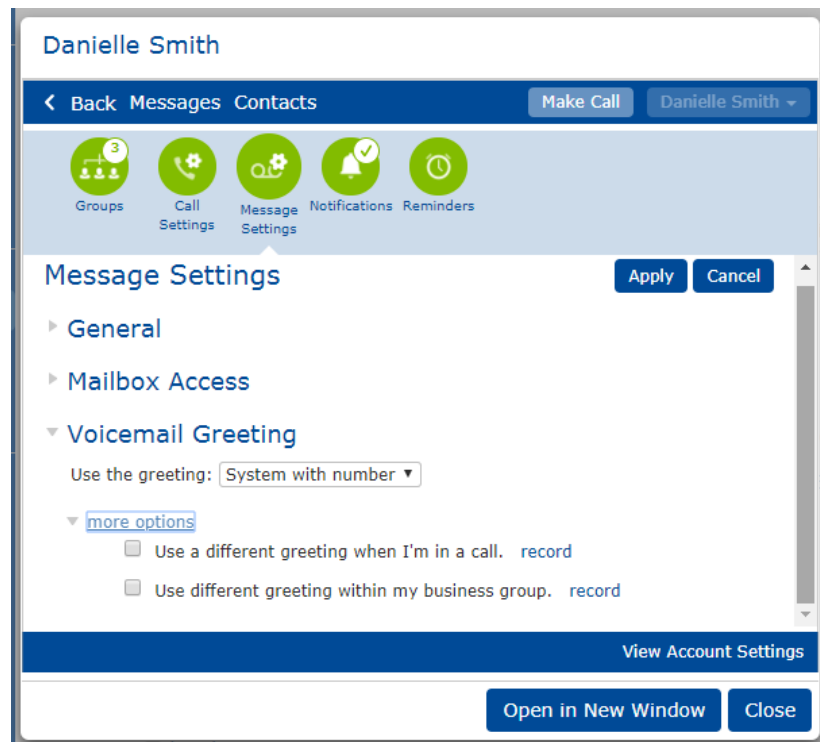
☐ Auto-play voicemail

Voicemail playback Details and Message ▾

- **Skip PIN.** When enabled (checked), the voicemail system will not require a phone user to enter their PIN (password) when accessing the voicemail system from the phone set. This saves time, however reduces the security of the messages.
- **Fast Login.** When enabled (checked), the system will not require the user to enter your ten digit phone number when accessing it from your phone.
- **Auto-play voicemail.** When enabled (checked), new voicemails will begin to play as soon as the user logs into the mailbox instead of going through the main menu options first.
- **Voicemail playback.** When voicemails are played back, the user can choose whether they wish to hear only the message details (who the message is from and when it was recorded), the message itself, or both. This can only be modified via the User CommPortal.

Voicemail Greeting Message Settings

The Voicemail Greeting subsection allows you to change the type of voicemail greeting the user is utilizing. You may select the desired greeting from the list of options available in the drop down. All recorded greetings have an asterisk (*) by them.



In addition to any available, recordable greetings, the system also includes the following standard greetings:

System- This plays the normal system greeting with no identifying information.

System with Number- This plays the normal system greeting including the ten digit phone number.

System with Name- This plays the normal system greeting, but includes the recorded name.

Users may access their voicemail from their primary phone set or via the User CommPortal.

Administrators may not record new greetings from the Administrator CommPortal.

3.1.1.3.4 Notifications

The Notifications section allows you to configure the different kinds of notifications that you can use with your messaging service.

Danielle Smith

Back Messages Contacts Make Call Danielle Smith

Groups Call Settings Message Settings Notifications Reminders

Notifications Clear List New Entry Apply Cancel

▼ **Message Waiting Indicator**

☒ Send phone notification of incoming messages to the following phone numbers

Phone Number	Urgent Voicemail	All Voicemail	
(267) 293 4035	<input type="checkbox"/>	<input checked="" type="checkbox"/>	✕

View Account Settings

Open in New Window Close

The *Message Waiting Indicator* section allows you to manage what voicemails or faxes trigger a notification to the account. In most cases, the “All Voicemail” box should be checked.

3.1.1.3.5 Reminders

Reminder calls may be configured to call the phone associated with the account at designated times. The system will call the phone at those designated times. When the call is answered, the system will simply say “This is your reminder call”.

Danielle Smith

Back Messages Contacts Make Call Danielle Smith

Groups Call Settings Message Settings Notifications Reminders

Reminders Clear List Apply Cancel

Occurs	Time
You have no reminders.	

New Reminder

You can configure reminders either to occur once in the next 24 hours, or to repeat daily or weekly.

Occurs: Select ▼

Time: 9 : 30 am ▼

Add

View Account Settings

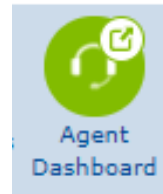
Open in New Window Close

Active reminder calls show up in the left side pane. To add a reminder call:

- Choose the frequency of the call in the **Occurs** field
- Specify the time in the **Time** field
- Click the **Add** button
- Click the **Apply** button

3.1.1.3.6 Agent Dashboard

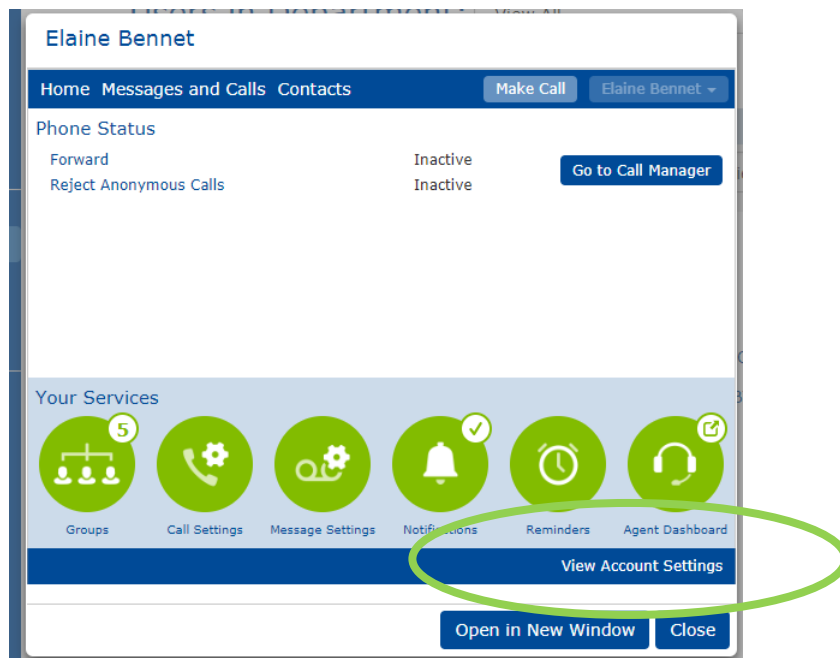
If the user is a member of an ACD Hunt Group for call center purposes, they will have access to an agent dashboard that gives more visibility and access to features for use as an agent. Call center agents can access this via the *User CommPortal*, but administrators may use this dashboard to manipulate agent settings in the Agent Dashboard section of the *Administrator CommPortal*.



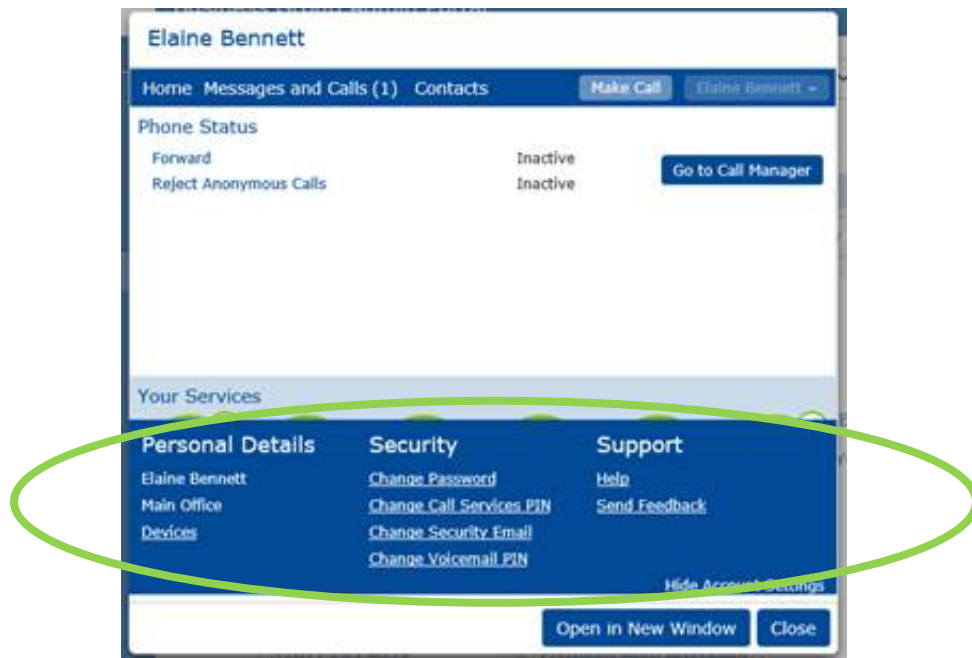
For more information on call centers and agent usage of this section, please see the associated *Integrated ACD Agent Guide*.

3.1.1.4 View Account Settings

Additional setting for the line can be found by clicking *View Account Settings*.



When this is selected, the account settings menu slides up as shown:



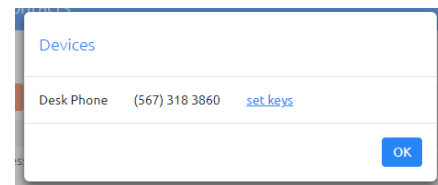
Personal Details

The *Personal Details* section shows the line name and, if applicable, the associated department.

When *Devices* is selected, the desk phone numbers and efax associated with the account will appear in a popup box.

If a phone set is associated with the line, the *Set Keys* link gives access to modifying any available keys on the phone set.

Administrators can make changes to all phones by accessing the Phones section (see section 3.4 for more details).



Security

The bottom toolbar gives access to various account Security options.

- **Change Password**- modify the CommPortal password

To access the user or administrator CommPortal, an account password is required. To change this password, click **Change Password** in the Security section, then enter the new password twice before clicking **Confirm**.

If the update is completed, you will receive the following notice:

Your password has been changed successfully!

OK

CommPortal account passwords must be 12-20 characters total. It must include at least 1 number, 1 special character and cannot emulate the phone number or have sequential characters. Additionally, you will periodically have to update your CommPortal PIN in which case you will see the following reminder upon logging in:



Please change your password.

Your password has expired. Please change your password.

Old password:

New password:

Confirm new password:

[Change Password](#)

If you have forgotten your password, please contact customer support.

The password must:

Be between 12 and 20 characters long.
Have at least 1 digit.
Have at least 1 special character.
Not be a numeric sequence, e.g. 12345 or 54321.
Not contain, or match part of, a telephone number associated with this account.

OK

- **Change Call Services PIN-** modify your remote call services password

The Call Services PIN is a PIN used to manage remote call forwarding. Remote call forward allows the user to forward their dial number from any phone. The default PIN for this feature is the last four digits of the direct dial number. For example, if the direct dial number is 555-888-1234, the default call services PIN is 1234.

When enabled, this type of forwarding functions the same as the *Immediate Forwarding* (see section 3.1.1.1). When activated via the remote call forwarding directions below, the number that has been activated will show up in that section.

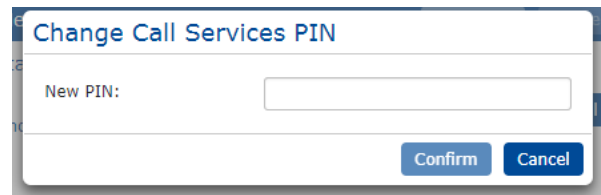
To use remote call forwarding:

- **Call** 866-963-5666
- **Enter** the ten digit direct number followed by #.
- **Enter** the four digit Call Services PIN followed by #.
- **Enter** the feature code to activate.
 - If you are activating forwarding, dial *72 plus the ten digit number to forward calls to.
 - If you are deactivating forwarding, dial *73.

- You will hear a tone once forwarding is activated to confirm the activation is complete.

To change the Call Services PIN:

- Click the **Change Call Services PIN** in the bottom toolbar.
- **Enter** your new desired PIN in the New PIN field.
- Click the **Confirm** button.



- **Change Security Email**- modify the user's account email used for password resets

To access the user commportal and other account applications, an application password is required. The *Change Security Email* field allows an email address to be linked to the account in case a password reset is needed. This allows users to reset their own password using the *Forgotten Password?* link on the login screen to change their password as opposed to contacting their system administrator for assistance.

This is a required field if 1) the user logs into their user commportal *or* 2) if the user wants the capability to reset their own password for any reason. Please note that if this field is not populated and the user logs into the user commportal with their correct credentials, they will be prompted to add the email themselves.

To change the account's Security Email, click **Change Security Email** in the *Security* section, enter the new email address, then click **Confirm**.

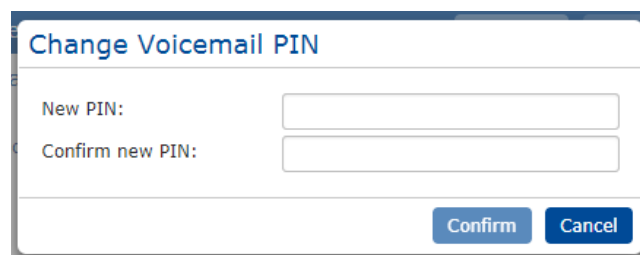
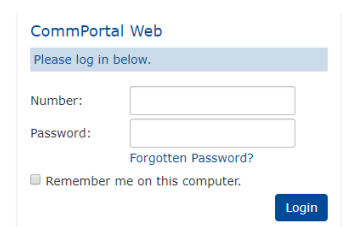
A confirmation will appear:



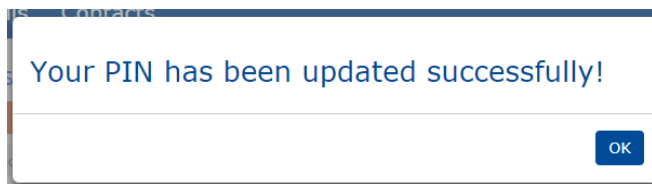
Be sure that the *@telesystem.us* sender is marked as 'safe' on the email server receiving these emails to ensure all users get the phone system emails.

- **Change Voicemail PIN**- modify the line's voicemail password

To access voicemail, a voicemail PIN (password) is required. To change this, click **Change Voicemail PIN** in the *Security* section, **enter** the current and new PIN, then click **Confirm**.

If the update is completed, you will receive the following notice:



Voicemail PINs must be 4-20 digits long depending on the type of services on the account.

Support

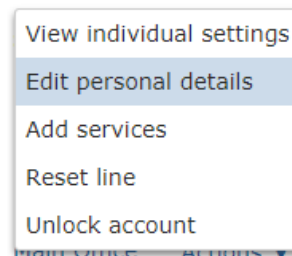
The Support section of the lower toolbar offers basic ways to get assistance on navigating the portal and access to any available downloads

The *Help* link will trigger another browser window to open with assistance for basic features and functionality of the portal.

The *Downloads* link shows any/all applications the user may download for their service. These are all available to download from the User CommPortal as well. Applications may include the UC-MaX Softphone and CommPortal Assistant. Please refer to the *User CommPortal Guide* for more information about each of the applications.

3.1.2 Edit Personal Details

The *Edit Personal Details* option is available in the *Actions* drop down, the administrator can launch this section to make a line name change and to add or remove administrative privileges.



To change a line name:

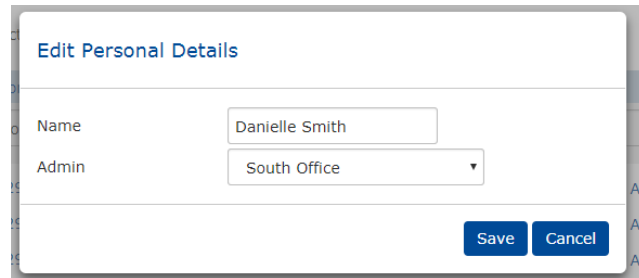
- Navigate to the **User** section
- Click the *Actions* drop down next to the user's line then choose **Edit Personal Details**
- Change the name in the *Name* field
- Click **Save**

Depending on the setup of your system, there may be other areas in which the administrator will be updating the name. See section 7 for a consolidated list of possible changes.


Administrators can also modify administrative privileges for lines. This allows you to modify who has access to the Administrator CommPortal interface.

To add or remove Administrator rights on a line:

- Navigate to the **User** section
- Click the *Actions* drop down next to the user's line then choose **Edit Personal Details**
- Chose the type of administrator rights you wish to allocate to this line (see below for more info)
- Click **Save**



System administrators may be **root** administrators (with full access to all sites), **department** administrators (with only access to their own department lines), or not an administrator at all.

Users with administration rights show in the User section with  next to their name.

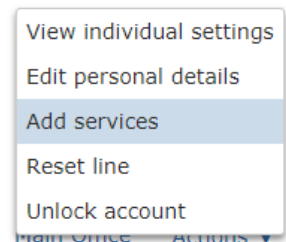
3.1.3 Add Services

The *Add Services* option is available in the *Actions* drop down. This section can be used to add additional features to the line.

The available features here will be based on the current service and will not incur additional cost if activated. Should you need to modify the type of service, please contact Telesystem.

Services available here may include:

- **Call Blocking-** Prevent certain types of calls being made from the phone, for example expensive international or premium-rate calls.
- **Reminders-** This service allows you to configure a phone to ring at a certain time (similar to a hotel wake-up call).
- **Account Codes-** Require a code for certain types of calls being made from the phone, for example expensive international or premium-rate calls. Administrators can activate this on the whole business group level instead of per phone (see section 4.3).
- **Priority Call-** This service distinguishes calls from certain callers by ringing your phone with a distinctive ringing sound.
- **Unavailable Forwarding-** This service forwards callers to an alternate destination of your choice if your phone line is not available for some reason (e.g. it is unplugged or loses power).

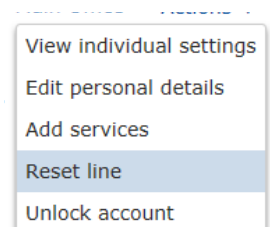


To add services to a line:

- Navigate to the **User** section
- Click the *Actions* drop down next to the user's line then choose **Add Services**
- Click the service name you want to add in the list of available services on the left
- Click **Sign Me Up** in the left pane

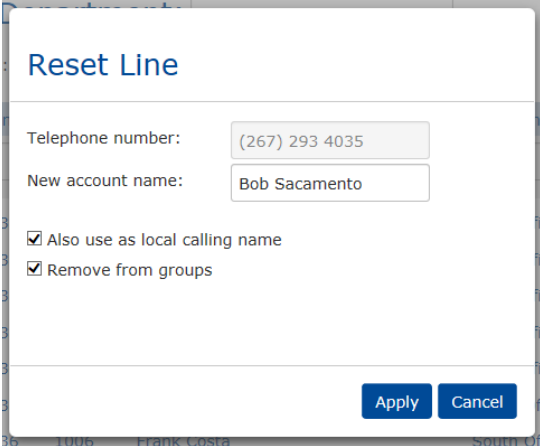
3.1.4 Reset Line

Resetting a user's account is an efficient way to wipe out many of the settings from a former line. This is useful when reallocating a phone to a new user since the administrator can change the line name, reset voicemail, and more in one simple process.



To reset a user's account:

- Navigate to the **User** section
- Click the **Actions** drop down next to the user's line then choose **Reset Line**
- The Reset Line screen will open to confirm the telephone number and show settings you may manage:
 - If you would like to rename the line, input a line name in the *New account name* field.
 - If you would like to make the local name the same as the line name (most common), leave the checkmark in the *Also use as local calling name* field.
 - If you would like to remove this user from any any Multi Line Hunt Groups, Sim-Ring, or Call Pickup Groups, leave the checkmark in the *Remove from groups* field
- Click **Apply**
- Click **Confirm** on the next screen to put settings into effect.
- The new user details will appear on the screen. Click **OK** to go back to the normal view.
 - *You will notice that the Account Password/Voicemail PIN are very long. These can be set by the administrator, but if the user is a phone user, their phone will require them to initialize their account the first time they access voicemail.*



Resetting the users account will cover many of the changes needed when a phone is reallocated to a new employee, but not all. Please refer to the lists below to remember what the Reset Account option will and will not accomplish

Resetting a user's account WILL:

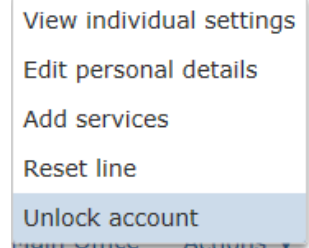
- Change the line and intercom name at the same time or will leave both blank (see instructions)
- Change the voicemail password (see instructions above)
- Delete any voicemails and/or faxes
- Reset the voicemail notification settings to the default (phone and portal notification only) so that the user will have to set up their voicemail account
- Remove any recorded greetings/name for the voicemail system
- Remove administration privileges
- Remove user from all Multi Line Hunt Groups (MLHG) or Multi Appearance Directory Number (MADN) ring groups
- Reset (remove) immediate forwarding settings.
- Remove the user *security email*

Resetting a user's account will NOT:

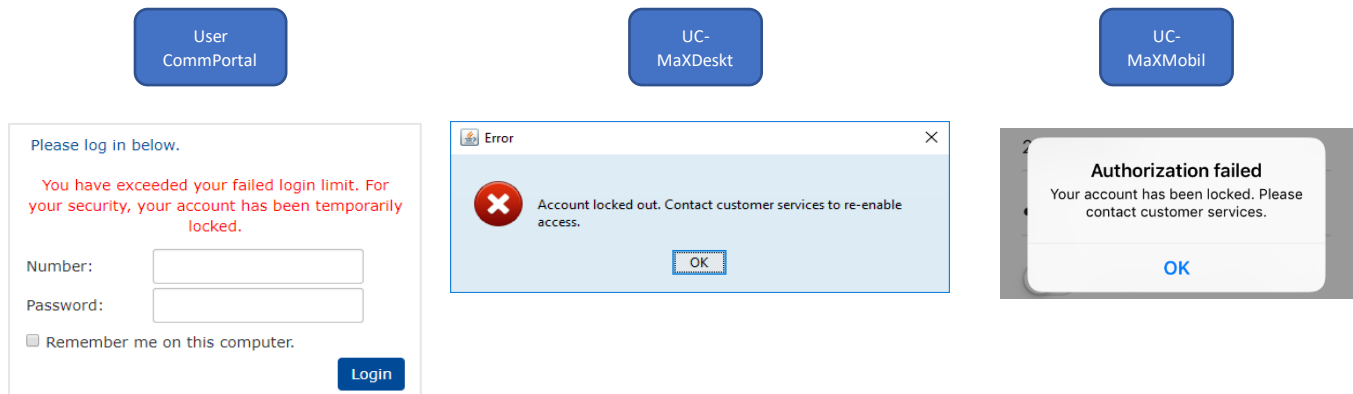
- Reset (remove) all personal Call Manager settings (see section 3.1.1.1)
- Reset all programmed buttons to the default phone layout (see section 3.4)
- Remove the user from a call flow's Incoming Call Manager (ICM) rule
- Rerecord ore remove the auto attendant extension name recording from an n-series auto attendant(directory) (see section 5.4.8)
- Change the phone (MAC) name see section 3.4)
- Change the extension see section 4.4)

3.1.5 Unlock Account

Each line in the account has its own account password that is used for CommPortal login and the UC-MaXApplication. If a user tries to log in with an incorrect password to these applications too many times, the account will be locked as a security precaution.

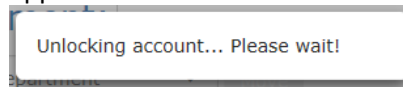


Users will receive a notification when their account has been locked as follows:



To unlock a user's account:

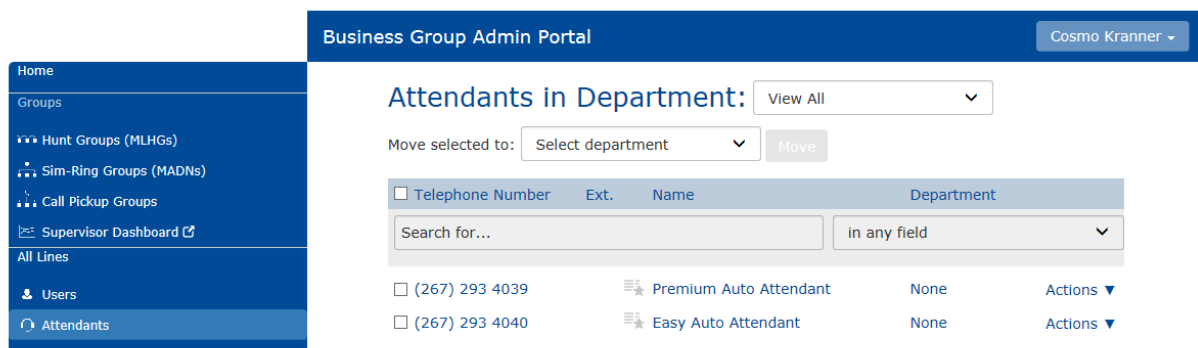
- Navigate to the **User** section
- Click the *Actions* drop down next to the user's line then choose **Unlock Account**
- The following message will appear while the account is unlocked:



Since unlocking the account does not change the password, in most cases the administrator will need to follow the instructions for changing the password after the account has been unlocked (section 3.1.1.4).

3.2 Attendants

The *Attendants* section displays any lines configured with the *Premium Attendant* service.



This section does not include information on any N Series Auto Attendants services. For more information about all attendants, please refer to section 5 which discusses each types of attendants and the management of each.

3.3 Group Access

The *Groups* section displays any lines configured as Sim-Ring or Hunt Group lines and gives quick access to each by clicking on the line or using the *Actions* menu. This section may be filtered by department using the top drop-down.

Administrators can manage these in the Groups section. Please refer to section 2 for more information on Groups.

3.4 Phones

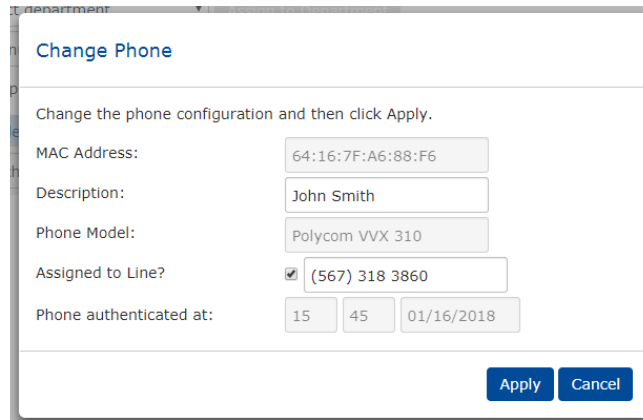
The *Phones* section details all phone sets in your group. Like other sections, it can be filtered by department using the drop down list at the top of the screen. To search for a specific phone in this view, you may use the “*Search for...*” box near the top of the phone list.

If you need to add a new phone to your group, please contact Telesystem to fulfill this request. A new phone will be configured with all the necessary information and in most cases, shipped directly to the site.

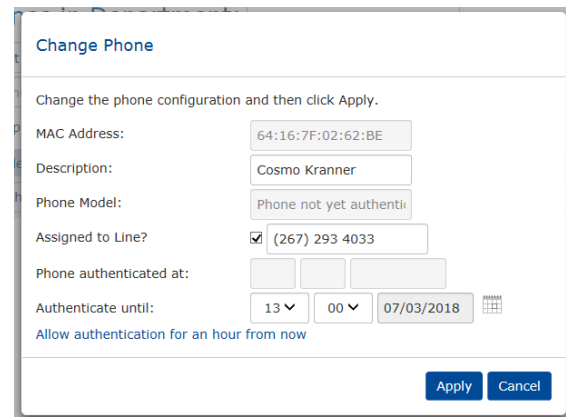
3.4.1 Change Phone

While in the primary phone view, all phones will appear for the business or department you are viewing. If you click on the phone information (MAC address, Description, or Telephone number) or chose “change phone” from the Actions drop down, a popup box will appear with additional

information about the device. An explanation about the information in this section is below. Be sure to **Apply** any changes made.



- **MAC Address:** This *media access control* (MAC) address is a unique identifier assigned to each phone by the manufacturer and will show on the back of the physical phone set. This may not be modified.
- **Description:** Each device may be named. In most cases, the device name matches the line name and thus should be updated when line names are updated or reset (see sections 3.1.2 or 3.1.4). This field may be modified in this section.
- **Phone Model:** The appropriate phone model for the device.
- **Assigned to Line?** If the device has been assigned to a telephone number, the number will appear here. A line must be assigned to a line in order to work properly, however the administrator can modify which line it is assigned by modifying the telephone number in this field. Proceed with caution, however, as assigning a new line requires that the phone be re-authenticated (see next point for information on this).
- **Phone authenticated at:** Newer model phones require phones to be securely authenticated back to the server. This field shows the time and date that the phone was initially authenticated. If for any reason a phone must be re-authenticated, the administrator can re-open the window of time. For example, if the assigned line number changes, the phone will need to be rebooted within the time allocated here (see to the right). Please contact Telesystem with any issues on reauthenticating phones as certain changes may require assistance.



3.4.2 Phone Profiles

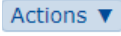

A phone *profile* provides the configuration for the phones that are associated with that particular phone. The most common configuration change is to the buttons of the phone.

Each business department has a group level (parent) profile for each phone type and each phone has its own (child) profile. During the implementation of the system, Telesystem does the initial setup and phone configuration. After that point, users and administrators can make changes as necessary.

The Phones section *Actions* menu also allows the administrator to configure a phone's individual profile.

3.4.2.1 Individual (Child) Profile

To manage the individual profile for a phone:


- In the **Phones** view, find the desired phone then click  then choose **Configure Phone**
- This launches a new window for the Phone Profile Editor. Click the **Edit** button  to begin configuring the phone keys.

All modifications done on this level are valid only for that individual's phone. Section 3.4.3 explains some of the available features to add at this level.

3.4.2.2 Group (Parent) Profile

You can make changes to individual phones or the group level profile for all phones.

To manage the group profile for a phone type:

- In the **Phones** view, filter to the desired department or site you wish to manage.
- Click **manage your phone profiles** link at the top of the page.
- This launches a new window for the Phone Profile Editor that shows all current phone profiles in that group. Choose the phone type you wish to modify then click the **Edit** button  to begin configuring the phone keys.

All modifications done on this level will be implemented to all phones subscribing to this parent profile. Section 3.4.3 explains some of the available features to add at this level.

3.4.3 Configuring Programmable Keys

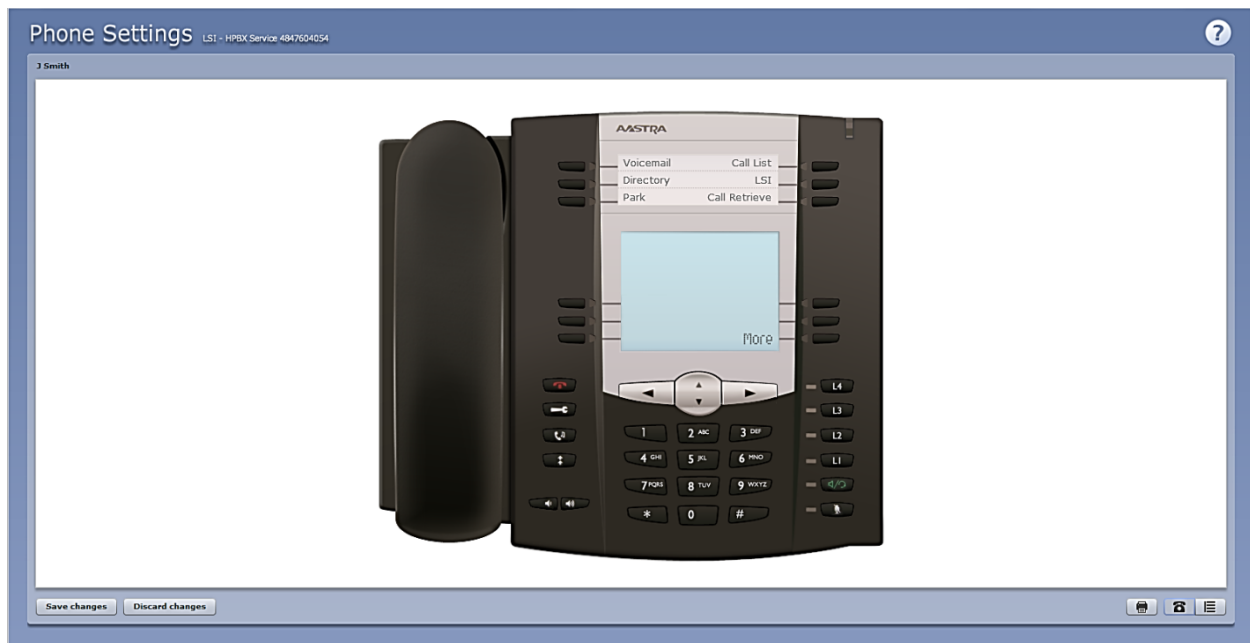
The Administrator may make changes on either profile level (individual or group). The phone configuration tool that displays will differ based on the phone model being modified. The tool used will either be the *Built In* or *End Point Pack* tool. Associated models and instructions on both methods are explained below.

- Refer to the *Built In* configuration if you have:
 - All Aastra (Mitel) 6700 series phones (6753i, 6737i, 6755i, 6757i, 6739i)
 - All Polycom Soundpoints (450, 550, 650, 6000)
- Refer to the *Endpoint Pack* configuration if you have:
 - All Aastra (Mitel) 6800 series phones (6863i, 6865i, 6867i, 6869i, 6873i)
 - All Polycom VVX phones (3xx, 4xx, 5xx, 6xx)
 - All Yealink phones (T42x, T46x, T48x)

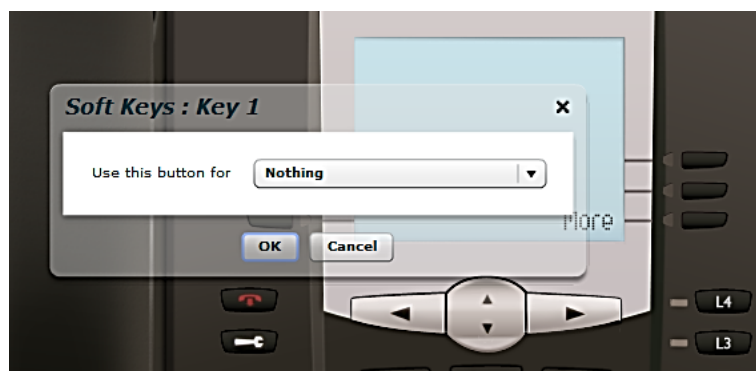
3.4.3.1 Programming Available Keys: Built In Method

Configuration of *Built In* phones must have a current version of Adobe Flash Player installed in order to use this portion of the portal.

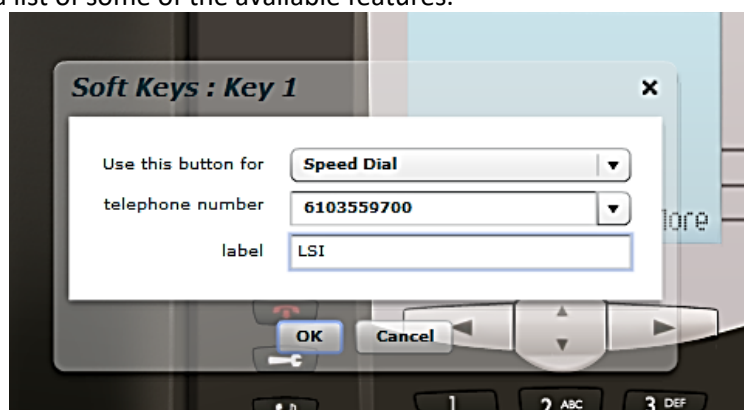
The example in this document shows an Aastra 6755i phone. Your phone make and/or model may differ from the one shown and thus the available features may differ as well.



If your phone model has programmable keys as the model shown, you can easily configure those buttons to be more useful. Select a key by clicking on it. A programmable key will show a **blue** glow around it when you hover the cursor over it. A non-programmable key will show a **red** glow when the cursor is hovered over it. Clicking on a programmable key will launch a pop-up allowing you to configure the key as follows:



Use the drop-down list to select the operation that key should perform and configure. See the *Key Options* section for a list of some of the available features.



When this is done, the picture of your phone will be updated to reflect the label given to your new key assignment:



When finished, press the **Save Changes** button at the bottom left of the screen. Your phone will update with these changes you have made overnight. Alternately, you may manually reboot your phone to see these changes immediately.

3.4.3.2 Programming Available Keys: End Point Pack Method

The example in this document shows an Aastra 6867i phone. Your phone make and/or model may differ from the one shown and thus the available features may differ as well.



In many cases, some keys have already been programmed by Telesystem prior to the phones being implemented, however you may have additional keys available to program. The table on the right side of the screen shown above shows several sections of programmable keys. Expand or collapse one or all sections by clicking on the title arrows ➤.

To decipher which keys are which, you may click on the group of keys to the left as shown below:



When the keys shown above were selected, the right table automatically opens up to the proper section. In this case, the *Programmable Keys- Top* section opens as shown below.

To program a key, choose the desired key from the list, assign it an action, fill in the details, then save as detailed below. In the example below, we will program the fourth key to be a speed dial.

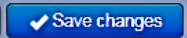
Programming a key (End Point Pack):

- Select the desired key

- Select the appropriate Soft key action from the drop down

- If programming a monitored extension or speed dial, input the appropriate label and number. Please note that the "line" field should always be Line 1 as shown below unless your other lines are set up as alternate identities you wish to use.

▼Key 4		Line Systems
*Soft key action	Speed Dial <input type="checkbox"/>	
Line	Line 1 <input type="checkbox"/>	
*Number	8888086111	
*Label	Line Systems	

- Click the Save Changes button . Your phone will update with these changes you have made overnight. Alternately, you may manually reboot your phone to see these changes immediately.

3.4.4 Key Options

The most commonly used key functions are *speed dial* and *monitored extension*, however when programming you will find that there are more options available to you. While configuring the buttons, the drop down menu may include some or all of the following features depending on your current phone model and firmware.

- **Nothing**- This is used when a key is assigned no function.
- **Speed Dial**- Dials a specific telephone number when pressed.
- **Enhanced Speed Dial**- Dials a specific telephone number when pressed. Also allows the user to perform a one- press transfer that that phone number. Mitel (Aastra) only.
- **One Touch Transfer**- Also allows the user to perform a one- press transfer that that phone number. Polycom VVX only.
- **Speed Dial/Conference**- Initiates a three-way conference call with a specific phone number.
- **Do Not Disturb**- Configures a key for the Do Not Disturb service.
- **Monitored Extension**- Acts as a speed dial to an internal extension when pressed. Depending on phone model, the key will be lit appropriately when that extension is already on a call, in do not disturb, ringing, or available.
- **Enhanced Monitored Extension**- Acts as a speed dial to an internal extension when pressed. Depending on phone model, the key will be lit appropriately when that extension is already on a call, in do not disturb, ringing, or available. Also allows the user to perform a one- press transfer.
- **Enhanced Call Park**- Will park, show, and retrieve a parked call (see below for further explanation on call park).
- **Park Call**- Parks a call (see below for further explanation on call park).
- **Retrieve Parked Call**- Retrieves a parked call (see below for further explanation on call park).
- **Call List**- This key will show you a list inbound calls to the phone that includes both answered and missed calls. It stores up to 200 entries before beginning to remove the oldest entries.
- **Directory**- Configures a key to provide a phone list of the business group extensions. The native phone directory for most phones stores up to 200 extension entries, however other directories may be available.
- **Intercom**- Allows you to initiate an intercom call. Intercom calls require the receiving phone to auto-answer in most cases.
- **Voicemail**- This key acts as a speed dial to the voicemail system.
- **Group Pickup**- This key is a speed dial for the group pickup service (see below for further explanation). This does not make your phone ring simultaneously with the other group members.

- **Directed Pickup**- This key is a speed dial configured to pick up calls ringing to a particular extension (see section below for further explanation). This does not make your phone ring simultaneously with the other extension.

Keep in mind that some of these features may not be available or enabled on your system depending on the model phone you have. If you have questions about these or additional features, please contact your system administrator.

3.4.4.1 Further Feature Explanation

Enhanced Monitored Extension/Speed Dial

Both the Monitored Extension and Speed Dial features may allow you to choose their “enhanced” version (depending on which phone model is in use). Doing so allows the user to perform a one-press transfer to the button’s destination number or extension. Live calls may be transferred directly to an extension or phone number programmed by simply pressing the button. This is a time-saving feature for high volume reception persons if they normally perform unannounced transfers.

Mitel 6800 series phones allow users to enable a ring splash when their monitored extensions ring (see example below). The ring splash is a short ring that will alert the phone user that the other extension is receiving the call. The enhanced monitored extension button can then be pressed to retrieve that ringing call.

▼Key 2 Joe	
*Soft key action	Enhanced Monitored Extension ▼
Line	Line 1 ▼
*Extension	4121
*Ring Splash Override ⓘ	No ring splash ▼
*Label	Joe

Polycom VVX 5.7 firmware and higher allow you to choose whether to download the user name automatically or type it in yourself (see below) for your monitored extensions. If you choose to use the system name, this will use the intercom name. If there is no intercom name (section 3.1.1.3.2), this will show the direct dial phone number. In the example below, the extension for 6103464131 will be monitored on the sixth key of the phone. The phone label will automatically show the intercom name programmed for that line (or, if none is programmed, the phone number will show).

▼ Key 6	
Soft key action	Enhanced Monitored Extension <input checked="" type="checkbox"/>
Extension	6103464131
Use Subscriber Name as Label ⓘ	<input checked="" type="radio"/> Yes - Requires the subscriber's full DN as the extension to monitor <input type="radio"/> No
Label	

Enhanced Call Park

Enhanced Call Park may be configured in a variety of ways depending on the system you have. This function is used as a type of ‘group hold’. It may be used to put your caller in a virtual holding place (park orbit) then retrieved from any phone simply by pressing the call park button. The Call Park

function must be set up initially by Telesystem. If you are interested in adding this feature, please see your system administrator and they will reach out the Telesystem to see if your system is compatible.

Group Pickup


Your administrator may put your phone and others in a call pickup group, allowing you and the other members to answer each other's phones if you hear them ring. If this group is pre-arranged, the members may answer the other phone's calls by dialing *11 or by utilizing a Group Pickup function key. For more information concerning the setup of call pickup groups, please see section 2.3.

Directed Pickup

If available, the Directed Pickup option will allow you to answer another person's phone when you hear it ringing. The access code to use this is *12 plus the extension. Alternately, you may configure a Directed Pickup button on an available key using your CommPortal. When configured, you can press this button to answer another person's phone if you hear their phone ringing.

3.4.5 Advanced Configuration

Both the *Built In* and the *End Point Pack* configuration tool allow the administrator to make more advanced modifications in its table sections. Since these sections include important IP and SIP configuration options, please make changes with caution. If you have any questions, please do not hesitate to contact Telesystem for assistance.

Built In deployments will view the table by clicking on the table icon  on the bottom of the portal. End Point Pack deployments view these configuration settings in the sections on their main screen.

Below are some of the more common, advanced changes. These may be made on the individual or group levels of the Table View. Be sure to click the Save Changes button on the bottom of the profile in order to save changes. Most changes will be saved and update on the phone(s) overnight. Again, please proceed with caution using the Table view since much of the unique network configuration for the phones is stored here. If you have questions, please contact Telesystem for assistance.

User-Call Services- Mute Microphone/Intercom Mic Mute

This option is associated with the Intercom feature on Mitel (Aastra) phone sets. When "Yes" is selected, the recipient of the intercom will receive the intercom message, but their phone will automatically be on mute. If "No" is selected, the recipient of the intercom will not be muted when the intercom conversation begins.

User-Call Services-Automatic Answer

This option is associated with the Intercom feature on Polycom VVX phone sets. When "No" is selected, the recipient of an intercom will receive the intercom messages immediately. Their phone will not be on mute. If "No" is selected, the recipient's phone will ring with the incoming call instead of automatically answering it.

User-Call Services-Call Waiting Tone

When selected, users will hear a call waiting beep when receiving an incoming call while already on a call. When not selected, no beep will be heard (the call will still come through).

User-Call Services/Preferences-Missed Call Indicator

When "Yes" is selected, users' phones will display a notification (ex: "1 missed call") if they have missed any calls. This notification will remain on their phone display until the call log is accessed. When "No" is

selected, the notification will not appear on the phone display, however calls will still be listed in the call log.

User-Preferences-Switch Focus to Ringing Line

This applies only to Mitel (Aastra) phone sets. When selected, the phone will always switch its display to show the newest incoming call. This means that if a user is already on a phone call or in the middle of performing a transfer, the new call will ring in and the whole display will show that information. Because the screen changes (switches focus to the ringing line), the user cannot transfer the current call. They must either ignore the new call or put the current call on hold to answer it. To keep the phone from switching focus, be sure to make sure this is not selected. It is common for reception or high call volume users *not* to have this selected, but for normal office workers to have it selected.

4 Services

The *Services* section gives the administrator access to additional business group services such as departments, account codes, and more.

4.1 Departments

The Departments section shows you information about any of your group's current departments. In most cases, Telesystem will section multiple sites into their own departments upon initial implementation.

To view the Departments, click the **Departments** link in the Services section of the left pane of the Administrator portal.

This section may allow you to allocate an **operator number** to each department. An operator number allows for a "zero out" option of voicemail.

For example, if someone calls a user in the Main Office department pictured below and gets to one of their voicemail boxes, the caller may press 0 during the voicemail message to be transferred to extension 1001. The operator number may be an extension or a ten digit phone number. This feature is primarily used to redirect callers back to the main telephone number or reception extension.

Business Group Admin Portal Cosmo Kranner

Departments

Departments divide your Business Group into separately-administrable groups.
To edit or delete a department, click on the department in the tree view below.

[Add Department](#)

Count of departments: 2

Department Name	Operator Number			
Main Office	1001	-	-	-
South Office	1006	-	-	-

To Add a Department:

- Click the **Add Department** button.

- Enter the **name** for the new Department.
- Enter the desired **operator number** for the department.
- Click **Add**.

To modify an existing Department:

- Click department name you wish to modify.
- Modify the name or operator number.
- Click **Apply**.

4.2 Short Codes

Short codes are group-wide speed dials that may be used from any of your group's phones to access an internal or external phone number or access code. To view the short codes in your group, click on the Short Codes link in the pane to the left of your administrator screen.

Please note that short codes may not conflict with your current extensions, access codes, 911, or 411. They may include the # and * signs and be 1-7 characters in length.

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Short Codes in Department: View All

Short codes allow your users to quickly dial common numbers. The table below shows the short codes currently in operation in the selected department.

Move selected to: Select department Move

Delete Selected Add Add Range

<input type="checkbox"/> Short Code	Telephone Number or Service Access Code	Department
<input type="checkbox"/> #100	(888) 808 6111	None
<input type="checkbox"/> #200	(419) 724 9898	None

To add a new short code:

- Click **Add**
- Enter the **Short Code number** to be assigned.
- Enter the **telephone number** the Short Code should dial when accessed.
- Click **Add**

To delete a short code:

- **Select** the code to remove using the check box to the left of the Short Code
- Click the **Delete Selected** button

To modify an existing short code:

- Click either the Short Code or telephone number for the code
- Modify the details in the popup window
- Click **Save**

4.3 Account Codes

Account Codes, when active, place limits on outbound dialing. Putting these into place may be done on the group or the individual level. To view the group Account Codes, click the **Account Codes** link in the pane to the left of your administrator screen. Changes in this view will be active for all phones in your group unless a particular exception has been placed on a user's line.

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

15587711	Elaine Benett
15935711	Jerry Stein
25735711	George Costa

4.3.1 Modifying Call Types Requiring Account Codes

Use the check boxes to specify which types of calls will require Account Codes. A box that is check marked will require an account code if this service is activated. Any changes you make should be followed by clicking the *Apply* button.

- **International** – Whether account codes are required for calling international numbers. Please note that Telesystem disables international calls unless you explicitly request it.
- **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.
- **National** – Whether account codes are required for long distance 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 calls to other numbers within your business required account codes if they are local calls. 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 calls to other numbers within your business require account codes if they are not local calls.

4.3.2 Choosing Validated or Unvalidated Account Codes

When this service is active, a non-validated Account Code requires the caller to input a code of a valid length. A validated code requires the caller to input a code of the correct length from a prearranged list.

When the '*Use validated account codes*' box is check marked, the only codes allowed are those that are listed in the side pane. When this box is left un-checked, un-validated codes will be accepted.

4.3.3 Setting Account Code Length

To specify the default length that should be used for account codes:

- In the Account Codes section, **enter** the length of the code in the text box field "Account code length".
- Click **Apply**.

4.3.4 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 for security purposes.

To change the number of incorrect entries the user is allowed:

- In the Account Codes section, **enter** the desired value in the "Max *incorrect attempts before account is blocked*" field.
- Click **Apply**.

4.3.5 Setting Individual Line Properties

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

- 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 the account codes to be changed for each line, check "Account code length may be overridden per line".
- To allow individuals to view the account codes that you have defined for the whole business in their individual Portals, check "Lines may view business group account codes".
- To set whether each line should be able to view, change, or both view and change their own account codes via their individual Portal, select the appropriate option from the dropdown list at the bottom of the Account Code Options section.
- If you want to configure codes on a per line basis, you may do so by logging into the user's personal account via your administrator Portal. See section 3.1.3 for instruction on how to do this.
- Once you have made all of your changes, click the **Apply** button to save them.

4.3.6 Configuring Validated Account Codes

If you are using validated account codes, you may modify the list of available codes by doing the following:

- In the Account Codes section, click **Edit List**
- To **add** an account code:
 - **Enter** the code in the Account code text box.
 - **Enter** the description in the Description text box.
 - Click on **Add**.
- To **remove** an account code, click on the ✕ icon to the right of the account code.
- To **change** the description of an account code, remove it then re-add it with the new description.
- When all changes have been made, click **OK**.
- To save changes, click **Apply**.

4.3.7 Managing Account Code Settings Per Line

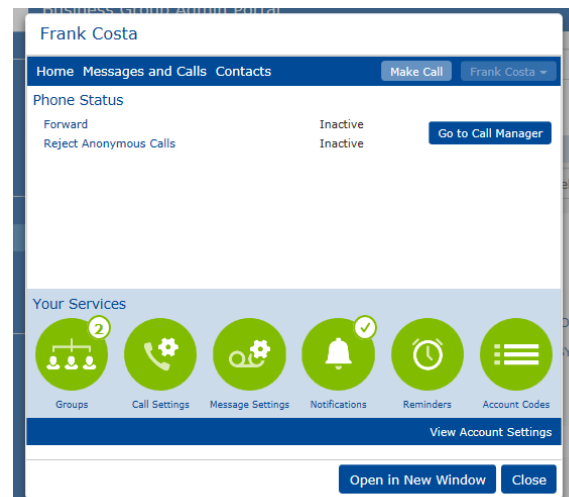
The account code settings may be added or overridden on a per line basis. For example, if you only want to restrict calling on a common area phone, you may add account codes to that phone only using the guidance below.

To enable codes per user:

- Navigate to the **Users** section
- Click on the **Actions** drop down by the user you wish to modify
- Choose **Add Services** from the list
- Select the **Account Codes** link in the left pane
- Click on **Sign Me Up** button in the right pane. When prompted, select “**Yes**” to add the service.

To add, view, or modify the account code settings per line after they are already enabled:

- Navigate to the **Users** section
- Click on the **Actions** drop down by the user you wish to modify
- Choose **View Individual Settings** from the list
- Choose the **Account Codes** option in the *Your Services* section.
- To add codes, click **Edit Personal Account Codes** and otherwise modify the user’s individual settings described in the previous account codes sections.



4.4 Extensions

The Extensions view lists all of the extensions that are part of the group you administer. To view the Extensions, click the **Extensions** link in the pane to the left of your administrator screen. From this view you may add, remove, and modify extensions in your group.

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Extensions

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 7.

Delete Selected

Add Range

Add

Count of extensions: 7

<input type="checkbox"/> Ext.	Telephone Number
Search for...	
<input type="checkbox"/> 1001	(267) 293 4031
<input type="checkbox"/> 1002	(267) 293 4032
<input type="checkbox"/> 1003	(267) 293 4033
<input type="checkbox"/> 1004	(267) 293 4034
<input type="checkbox"/> 1005	(267) 293 4035
<input type="checkbox"/> 1006	(267) 293 4036
<input type="checkbox"/> 34041 - 34045	(267) 293 4041 - (267) 293 4045

To create a new extension:

- Click **Add**
- **Enter** the Extension number
- **Enter** the telephone number of the line in your business group that the new extension should map to. Each line may only be assigned one extension and each extension may only be used once
- Click **Add**.

To modify an existing extension:

- **Click** the extension number or the phone number associated with the extension
- **Modify** the extension number
- Click on **Save**

To remove an extension:

- **Select** an extension using the check box to the left of the extension
- Click on the **Delete Selected** button

4.5 Call Logs

The Call Logs section allows you to download a .csv report of all calls to or from lines within your business group. To access the Call Logs section, click on the **Call Logs** link in pane to the left of your administrator screen.

Call Logs are retained for up to 120 days and may be retrieved in up to 30 day increments.

To download a report:

- **Select** a start date either by clicking on the calendar icon and choosing from the calendar, or by typing in the month, day, and year fields.
- Optionally select the end date in the same way as above. If no end date is specified, all calls up to the present are included in the report.
- If you administer several departments, you may also choose to narrow down your results by department using the drop down box near the bottom of the page.
- Click **Download**. Depending on the size of the report, this may take some time.
- Choose whether you would like to open or save the report file.

When the report has been downloaded, you may open the .csv file in Microsoft Excel. From there you can manipulate the data as necessary. The report includes the following fields:

- Date and time of the call.
- Type of call (*inter* business group, *originating* from your business group, or *terminating* to your business group).
- The calling number and its extension and department (if applicable).
- The called number and its extension and department (if applicable).
- Whether the call was answered.
- The length of the call.
- Any account or carrier codes used to make the call.

4.6 Music on Hold

Music on hold is an audio file that is played while your callers are on hold, parked, or queued in a call center. To access this section, click the Music On Hold section in the left pane of the administrator portal.

4.6.1 Logging In

To log into the Music On Hold system, click the Music On Hold section link at the bottom of the left pane of your administrator CommPortal. This opens up a new browser window for the Music On Hold administration system.

Music On Hold Mappings in department: LSI - Lab Second Floor - EndPoint Packs (root)

[security](#) [mappings](#) [resources](#)

Directory number	Initial resource	Action	Follow-up resource	Start Point	Duration	Actions
Default	Global 10 - Classical	Repeat		Start		Edit
610-346-4129 ▼	None ▼	Repeat ▼		Start ▼		Add

2 of 20 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: [Department 1](#) [Department 2](#)

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 system.

- **Security**- View and configure your security settings.
- **Mappings**- Configure different recordings to be played when different lines within your business put callers on hold.
- **Resources**- 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 full access administrators can manage recordings.

4.6.2 Viewing and Changing Security Settings

To view your security settings, select the Security section.

Music On Hold

[security](#) [mappings](#) [resources](#)

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

[Apply](#)

In addition to accessing the Music On Hold system using the 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 the password for the Music on Hold Telephone Interface:

- **Enter** the new password in the text box.
- Click on **Apply**.

4.6.3 Managing Recordings

By default, new accounts are set up with either none or to the default music on hold. Telesystem also offers customer Music on Hold feature, which allows you to upload customized music on hold to your account. If you are interested in adding this, please contact Telesystem for details. For an account that

has custom music on hold available, it is possible to upload the recording files to the Resources tab section. To access that section, click on the Resources tab at the top of the Music on Hold page.

The screenshot shows the 'Music On Hold' interface with the 'resources' tab selected. It features a 'Global Media List' section with a table containing one entry: ID 10, Description 'Classical', and Length '593 seconds'. Below this is another table with columns for ID, Description, Gain, File size, Length, and Actions. It contains one entry: ID 11, Description 'test_message', Gain 0, File size 0.02 MB, Length 3 seconds, and Actions 'Edit' and 'Delete'. At the bottom, there is a form to 'Upload local resource file' with fields for ID and Description, a 'Choose File' button, and an 'Add' button. A status bar at the very bottom indicates 'Disk Used: 0.02 MB of 50 MB used.' and 'Resources: 1 of 30 used.'

ID	Description	Length
10	Classical	593 seconds

ID	Description	Gain	File size	Length	Actions
11	test_message	0	0.02 MB	3 seconds	Edit Delete

Upload local resource file

ID: Description: Choose File No file chosen Add

Disk Used: 0.02 MB of 50 MB used.
Resources: 1 of 30 used.

Global Media List and Your Own Recordings

The Global Media List section in the Resources tab specifies any recordings that are already available for your use by default. If custom music on hold is enabled on your account, the second section will display any other recordings that have been uploaded to your system. Most of the changes described below will only apply to accounts that have customer music on hold enabled.

Recording Limits

If you have custom music on hold enabled, the bottom of the Resources tab will show you:

- How many MB of storage have been 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 allowed.

Adding a Recording

To add your own recording:

- Click on the **Resources** tab in the music on hold section then scroll to the bottom of the page.
- Enter an **ID** for this recording in the ID text box. This ID must be between 10 and 99.
- Enter a description for this recording in the **Description** text box.
- Click on **Browse** and select the recording you wish to upload. You can upload recordings to thy system in either WAV or MP3 format.
- Click on **Add**.

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

Modifying a Recording

To change the description of a recording:

- Click on the **Resources** tab in the music on hold section then scroll to the recording you would like to modify.
- Click on the **Edit** button to the right of the recording.
- **Edit** the description field.
- Click **Save**.

To change the volume at which a recording will play:

- Click on the **Resources** tab in the music on hold section then scroll to the recording you would like to modify.
- Click on the **Edit** button to the right of the recording.
- 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.
- Click **Save**.

To remove a recording:

- Click on the **Resources** tab in the music on hold section then scroll to the recording you would like to modify.
- Click **Delete** to the right of the recording you wish to delete.

Playing a Recording

You can play a recording that you have uploaded by clicking 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.

4.6.4 Assigning Recordings to Lines

An administrator can assign on hold recording to only some lines in the business, or assign different recordings per line. For example, you may want different music on hold to play for your sales hunt group than what plays for the billing hunt group.

To make this change, access the *mappings* section by clicking on that tab at the top of the Music on Hold interface.

Mappings in department: LSI - Lab Second Floor - EndPoint Packs (root)

ings resources

Initial resource	Action	Follow-up resource	Start Point	Duration	Actions
Global 10 - Classical	Repeat		Start		Edit
Initial resource	Action	Follow-up resource	Start Point	Duration	Actions
None	Repeat		Start		Add

2 of 20 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: [Department 1](#) [Department 2](#)

This section will show 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 a line 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 do not specify a mapping for a specific line.

Each mapping consists of a series of fields you may set:

- An initial resource, or recording, which is played when the call is put on hold from that line.
- 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, then the follow-up recording is played continually.
 - *Repeat- Initial Interrupted*- The initial recording should be interrupted at set intervals by the follow-up recording.
 - *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.

To add a mapping for a particular line:

- **Set** the fields to the left of the Add button.
- Click on **Add**.

If you need to utilize more than your allotted number of mappings, please contact Telesystem for assistance.

To modify either the Default mapping, or the mapping for a line:

- Click **Edit** to the right of the mapping.
- **Modify** the fields.
- 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.

To remove a mapping, click on the Delete button to the right of the mapping. You cannot delete the default mapping.

4.6.5 Music on Hold Phone Access

The Music on Hold telephone access allows you to listen to the music or other recordings for the default or configured mappings, listen to the global resources, create, change, or delete your own recordings.

To access the telephone interface for the Auto Attendant:

- Dial 215-391-4992 from any phone.
- When prompted, you will need to enter your account telephone number
- Then, enter your Music on Hold password (see section 4.6.2)

4.6.6 Using the Telephone Interface for Music on Hold

The telephone interface is menu driven with voice prompts, so listen to the prompts then press the associated key on your phone to select the desired option.

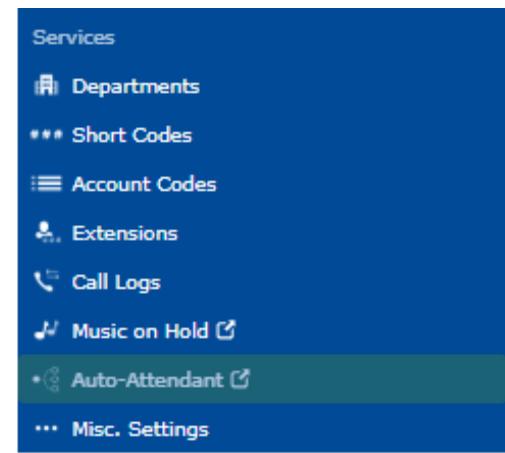
For your convenience, the top level menus provided by the telephone interface are:

- * = **Go Back.** 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 extension which do not have their own mappings.
- 2 = **Listen to resource for particular extension. Listen to global resources.** This allows you to listen to the recordings in the Global Media List, described in section 13.3. This will play you the recording which is played to callers on hold on a particular extension.
- 3 = **Listen to global resources.** This allows you to listen to the recordings in the Global Media List, described in section 13.3.
- 4 = **Manage existing local resources.** This allows you to modify or delete recordings you have added to the Music On Hold system. You will need the 2 digit resource ID to modify or delete a recording.
- 5 = **Record a new local resource.** This allows you to record a new resource over the phone.

4.7 Auto Attendant (NSeries)

Selecting the *Auto Attendant* section of the Services pane will open a new browser tab that details the configuration of any lines configured as a legacy *NSeries Auto Attendant*.

This section does not include information on Premium Attendant services. For more information about all types of auto attendants, please refer to section 5 which discusses the difference between and the management of each type of attendant.



4.8 Misc. Settings

The *Miscellaneous Settings* section shows various settings and number blocks related to your account. To access this section, click on the Misc. Settings link in pane to the left of your administrator screen.

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Misc. Settings

Number Blocks

External Calls

Other Settings

Not all of the lines in each telephone number block may have been allocated yet. Please contact us if you would like to reserve more numbers or to allocate more lines.

Telephone Number Block	Number of Lines Allocated
(267) 293 4030 -	1
(267) 293 4031 -	1
(267) 293 4032 -	1
(267) 293 4033 -	1
(267) 293 4034 -	1
(267) 293 4035 -	1
(267) 293 4036 -	1
(267) 293 4037 -	1
(267) 293 4038 -	1
(267) 293 4039 -	1
(267) 293 4040 -	1
(267) 293 4041 -	1
(267) 293 4042 -	1
(267) 293 4043 -	1
(267) 293 4044 -	1

This section includes three tabs:

- Number Blocks-** Lists telephone number blocks in your business group. Please keep in mind that not all services may have yet been allocated to all telephone numbers. Should you wish to make a change to the type of service on a line, please contact Telesystem.
- External Calls-** shows any group limits on external calling as well as the carrier code that is used to make outbound calls. Should a change be needed, please contact Telesystem.
- Other Settings-** several other group wide settings including:
 - Restricted Subscriber Messaging-*** set whether members of this Business Group can send messages only to other members of the same Business Group.
 - Internal Operator Number-*** allows the administrator to add the “zero out” option to callers when they reach any voicemail box in the business group. This feature can also be added per department instead of the whole entire company. For more information, see section 3.1.1.3.2.
 - Use Internal Extensions-*** choose whether or not CommPortal displays the Business Group extension number associated with a directory number where possible. This should be checked by default.

5 Auto Attendants Introduction

An Auto Attendant answers calls automatically and offers several different options to that caller. Attendants can be set up in a very complex or simple fashion, but the goal is always to route calls efficiently to the correct person or department.

Telesystem offers several types of auto attendants:

- Premium Attendant** is an advanced, automated menu that can direct calls to extensions, phone numbers, or a directory using the caller’s key presses. It allows for detailed configuration, virtual

extensions, multiple submenus, alternate menus for holidays or other scheduled times, and much more.

- **N Series Auto Attendant** is a legacy attendant that allows administrators to offer day, night, and holiday menus to their callers. These attendants also allow for multiple submenus and directories.

Each auto attendant looks quite different from the other. See section 5.2 for examples of each attendant then follow those instructions to manage the attendant type. If you have any questions, please contact Telesystem.

All auto attendants are assigned a telephone number that is not associated with a physical phone set. In other words, it is a functional (virtual) line. The telephone number assigned to the attendant is a direct line to the attendant itself and thus may be called to reach the attendant options.

5.1 Planning an Auto Attendant

Before configuring the attendant in the portal, it is important to fully understand how you would like your attendant to be set up.

To set up an Auto Attendant:

- Plan what the Auto Attendant should do.
- Set up the announcements the Attendant should use.
- Set up your business hours and holidays.
- Set up the menus the Attendant will use.
- Assign the menus you have set up to your Attendant.
- Record Attendant greetings and if you have a directory option, record the extension names.
- Test the Auto Attendant to confirm it is working properly by calling it.

Each of these tasks are explained in the following sections.

In many cases, your first attendant configuration will be done during the initial implementation. After that point, you may modify the existing attendant as much or as little as necessary.

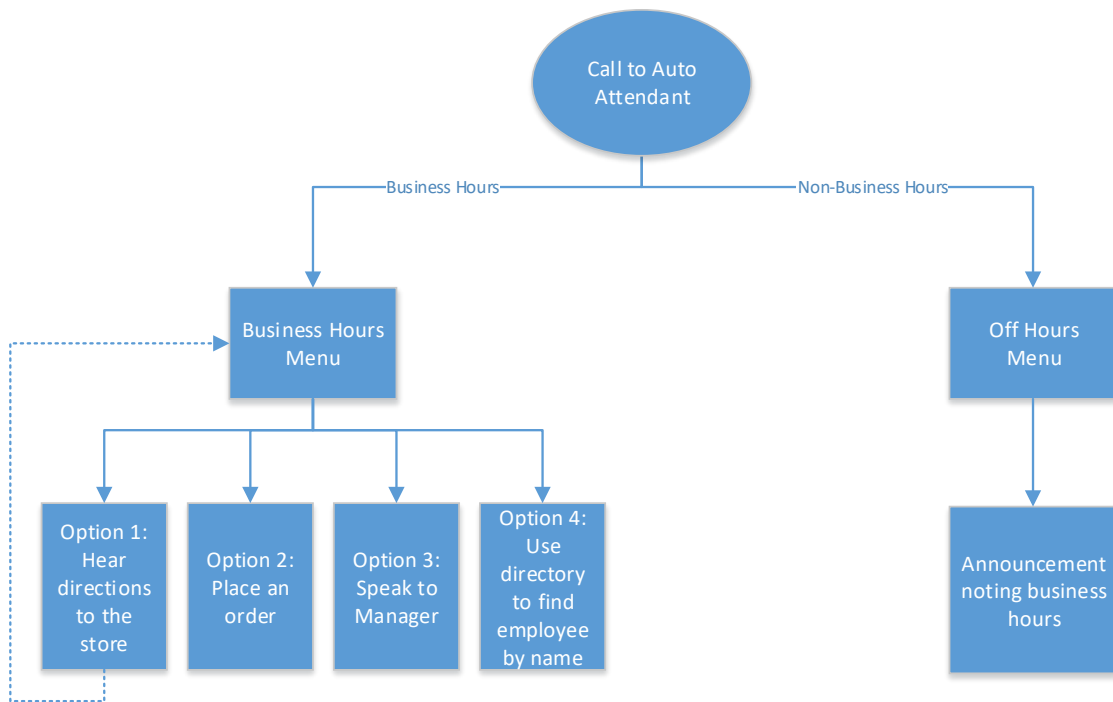
5.1.1 Drawing an Auto Attendant Call Flow

Before you begin to set up your Auto Attendant, you may want to sketch out the operation of each menu often referred to as a *call flow*. Understanding the options you wish to offer to callers will assist you in setting up the attendant properly.

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

- Play an announcement giving directions to the store, then return to the main menu so that the user can select another option.
- Place an order with a server.
- Speak to the manager.
- Speak to another employee using a dial-by-name directory.
- Play an alternate message during non-business hours.

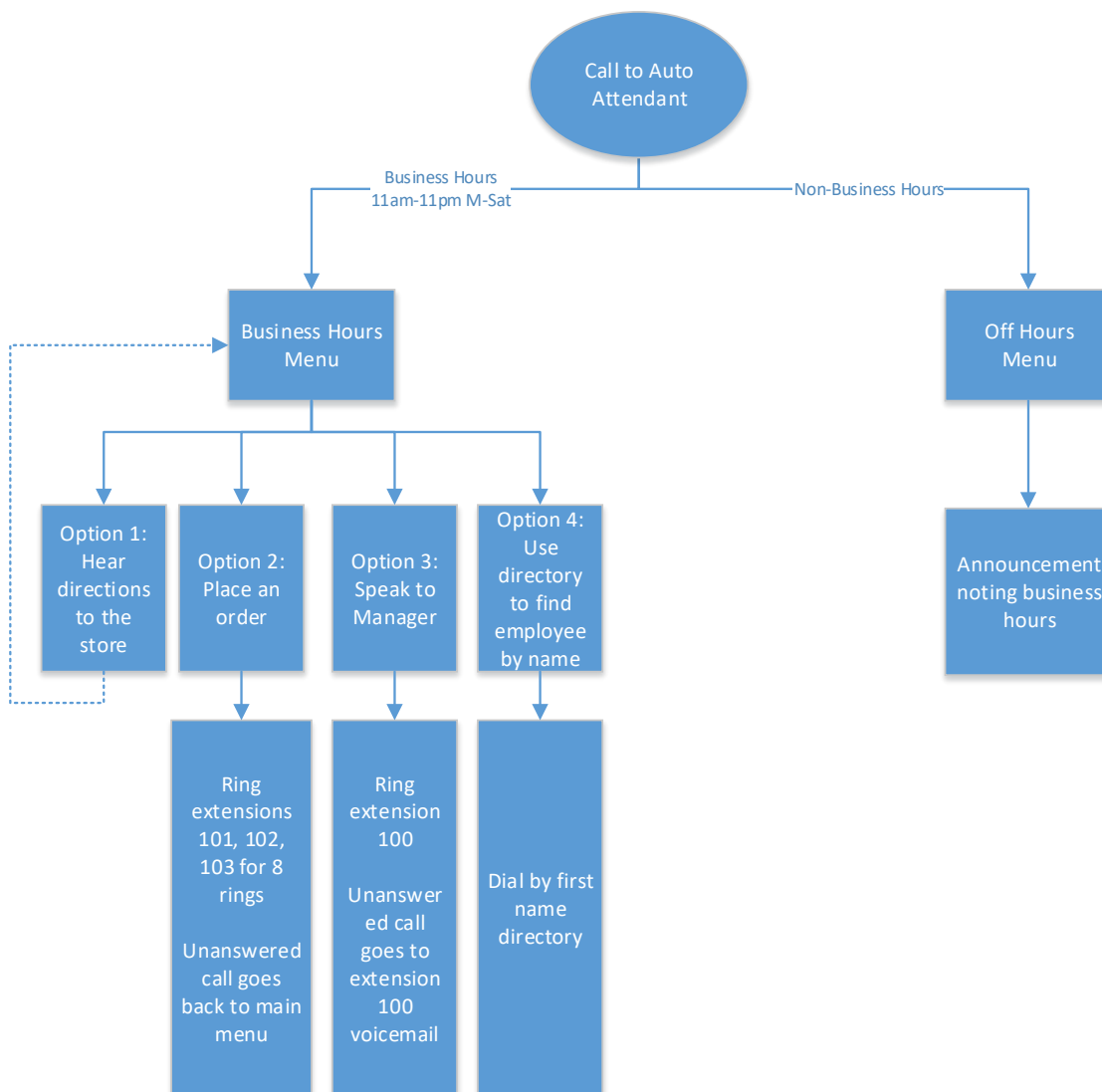
The sketch below shows how this menu would operate, including the key presses to access each option:



In the call flow diagram above, the business hours menu has an option 1 (directions to the store) shown with an arrow returning to the main menu. This indicates that the caller will be transferred back to the main menu so that they can select another option if required.

For off hours operation, the Auto Attendant may provide an announcement that the store is closed without allowing the caller to select any options. Alternately, it may provide a different set of menu options, in which case you should create a similar sketch for these menus.

When you understand the overall operation of the auto attendant, you'll then fill in more details to it such as the specific extension of the manager in option 3 and so on. See below for a more detailed example.





The example above provides the correct business hours, which extensions should ring when the options are pressed, and the type if directory used. When all the details are decided, you may configure and manage your auto attendant.

5.2 Managing your Auto Attendant

The first step in using this guide to manage your attendant is to identify whether you are using a *Premium* or *N Series* attendant. If you have further questions concerning which attendant is deployed at your site, please contact Telesystem.

Premium Attendants are managed in the *Attendants* section pane on the left of the administrator portal.

 Attendants

A dark star  icon appears by its line.

N Series Attendants are managed in the *Auto-Attendant* section on the left of the administrator portal.



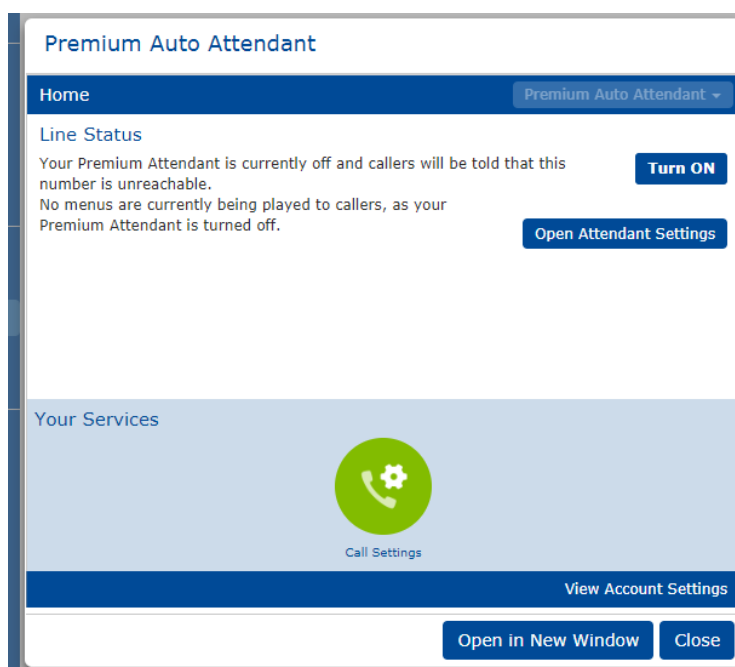
Once you've identified which type of attendant you have, you can follow the instructions to manage it:

- **Premium Attendant** go to section 5.3. These attendants manage calls with multiple menus, time periods, holidays, and external extensions.
- **N Series Attendant** go to section 5.4. These attendants manage calls with day, night, and holiday menus and time periods.

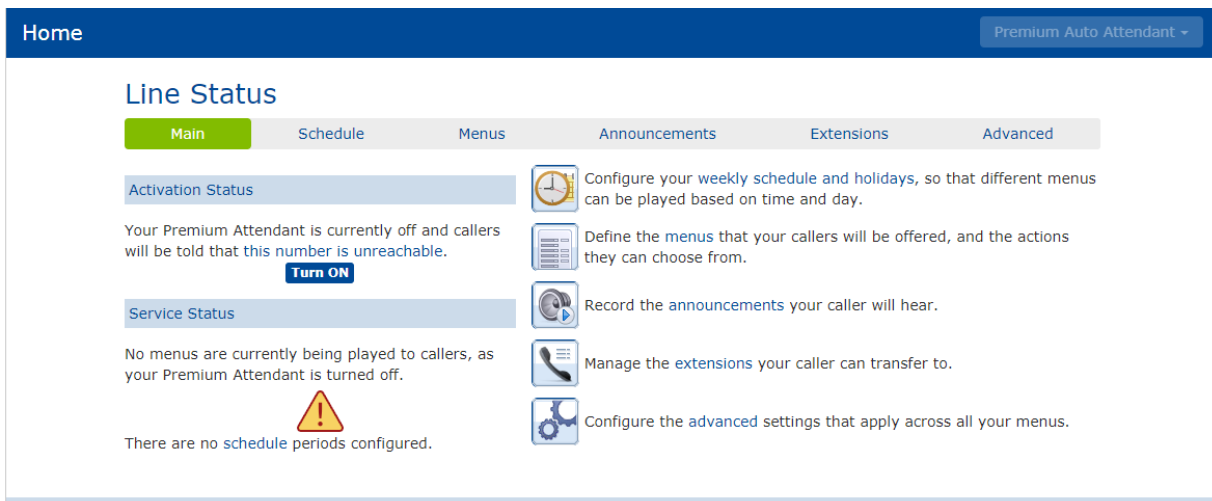
5.3 Premium Attendant Setup and Management

Setting up and managing an auto attendant requires any associated **menus**, **greetings**, and **schedules** to be configured. The following sections detail how to complete these tasks for a premium attendant.

Administrators may access the premium attendant by selecting *Attendants* in the All Lines pane. Select the attendant to modify then click on its **Actions** button and choose to *view attendant settings*.



Click *Open in New Window* to launch a full view of the attendant home screen:



The Home view includes six tabbed sections that line the top:

- Main
- Schedule
- Menus
- Announcements
- Extensions
- Advanced

Click on the tab to navigate to each. More information on each section is detailed below.

5.3.1 Premium Attendant: Main

The **Main** tab of a premium attendant's home screen provides summarized information that includes:

- The **Activation** status panel indicates whether Premium Attendant is currently turned on or off and, if it is turned off, whether calls are being forwarded to another number. The administrator can use the button to turn Premium Attendant on or off and click on the link to change the forwarding number or set Premium Attendant to play a recorded message instead.
- The **Service** status panel shows which schedule and menu are currently in force and reports if there are any errors in the configuration of your schedules, menus or announcements.
- The panel on the right-hand side provides a suggested workflow for setting up Premium Attendant using the Schedule, Menus, Announcements, Extensions and Advanced tabs, all of which are described in the sections that follow.

5.3.2 Premium Attendant: Schedule

The schedule tab allows you to allocate different treatment to different times of day or day of the week.

Home

Premium Auto Attendant

Line Status

Main
Schedule
Menus
Announcements
Extensions
Advanced

Add New Period
Rename
Delete
Apply
Cancel

Periods

All other times

Friday coverage

Working Hours

All other times

Special Days

During this period, use this menu: Off Hours

	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							

The schedule view shows the following at a glance:

- **Periods** that have been outlined in the left pane and their assigned menu. Each of these periods (may have up to 10) is assigned a unique color and represent different treatment of calls. For example, you may have calls handled differently during normal business hours versus after hours. The *Special Days* period also appears here and can be used to set up holidays or exceptions to the weekly schedule.
- The **Weekly Schedule** in the center pane shows which periods are associated with the daily times. You will notice that the color in the schedule pane matches the period's title on the left to make it easy to see where the period is allocated. Click the *Zoom In* link to see 15 minute time increments.

Administrators can add, remove, rename, and change all of the scheduled periods as shown below.

To create a new scheduled time period:

- Click **Add New Period**
- Enter a name for the period then click OK

The new period will automatically be assigned a unique color and appear on in the list of periods on the left pane. Be sure to assign an appropriate menu and allocate time periods to the schedule as needed (instructions below).

Periods

Friday coverage

Lunch

Working Hours

All other times

Special Days

Make modifications to an existing menu:

- **Select** the period in the left pane (orange highlight)
- After a period is selected, you may do any of the following:
 - **Rename** the period by clicking the **Rename** button
 - **Delete** the period by clicking on the **Delete** button
 - **Change the hours this period is in effect** by clicking on the schedule blocks.

- **Change the assigned menu** by choosing a different menu from the drop down to the right (shown below). The chosen menu will indicate which announcement and menu options are offered to the caller during that time period. Menus can be managed as shown in section 5.3.3.

- Be sure to press the **Apply** button to save any changes.

5.3.3 Premium Attendant: Menus

The Menu tab allows you to configure menus to be associated with the schedule periods that have been created. A menu brings together the configuration of the announcements and press options you decide to offer your callers.

All currently configured menus will appear in the left *Menus* pane.

Select a menu by clicking on its name in this pane. When selected, its title will show in **bold** lettering.

Add a new menu by clicking **Add New Menu** button at the top and entering a name for the menu. Click **Apply** to save.



***IMPORTANT:** If the menu has any type of an error, the menu name will be preceded by a caution icon. Common errors are that the menu does not have a recorded announcement or there is incomplete information on a key press. Be sure to address any errors before putting the menu to use.*

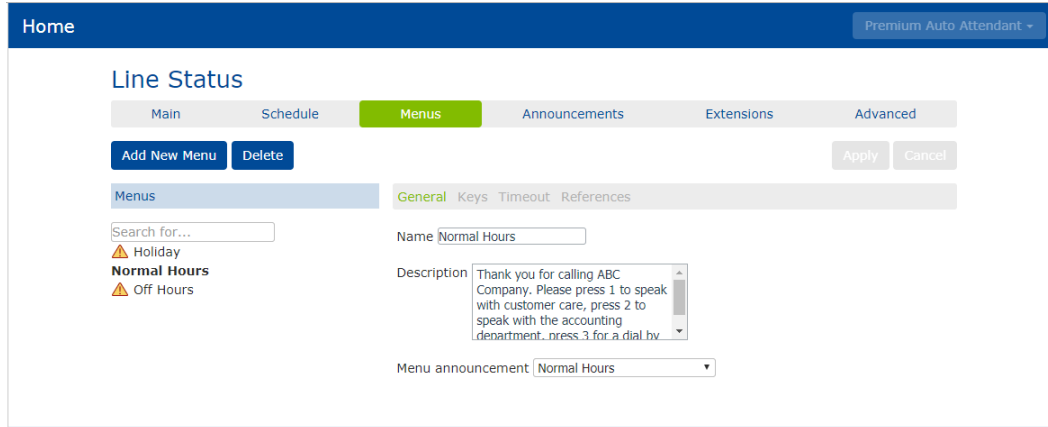
The selected menu's configuration is detailed in the four, tabbed subsections in the right pane:

- **General**- add a new menu, or edit the name, description and menu announcement of an existing menu.
- **Keys**- define the action for keys 1-9, 0, #, and * for a selected menu.
- **Timeout**- override the default value for timeout on a selected menu and specify the action that Premium Attendant will take if the caller does not press a key within this time.
- **References**- see whether the selected menu is referenced by any other menu or schedule in Premium Attendant. The administrator cannot delete a menu if it is referred in another schedule, unless the Premium Attendant is not currently active.

Each of these four sections is discussed below.


5.3.3.1 Premium Attendant: Menu General

The *General* section allows the administrator to modify the name, description, and announcement associated with any existing menus.



The fields that may be modified in this section are as follows:

- **Name-** the name of the menu visible in the administrator portal. This is usually used to indicate the time period for which the menu will be used.
- **Description-** the administrator can input an explanation of what this menu is used for or even the original script for the menu. This field is not required.
- **Menu announcement-** the recorded greeting that will play when this menu is used. The administrator can choose any announcement from the drop down menu. For more on creating and managing announcements, see section 5.3.4.

Remember to click  to save any changes.

5.3.3.2 Premium Attendant: Menu Keys

The *Keys* section allows the administrator to modify the press options made available whenever this menu is being used. These are the keys the caller will press to indicate where they want to be transferred.

Home
Premium Auto Attendant

Line Status

Main
Schedule
Menus
Announcements
Extensions
Advanced

Add New Menu
Delete
Apply
Cancel

Menus

Search for...

Directions
Holiday
Normal Hours
Off Hours

General
Keys
Timeout
References

1	Transfer to Phone	(610) 355 9700
2	Transfer to Voicemail	1001
3	Dial by Extension	?
4	Voicemail by Extension	?
5	Voicemail by Name	?
6	Go to Menu	Directions
7	Use Default	Do Nothing
8	Use Default	Do Nothing
9	Use Default	Do Nothing
0	Use Default	Do Nothing
#	Use Default	Replay Menu
*	Use Default	Return to Previous Menu

The keys that can be assigned per menu are 0-9, *, and #. To assign a value to any key press, select it from the associated drop down by the key. Options are as follows:

- **Use Default** – This option is selected when an option is not in use. It will apply the default treatment to the call that is outlined in the *Advanced* section. See section 5.3.6 for instructions on changing this.
- **Transfer to Phone** - transfers caller to the extension or telephone number entered in the adjacent textbox.
- **Transfer to Voicemail** - transfers caller directly to the extension's voicemail for which the extension is entered in the adjacent textbox. Be sure to enter a valid, business group extension that has voicemail.
- **Dial by Extension**- if you wish to require callers to dial a prefix before dialing a business group extension, you can use this option. In the option above, callers would have to dial 34100 to be transferred to extension 4100. An extension prefix is not necessary if the Extensions tab is allowing extensions to be dialed at any time (see section 5.3.5).
- **Dial by Name** - allows callers to search for users by first or last name. Only extensions that are selected in the *Extensions* tab and have recorded names (see section 5.3.5) will be searchable.
- **Voicemail by Extension** - if you wish to require callers to dial a prefix before an extension to be transferred to that extension's voicemail, you can use this option. In the option above, callers would have to dial 74100 to be transferred to extension 4100 voicemail box. Be sure to define the extensions you wish to allow or disallow callers to dial by going to the *Extensions* section (see section 5.3.5.1).
- **Voicemail by Name** - if you wish to offer callers the option to dial by name, you can use this option. Be sure to define the extensions you wish to allow or disallow callers to dial by going to the *Extensions* section (see section 5.3.5.1).
- **Intercept mailbox**- This option will transfer the caller to the default mailbox configured in the *Advanced* section (see section 5.3.6).
- **Go to Menu**- This option allows you to transfer the caller to a submenu. For example, you may want to have a submenu that lists directions to your location.
- **Return to Previous Menu**- if the previous *go to menu* option was used to transfer the caller to a submenu, this option will allow the caller to return back to the previous level menu.
- **Replay Menu**- replay the menu announcement to the caller
- **Announcement – Return** - This plays a selected announcement then returns the caller to the current menu. This option is not to be used as a top level menu loop.*
- **Announcement - Hang up** - This plays a selected announcement then releases the call.

- **Hang up-** Drops the call.

**IMPORTANT NOTE: It is strongly advised that these options never be used on a top level menu in a way that permits the call to automatically “loop” since this will keep playing indefinitely unless there is a human interaction (hang up, option pressed).*

5.3.3.3 Premium Attendant: Menu Timeout

If a caller does not press a menu option in a certain amount of time, the call will *timeout*. The default rule for all timeouts is found in the *Advanced* section (see section 5.3.6), however it can be overridden per menu in this section.

The screenshot shows the 'Line Status' interface with the 'Menus' tab selected. Under the 'Menus' tab, the 'Timeout' sub-tab is active. The 'Override timeout behavior' checkbox is checked. The 'Set timeout duration to' field is set to 3 seconds. The 'After timeout, perform the following action' dropdown is set to 'Hang up'.

The above example shows a menu that is using the default timeout which will hang up on the caller after 3 seconds if no other decision is made.

To modify this, click *override timeout behavior* then change the timeout duration and action as desired before clicking Apply. For an explanation of all actions, see section 5.3.3.2.

5.3.3.4 Premium Attendant: Menu References

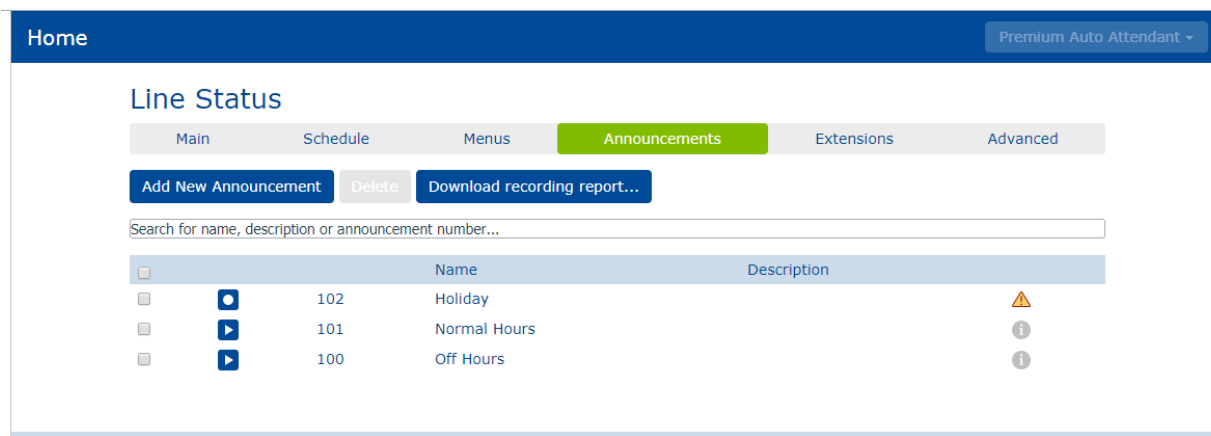
The *References* section outlines any periods that are using the selected menu.

The screenshot shows the 'Line Status' interface with the 'Menus' tab selected. Under the 'Menus' tab, the 'References' sub-tab is active. It shows that the 'Normal Hours' menu is referenced by the 'Working Hours' and 'Friday coverage' periods.

The example above shows that the *Normal Hours* menu is being used by the *Working Hours* period and the *Friday coverage* period. Since the menu has been assigned to one or more periods, it cannot be deleted. To modify the period’s menu assignment, go to the *Schedule* section (see section 5.3.2).

5.3.4 Premium Attendant: Announcements

The *Announcements* section allows the administrator to create and manage announcements to be used in the system's menus.

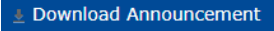


In this section, the administrator may:

- **Add a new announcement** – click **Add New Announcement** to add a new announcement to the list. A name for the announcement is required to create the new announcement and an optional description and recording can be added as well.
- **Delete a current announcement** – place a checkmark to the left of the announcement name then click **Delete** to delete an announcement.
- **Download a recording report** – click **Download recording report...** to download a csv file listing information about each announcement. The downloaded file will list the announcement ID number, name, description, whether or not a recording is uploaded, and whether or not the announcement is applied on any menu already (“referenced”). It is helpful to refer to this report to ensure all announcements have been recorded, however announcements that have no recording also appear with a caution sign in the list.
- **Modify an existing announcement** – click on an announcement in the list to modify it in the popup screen that appears as shown in the following example:

The screenshot shows a popup window for editing an announcement titled 'Holiday'. It has a 'Name' field with 'Holiday' entered and a 'Description' field with the placeholder 'Enter optional description...'. Below these is a dropdown menu set to 'Record / Play Announcement'. At the bottom, there is a 'Loading...' progress bar, a play button, and a volume icon. The 'Save' and 'Cancel' buttons are at the bottom right.

- **Name-** Enter a name for the announcement
- **Description-** Enter a description for the announcement. This is an optional field. If a description is entered, it will show on the main announcement screen.

- **Record/Play Announcement-** Use this drop down to choose to upload an announcement.
 - The “record by phone” option may be completed by using the access instructions discussed in section 5.3.7.
 - If “upload announcement” is chosen, you may upload a prerecorded file. Valid file formats are G711 WAV (8-bit ulaw / alaw, mono, 8kHz), 16-bit PCM WAV (16—bit, PCM, mono, 16kHz). Announcements can be no more than 120 seconds in length.
 - When “Record/Play Announcement” is selected, the player will appear at the bottom (requires Adobe Flash). The player can playback an existing recording or, if you have a microphone attached to your computer, it will record as well. The  option also appears and allows the administrator to download a copy of the current announcement.

IMPORTANT: each announcement is automatically assigned a three digit code called an “announcement ID”. This code will precede the announcement’s name in this section. If you are utilizing the telephone interface to do recordings, you must take note of the assigned announcement ID for each announcement you plan on recording. In the example shown below, announcement 102 is associated with the Holiday announcement; announcement 101 is associated with the Normal Hours announcement.

		Name	Description	
		102 Holiday	Thank you for calling ABC Company! We are currently closed in observance of the holiday. Please press 1 to reach the answering service, press 2	
		101 Normal Hours		

5.3.5 Premium Attendant: Extensions

The *Extensions* tab has two subsections, Business Group Extensions and Additional Extensions. Each section’s features are detailed below.

5.3.5.1 Premium Attendant: Business Group Extensions

The *Business Group Extensions* section lists any extensions in your business group and allows you to modify the way the attendant accesses each.

Line Status

Main	Schedule	Menus	Announcements	Extensions	Advanced
------	----------	-------	---------------	------------	----------

Business Group Extensions Additional Extensions

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

<input type="checkbox"/>	Extension	Name	Telephone Number	Department	Included?	Spoken Name
<input type="checkbox"/>		General Voicemail	(267) 293 4037	Main Office	✓	record
<input type="checkbox"/>		Premium Auto Attendant	(267) 293 4039	None	✓	record
<input type="checkbox"/>		Easy Auto Attendant	(267) 293 4040	None	✓	record
<input checked="" type="checkbox"/>	1001	Jerry Stein	(267) 293 4031	Main Office	✓	record
<input type="checkbox"/>	1002	Elaine Bennet	(267) 293 4032	Main Office	✓	record
<input type="checkbox"/>	1003	George Costa	(267) 293 4033	Main Office	✓	record
<input checked="" type="checkbox"/>	1004	Cosmo Kranner	(267) 293 4034	Main Office	✓	record
<input type="checkbox"/>	1005	Bob Sacamanto	(267) 293 4035	South Office	✓	record
<input checked="" type="checkbox"/>	1006	Frank Costa	(267) 293 4036	South Office	✓	record
<input type="checkbox"/>	34041	MADN	(267) 293 4041	None	✓	record
<input type="checkbox"/>	34042	MLHG	(267) 293 4042	None	✓	record
<input type="checkbox"/>	34043	MLHG IACD1	(267) 293 4043	None	✓	record
<input type="checkbox"/>	34044	MLHG IACD2	(267) 293 4044	None	✓	record
<input type="checkbox"/>	34045	Incoming Call Manager	(267) 293 4045	Main Office	✓	record

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

The following attendant features are affected by the choices made in this section:

- Dial by Extension
- Dial by Name
- Voicemail by Extension
- Voicemail by Name

For a complete explanation of each of the above functions, see section 5.3.3.2.

The administrator may decide to include all lines, exclude all lines, or choose which lines should be included in the above feature options.

To include all lines: click then click **Yes** to confirm the change.

All lines will have a checkmark in the *Included* column as shown:

Line Status

Main	Schedule	Menus	Announcements	Extensions	Advanced
------	----------	-------	---------------	------------	----------

Business Group Extensions Additional Extensions

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

<input type="checkbox"/>	Extension	Name	Telephone Number	Department	Included?	Spoken Name
<input type="checkbox"/>		General Voicemail	(267) 293 4037	Main Office	✓	record
<input type="checkbox"/>		Premium Auto Attendant	(267) 293 4039	None	✓	record
<input type="checkbox"/>		Easy Auto Attendant	(267) 293 4040	None	✓	record
<input type="checkbox"/>	1001	Jerry Stein	(267) 293 4031	Main Office	✓	record
<input type="checkbox"/>	1002	Elaine Bennet	(267) 293 4032	Main Office	✓	record
<input type="checkbox"/>	1003	George Costa	(267) 293 4033	Main Office	✓	record
<input type="checkbox"/>	1004	Cosmo Kranner	(267) 293 4034	Main Office	✓	record
<input type="checkbox"/>	1005	Bob Sacamanto	(267) 293 4035	South Office	✓	record
<input type="checkbox"/>	1006	Frank Costa	(267) 293 4036	South Office	✓	record

To exclude all lines: click **Exclude All Lines** then click **Yes** to confirm the change.

All lines will have nothing the *Included* column as shown:

Main	Schedule	Menus	Announcements	Extensions	Advanced
Business Group Extensions Additional Extensions					
Include Selected Exclude Selected Include All Lines Exclude All Lines					
Search for entry by extension, name or telephone number...					
Extension	Name	Telephone Number	Department	Included?	Spoken Name
<input type="checkbox"/>	General Voicemail	(267) 293 4037	Main Office		record
<input type="checkbox"/>	Premium Auto Attendant	(267) 293 4039	None		record
<input type="checkbox"/>	Easy Auto Attendant	(267) 293 4040	None		record
<input type="checkbox"/> 1001	Jerry Stein	(267) 293 4031	Main Office		record
<input type="checkbox"/> 1002	Elaine Bennet	(267) 293 4032	Main Office		record
<input type="checkbox"/> 1003	George Costa	(267) 293 4033	Main Office		record
<input type="checkbox"/> 1004	Cosmo Kranner	(267) 293 4034	Main Office		record
<input type="checkbox"/> 1005	Bob Sacamanto	(267) 293 4035	South Office		record
<input type="checkbox"/> 1006	Frank Costa	(267) 293 4036	South Office		record

To choose certain lines to be included/excluded:

- If *all lines are already included*, click the checkmark to the left of the user's name, click **Exclude Selected** then click **Yes** to confirm the change.
- If *all lines are already excluded*, click the checkmark to the left of the user's name, click **Include Selected** then click **Yes** to confirm the change.

IMPORTANT: To be searchable in the *dial by name* or *voicemail by name*:

- The extension must be *included* as shown above.
- The extension must have a recorded name associated with it. The **override** icon indicates that a name announcement has been recorded/uploaded. The **record** icon indicates that no name is currently associated with the extension. When the user sets up their voicemail, they have the opportunity to record their name if they do this it will translate to the dial by name directory. Additionally, the administrator can upload the name announcement by clicking on the *record* icon.

Finally, the administrator may also make the following modifications using the links at the bottom of the *Business Group Extensions* page:

- **New business Group extensions will be automatically included/excluded-** choose whether or not new extensions are automatically to be included in these attendant features or not.
- **Callers are allowed to dial by extension at any time / only after selecting Dial by Extension menu option-** choose whether or not callers may dial an extension from the auto attendant at any time or only after using the Dial by Extension feature.

5.3.5.2 Premium Attendant: Additional Extensions

Additional Extensions are extensions that resolve to a telephone number that is not part of your hosted business group. For example, you may have an outside salesperson that has a company cell phone rather than a hosted station phone number. You can add an auto attendant extension that resolves back

to this external number so that a caller can dial it from the attendant. Please note that these extensions are different to any "internal" extension numbers you may use for dialing colleagues within your business group.

For each additional extension, you must choose an extension number between 1 and 7 digits (that does not conflict with an existing extension or code), and the phone number that a connected call should be transferred to. Administrators can configure up to 200 additional extensions per attendant.

Home Premium Auto Attendant

Line Status

Main Schedule Menus Announcements **Extensions** Advanced

Business Group Extensions **Additional Extensions**

Delete Selected Add Extension

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

Extension	Name	Telephone Number	Spoken Name
<input type="checkbox"/> 2001	Sid Smith	(555) 123 4545	record
<input checked="" type="checkbox"/> 2002	Putty Jones	(555) 789 9111	record

Callers are allowed to dial by extension at any time

To add a new additional extension:

- Navigate to the **Extensions – Additional Extensions**
- Click **Add Extension**
- **Enter** the details
 - *Name and Number*- fill in an extension number, first name, last name, and appropriate telephone number. All fields are required.
 - *Record/Upload Spoken Name*- this is not immediately required, however these sections allow the administrator to upload an extension name or record it from their computer. For more information on recordings, see section 5.3.7.
- Click **Save**

To delete an existing extension:

- Navigate to the **Extensions – Additional Extensions**
- Place a **checkmark** to the left of the extension in the list that should be removed
- Click **Delete Selected** to immediately remove the extension

To modify an additional extension:

- Navigate to the **Extensions – Additional Extensions**
- Click on the extension that should be modified
- Modify details as needed then click **Save**

Details that may be modified include:

- *Name and Number*-
 - Includes the assigned extension number, first name, last name, and appropriate telephone number where calls to this extension forward.
- *Record Spoken Name*-

- If your computer has a microphone, use the displayed player to do the spoken name recording.
- If your computer does not have a microphone (and you have no file to upload as shown in next paragraph), see instructions in section 5.3.7 for recording extension names via the telephone interface
- *Upload Spoken Name-*
 - If you have a wav file of the user's spoken name, you may upload it by clicking *Choose File* then follow the prompts to find the correct file and Upload it.

IMPORTANT NOTES:

1. *To be searchable in the dial by name or voicemail by name, the extension must have a recorded name associated with it (see section 5.3.7). The recorded name will play for the caller before they are transferred to the extension.*
2. *Please note that hunt group and MADNs with assigned extensions are not considered to be true 'users' in the system and thus do not appear in the Extensions list of the directory. Because of this, you can add the hunt group or MADN as an additional extension if your external callers must dial the hunt group or MADN via an extension.*

5.3.6 Premium Attendant: Advanced

The *Advanced* section allows the administrator to modify system default values for the attendant configuration. It consists of three subsections: Default keys, error handling, and other settings.

Default Keys

Modify what happens if a caller presses a key that has not been configured in the menu that is in use. These default actions in this section are applied to calls unless alternative actions are already configured menu.

In addition to no action ("Do Nothing"), the administrator can choose from a list of actions in each key drop down. See section 5.3.3.2 for an explanation of all key actions.

Error Handling

Administrators can change how the call is handled when the caller makes the following errors:

- **Timeout-** If a caller fails to press a key within the specified time here, this action will apply to the call
- **Unknown Input-** If the caller presses an invalid key more than the amount of times specified here, this action will apply.
- **Call Transfer-** If a call transfer fails within the specified outdial timeout, this action will apply.
- **Invalid Extension-** A caller selects an invalid extension for a specified number of times, this action will apply.

Other Settings

This section allows the administrator to choose whether dial by name transfers are matched on first *and* last name, first name, or just last name.

Set the telephone number for the voice mailbox to be used on the 'Intercept mailbox' action.

5.3.7 Premium Attendant: Recording Announcements and Extension Names

It is important to make sure all audio is recorded for the auto attendant to work properly. These recordings include announcements and extension names for the users:

- **Announcements (Greetings)** are heard when a caller is interacting with the auto attendant. For example, an announcement may say *“Thank you for calling. Please dial 1 for accounting, 2 for shipping...”*
- **Extension Name Recordings** are used if you are utilizing the dial by name or voicemail features on the attendant.

The audio for these may be managed in the CommPortal or by calling into the telephone access number as explained below.

Before you begin the recording process, be sure to gather:

- The phone number listed in the portal for the attendant and its password (also known as the voicemail PIN)
- All announcement IDs (see end of section 5.3.4) and each announcement’s script
- All extension numbers and their associated names

To record attendant announcement using the telephone interface:

1. Call 215-391-4999 from any phone

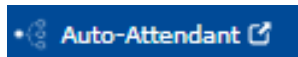
2. If dialing from a phone on the Telesystem network, press * (if not, skip this step)
3. When prompted, enter your attendant account phone number and password
4. Press 1 to change attendant configuration
5. Press 2 to record an announcement
6. Enter the announcement ID of the announcement
7. Follow the prompt to listen to, record, and save the initial announcement and any other key announcements

To record the extension names using the telephone interface:

1. Call 215-391-4999 from any phone
2. If dialing from a phone on the Telesystem network, press * (if not, skip this step)
3. When prompted, enter your attendant account phone number and password
4. Press 1 to change attendant configuration
5. Press 3 to record an extension name
6. Enter the extension of the user whose name you want to record
7. Follow the prompt to listen to, record, and save the name recording

Remember, only users that have recorded names are searchable in dial by name/voicemail features. Business Group Extension users can set up their recorded name when they are setting up their voicemail account instead of the administrator doing it via the interface.

5.4 N Series Attendant Setup and Management



section allows you to manage your N Series Auto Attendant.

Access the configuration of these Auto Attendants by clicking on the **Auto Attendant** link in pane to the left of your administrator screen. This will open a new browser window for the Auto Attendant system. The window that opens up will list all of the Attendants in your business or department.

If the group you administer has several departments with an attendant in each, you will see links to these departments on the bottom left of the screen with you may click on to navigate to that section. If the Auto Attendant is part of the top level, this section will take you directly to that main level Attendant's global settings as shown below.

The screenshot displays the 'Auto-Attendants' configuration page. On the left sidebar, there are links for 'Auto-Attendants', '610-346-4139', and 'Extensions'. The main content area is titled 'Account Information' and shows 'Account: 6103464139, DN: 610-346-4139'. Below this, it states 'Auto-Attendants in department: LSI - Lab Second Floor - EndPoint Packs (root)'. The configuration form includes the following fields:

- Auto-Attendant Status:** A checkbox labeled 'Enabled' is checked.
- Default Telephone Number:** A dropdown menu showing '4131 - Polycom VVX410'.
- Admin Password for Telephone Access:** A text input field containing '4139'.
- Directory Matching Method:** A dropdown menu showing 'LASTNAME'.
- Extension Prefix:** A text input field containing an asterisk (*).

Each field has a yellow question mark icon to its right. At the bottom left, there is a section 'View lines in subdepartment:' with links for 'Department 1' and 'Department 2'. A 'Save' button is located at the bottom right of the form.

To manage the Attendant, click the + icon to the left of the Auto Attendant number and expand or collapse the sections as necessary. This will give you options you can use to manage the Attendant.

5.4.1 N Series: Global Auto Attendant Properties

When you click on the phone number for your Auto Attendant, you will see the global Auto Attendant settings. This is the default view.

The screenshot displays the 'Account Information' page for an Auto-Attendant. The page header shows 'Auto-Attendants' with a tree view containing '610-346-4139' and 'Extensions'. The main title is 'Account Information' with the account number '6103464139, DN: 610-346-4139'. Below the title, it states 'Auto-Attendants in department: LSI - Lab Second Floor - EndPoint Packs (root)'. The settings are listed in a table-like format with a 'Save' button at the bottom right.

Field	Value	Help Icon
Auto-Attendant Status	<input checked="" type="checkbox"/> Enabled	?
Default Telephone Number	4131 - Polycom VVX410	?
Admin Password for Telephone Access	4139	?
Directory Matching Method	LASTNAME	?
Extension Prefix	*	?

View lines in subdepartment:
[Department 1](#) [Department 2](#)

Save

Auto-Attendant Status

This field shows whether the Auto Attendant is enabled.

- To enable, **check** the Enabled checkbox. Click Save.
- To disable, **uncheck** the Enabled checkbox. Click Save.

Default Telephone Number

The Default Telephone Number is the extension or phone number that all calls will be routed to if the Auto Attendant is disabled (see Status explanation above). To change this number:

- Use the **Default Telephone Number** drop down list to select an extension.
- Click on **Save**.

Admin Password for Telephone Access

By default, the password for the Auto Attendant is usually the last four digits of the Auto Attendant number. To change the password that you use to access the telephone interface (see section 5.4.8) for this Auto Attendant:

- **Enter** the new password in the Administrator Password for Telephone Access text box.
- Click on **Save**.

Directory Matching Method

The Directory Matching Method specifies whether a dial by name directory should match based on the first name or the last name. To change this:

- **Select** the new desired value from the Directory Matching Method drop down list.
- Click on **Save**.

Please note that if you want to offer the directory as an option on an auto attendant menu, it must be added to the appropriate menu(s) and the extension names must be recorded (see sections 5.4.3 and 5.4.8).

Extension Prefix

The Auto Attendant can allow callers to access a particular extension at any time by dialing the prefix configured here followed by the extension number. You may use *, #, or 0-9 as a prefix. Keep in mind that any key you use as a prefix will not be available for use as a menu option.

To change the extension prefix:

- Type the desired prefix in the Extension Prefix text box.
- Click on **Save**.

*For example, if the Extension Prefix is *, your callers may dial * plus a valid extension at any time during the auto attendant greeting in order to be transferred directly to the extension.*

5.4.2 N Series: Announcements

The Announcement is what your caller will hear when they reach the Auto Attendant. You must set up an announcement before you can set up a menu.



To add a new announcement:

- Click on the **Announcements** heading for the Auto Attendant you are modifying.
- Enter a name for this announcement in the **Announcement Name** field.
- Enter a description for this announcement in the **Announcement description** field.
- If you have the recording to upload, select the file by clicking **Browse**. This must be in .wav format. If you do not have the announcement, you can either upload it later or record it using the telephone interface.
- Click on **Create**.

The new announcement will now appear below Announcements heading in the menu tree with an automatically assigned ID number. If you are going to record this announcement using the telephone interface, you will need to note that three-digit announcement ID displayed to the left of the announcement. More information on recording announcements using this interface is in section 5.4.3.

The screenshot shows the 'Announcements' configuration page for an Auto-Attendant. On the left is a tree view showing the hierarchy: Auto-Attendants > 610-346-4139 > Announcements. Under 'Announcements', there are several items: 100 - Day, 101 - Night, 102 - Holiday, 103 - Inclement Weather, 104 - Directions Hour, 105 - Test, Menu, Menu Assignments, Hours/Holidays, Reports, and Extensions. Below the tree, there are links to 'View lines in subdepartment: Department 1 Department 2'. The main area is titled 'Announcements' and contains the following fields: 'Announcement Name' with the value 'New Announcement', 'Announcement description (256 character limit)' with the value 'New Announcement' and a character count of '17 characters', and an 'Upload wav file (optional)' section with a 'Choose File' button and the text 'No file chosen'. There are three yellow question mark icons next to the Name, description, and upload sections. At the bottom right is a 'Create' button.

Recording an Announcement

If no recording has yet been applied to the announcement, a broken link icon  will show up to the left of the announcement ID and name. If there is already an associated recording, a small paper icon  will appear to the left of the announcement ID and name.

If the announcement has been pre-recorded and saved as a .wav file, you can upload it directly to the system by clicking on the announcement then the Browse button the upload.

Alternately, you may use the access number for the telephone interface to call in (from any phone) and record the announcement. See section 5.4.3 for access instructions. After you have entered the system, use option 3 (greetings) and follow the prompts to listen to, record, and save greetings. Be sure to note the announcements' three digit announcement ID shown in the administrator portal in order to record your greeting on the correct announcement.

To edit the announcement:

- Click on the **Announcement** in the menu tree.
- Edit the **Announcement Description** field.
- Select a new announcement to upload by clicking on **Browse**.
- Click on **Save**.

To remove an announcement:

- Click on the **Announcement** in the menu tree.
- Click on **Delete**.

Please be sure to check that this announcement is not being used by one of the current menus before deleting it.

5.4.3 N Series: Menus

The Menus entry in the Attendant allows you to create and modify the menus used by the Auto Attendant. These menus define the announcement played and any valid key presses (press options) during each.

Since the Auto Attendant allows you to preset different Attendants for business hours, off hours, and holidays, you may want to have a corresponding menu for each period. It is up to you to decide how much to tailor your attendant to meet your business' needs. You can have up to 150 pre-built menus per Auto Attendant.

Auto-Attendants

610-346-4139

Announcements

Menus

10 - Day

11 - Night

12 - Holiday

13 - Inclement Weather

14 - Directions Hours

15 - Tests

Menu Assignments

Hours/Holidays

Reports

Extensions

Menus

Auto-Attendants in department: LSI - Lab Second Floor - EndPoint Packs (root)

Menu Name
Please provide a unique name for all your menus

Day

Menu Description (256 character limit)
Describe how this menu differs from others that can use the same announcement

Day

3 characters

Announcement
Choose the announcement to be played

100 - Day

Timeout Period
Wait up to 3 seconds for key press.

Save Delete

Menu Options

To add a menu:

- Click on the **Menus** heading for the Auto Attendant you are modifying.
- Enter a name for the menu in the **Menu Name** text box.
- Enter a description for the menu in the **Menu Description** text box.
- Select the announcement to be played for this menu from the **Announcement** drop down list.
- Set the timeout period using the **Timeout Period** text box (or keep the default setting).
 - *This is the amount of time the Auto Attendant will wait for the caller to press an option after the announcement is finished playing. If the user does not select an option within this time, then the Attendant can perform the action configured for the Timeout filter (described below).*
- Click on **Save**.

The new menu will now appear below the Menu heading in the tree.

Configuring Menu Options

You can use the Menu Options section to offer various menu options to the caller. When you select any existing menus, the Menu Options section shows up on the bottom of the page. In the example below, press options 1-3 transfer to specific extensions, option 0 transfers to an external phone number, and option 4 transfers the caller to the directory.

Save Delete

Menu Options
To add an option to the menu, choose a filter and an action to perform for the filter.
Choose a filter ▾ Choose an action ▾ Add ?

Current Menu Options

Key	Action	Parameter	Delete	?
0	Transfer	Extension "4131"	Delete	?
1	Transfer	Extension "88806111"	Delete	?
2	Directory		Delete	?
3	Menu	Goto Menu "Directions Hours SubMenu"	Delete	?
4	Transfer	Extension "610359779"	Delete	?
5	Transfer	Extension "4130"	Delete	?
6	Menu	Goto Menu "Tests"	Delete	?
7	Transfer	Extension "610359712"	Delete	?

View lines in subdepartment:
[Department 1](#) [Department 2](#)

To add an action (press option) to the attendant:

- **Select** the menu you wish to modify.
- **Scroll** to the bottom of the screen to view the current Auto Attendant tree (Menu Options).
- To add an option, select a **Filter** from the drop down list.
 - The filter is either a key a caller will press to trigger the action or a Timeout (no decision). The available filter keys are the numbers 0-9, the # and * key, and the Timeout. If you've assigned an extension prefix (see section 5.4.1) in the auto attendant global settings, this option will not be available.
- Select an **action** to be associated with the chosen filter.
 - *Transfer*. Transfers the call to an extension or phone number (this may be an internal or external number). When this option is selected, you may select an extension from the list, or use the text box to type in an extension, phone number, or even a direct transfer to voicemail (the number "7" followed by the extension).
 - *Menu*. This transfers the call to another menu. When this option is selected, you must select the appropriate menu to which the call will be transferred.
 - *Menu-Back*. This transfers the call back to a previous menu. This option is not to be used on a top level menu. *
 - *Announce-Return*. This plays an announcement then returns the caller to the current menu. This option is not to be used as a top level menu loop. *
 - *Announce-Release*. This plays an announcement then releases the call.
 - *Release*. Drops the call.
 - *Directory*. This enters the directory function which allows the caller to search for an extension using the dial by name function. See section 5.4.8 for more information on recording the auto attendant directory.
- Click **Add**.

****IMPORTANT NOTE:** It is strongly advised that these options never be used on a top level menu in a way that permits the call to "loop" since this will keep playing indefinitely unless there is a human interaction (hang up, option pressed).*

5.4.4 N Series: Menu Assignments

The Auto Attendant allows you to define different time periods for business hours, off hours, and holidays. If you want to utilize off hours and holiday menus, you must define your business hours and holidays in this section.

To define holidays:

- Expand the **Hours/Holidays** entry by clicking on the + icon to the left of it.
- Click on the **Holidays Entry**.

This section will display a calendar for the current year. Any date that is currently assigned as a holiday is shaded in dark blue.

- To assign a new date as a holiday, click on the date in the calendar. The date will then show this day shaded in blue to indicate it is considered a holiday.
- To clear a date that is currently assigned as a holiday, click on the shaded date. The display changes to show this date unshaded.
- You can also assign holidays for future calendar years. Click on the *Calendar Year* field at the top of the dialog to select the year.

To manage business hours:

- Expand the **Hours/Holidays** entry by clicking on the + icon to the left of it.
- Click on the **Business Hours** entry.

Business/Weekend Menu Assignment

Auto-Attendants in department: LSI - Lab Second Floor - EndPoint Packs (root)

Time Zone

Please choose the time zone of this schedule.

US/Eastern

Business Hour Definition

Enter the start and end time (24 hour HH:MM) of each business day in the appropriate week day. If the week day is not a business day, leave both the start and end time fields blank..

	Mon	Tues	Wed	Thurs	Fri	Sat	Sun
Start Time	9:00	9:00	9:00	9:00	9:00		
End Time	17:00	17:00	17:00	17:00	17:00		

Save

- Ensure that the correct time zone is selected by using the drop down list at the top of the page. Click the **Save** button if you change this.
- Set up your business hours for each day of the week.
 - The Attendant requires hours to be entered in a 24 hour format hh:mm. For example, if your business hours are 9:00am to 5:00pm, use 09:00 and 17:00.
 - If your business is not open on a particular day, leave the Start Time and End Time blank. If your business is open 24 hours a day, you may leave all of this section blank and adjust the Menu Assignments section accordingly (all Night mode)
- Click the **Save** button below the time table after business hours have been modified.

5.4.5 N Series: Hours/Holidays

After the menus are created and business hours and holidays are defined, you will assign the appropriate menu for that time of day. You may assign the same menu to more than one time period.

To define the menus:

- Select the **Menu Assignments** entry in the tree.
- Select the menu you want for **holidays** by using the drop down list to the right of *Select the menu that will be used on holidays.*
- Select the menu you want for **business hours** by using the drop down list to the right of *Select the menu that will be used for calls made during business hours.*
- Select the menu you want for **out of business hours** by using the drop down list to the right of *Select the menu that will be used for calls off business hours.*
- Click on the **Save** button.

Account Information - Menu Assignments
Auto-Attendants in department: LSI - Lab Second Floor - EndPoint Packs (root)

Select the menu that will be used on holidays: **12 - Holiday**

Select the menu that will be used for calls made during business hours: **10 - Day**

Select the menu that will be used for calls off business hours: **11 - Night**

Save

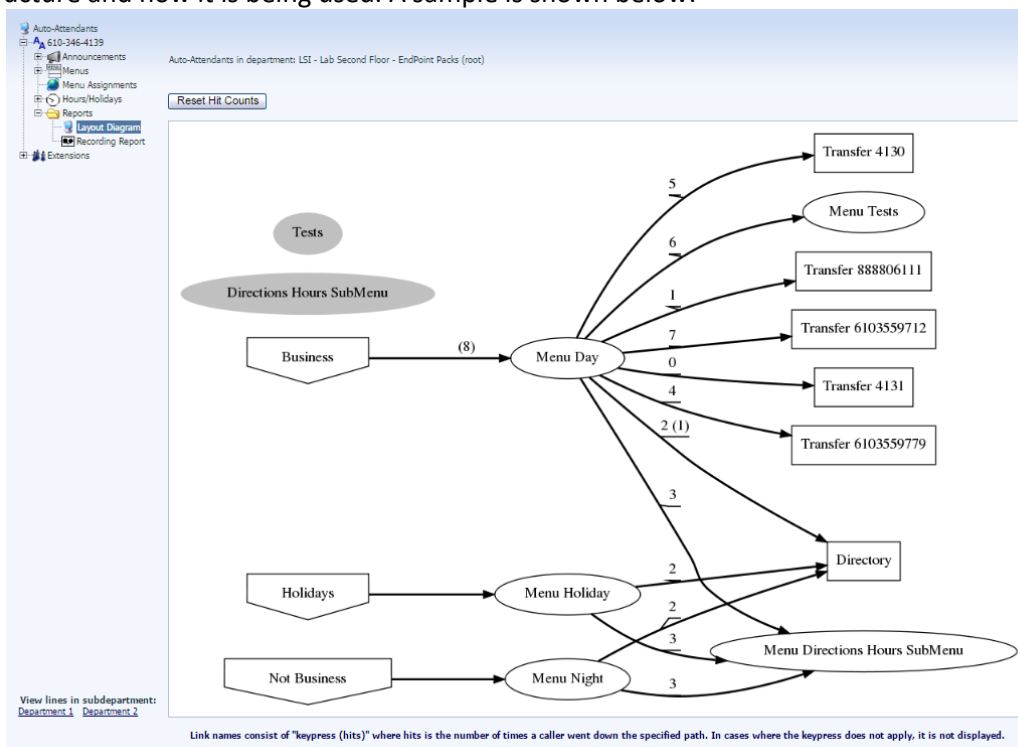
You can change the assigned menus at any time by accessing this portion of your auto attendant then clicking on the **Save** button. For example, you may want to pre-configure an “Emergency” announcement and menu to be used in case of inclement weather. Then if the adverse weather falls on a normal business day you, can easily choose that menu from the drop-down list in this section for a manual override.

5.4.6 N Series: Reports

The Reports entry in the tree allows you to view the menu structure you have set up, how many calls your attendant has handled and how many people are choosing each menu option, and a summary of the recordings you have created.

Layout Diagram

The Layout diagram under the Reports heading of the Auto Attendant allows you to view the overall menu structure and how it is being used. A sample is shown below:



The Layout Diagram is a graphical representation of the call flow for the Auto Attendant, including the number of calls that have progressed through each path since the hit counts have been reset.

- The shapes on the left of the diagram represent the date/time periods defined on the Menu Assignments page: business hours, holidays, and off hours.
- In the center of the diagram, ellipse shapes represent the menu assigned to each period.
- From each menu, an arrow shows the key press for each of the possible options in the menu (or Timeout for the timeout option). The arrow leads to a box showing the action taken for that option: for example, transferring to an extension, playing an announcement, or releasing the call.
- If any calls have passed through the paths in the diagram, the number of calls on each path is shown in parenthesis above the arrow for the path.

If the Auto Attendant is active while you are viewing the report, you can use the Refresh button on your browser to update the display and show the latest call counts.

The **Reset Hit Count** button above the diagram resets all of the call counts in the diagram to zero. This means that, the next time you view the Layout Diagram, it will only show the calls in parenthesis that occurred after the time of reset.

Recording Report

The Recording Report gives you a list of all announcements and extensions on the Auto Attendant, and highlights those which are missing an audio greeting. Announcements that have no associated recording also show up with an exclamation point icon to their left. A sample Recording Report is shown below:

Auto-Attendants in department: LSI - Lab Second Floor - EndPoint Packs (root)

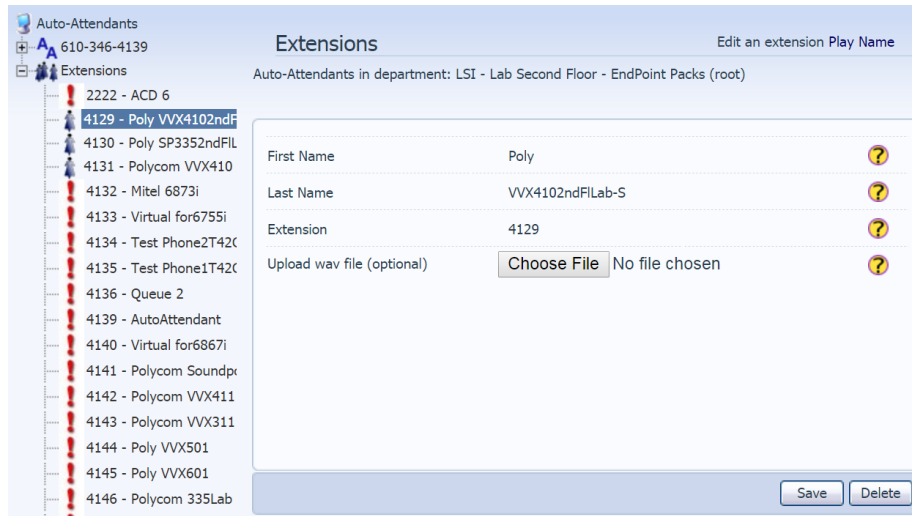
Announcements	
100	Day Day
101	Night Night
102	Holiday Holiday
103	Inclement Weather Announcement when we are closed for inclement weather
104	Directions Hours SubMenu Directions Hours SubMenu
105	Test Test

Extensions	
100	Elaine Bellows
2222	ACD 6
4120	Main TNRCToAA
4122	Jerry Stein
4123	Arthur Vandelay
4124	George Costa
4125	Gen VMBox
4126	Lab 1

Red highlights any announcement or extension for which an auto attendant recording is missing. In the example shown above, the Test announcement and three extension names have not been recorded. The recording of directory extensions is explained in section 5.4.3.

5.4.7 N Series: Extensions

If your Auto Attendant offers a directory option, the directory names must be recorded in order to be searchable. In the Auto Attendant view, all extensions with a red exclamation point by them have no associated recording. Extensions with a grey icon have a recording in place.



To add a recording, you may either upload it via the Auto Attendant access in your CommPortal or you can use the telephone interface to record them (see section 5.4.8 for recording instructions).

To upload recordings for an extension:

- Expand the **Extensions** menu using the + icon to the left of it.
- **Select** the extension you wish to upload a recording for.
- Click on **Browse** and select the recording to upload. This can be in .wav or .mp3 format.
- Click on **Save**.

Note that if you have only just created a new extension or changed the associated line name, it may take 24 hours for that name change to appear in the Auto Attendant system. Additionally, if you reassign a line to a new user, the old recording will remain on that extension until it is re-recorded with the new name.

5.4.8 N Series: Recording Announcements and Extension Names

It is important to make sure all audio is recorded for the auto attendant to work properly. These recordings include announcements and extension names for the users:

- *Announcements (Greetings)* are heard when a caller is interacting with the auto attendant. For example, an announcement may say “Thank you for calling. Please dial 1 for accounting, 2 for shipping...”
- *Extension Name Recordings* are used if you are utilizing the dial by name directory feature on the attendant.

The audio for these may be managed in the CommPortal itself or by calling into the telephone access number as explained below.

Before you begin the recording process, be sure to gather:

- The phone number listed in the portal for the attendant and its password (default password is the last four digits of the phone number)
- All announcement IDs (see end of section 5.4.2) and each announcement’s script
- All extension numbers and their associated names (if using a dial by name directory)

To record attendant announcement using the telephone interface:

1. Call 215-391-4991 from any phone
2. When prompted, enter your attendant account phone number and password (the default password is the last four digits of the telephone number)
3. Press 2 to manage announcements
4. Enter the announcement ID of the announcement you want to record
5. Follow the prompt to listen to, record, and save the initial announcement and any other key announcements

To record the extension names using the telephone interface:

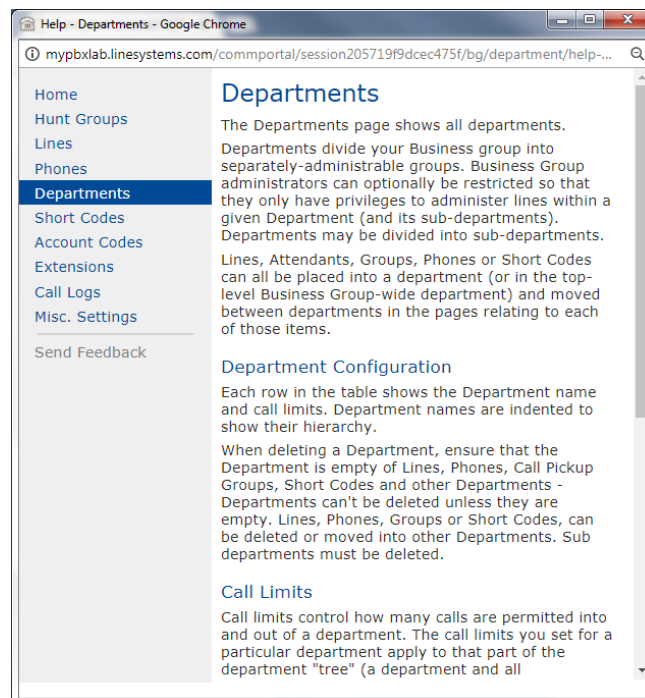
1. Call 215-391-4991 from any phone
2. When prompted, enter your attendant account phone number and password (the default password is the last four digits of the telephone number)
3. Press 3 to manage extensions names
4. Enter the extension of the user whose name you want to record
5. Follow the prompt to listen to, record, and save the name recording

Remember, only users that have recorded names are searchable in dial by name/voicemail features. The name recording of the user's voicemail is separate from the N Series attendant dial by name directory function, so be sure to complete this step.

6 Help

The administrator CommPortal has a basic help guide embedded within the interface. Click the Help section at the bottom of the left pane to launch the guide.


The guide will appear in a new screen- simply review the information and click the section title to navigate to a different section.



7 Troubleshooting

Below are some common questions you may receive as the administrator that you may be able to investigate further and modify yourself. As always, the Telesystem customer care team is available 24/7 and happy to assist. Please do not hesitate to call us.

Users are not receiving or cannot receive voicemails.

- Check whether the voicemail box is full. You can do this by logging in to the administrator Portal and viewing their individual Portal. If the voicemail box is full, a caution icon  will appear on the top left of the screen. The user must delete some or all of the messages in order to receive any new messages (this can be done via the User CommPortal).
- Check the voicemail notification settings. If email distribution has been chosen, confirm that the email address is correct. If this needs to be changed, you may update them appropriately in the Administrator portal (see section 3.1.1.3.3).

Users have forgotten their voicemail/CommPortal code (password/PIN).

- To reset a user's PIN, you may log into your administrator account and view their user Portal to change the PIN (see section 3.1.1.4).
- If the user has not only forgotten their PIN, but has locked the account with too many attempts, you must unlock the account (see section 3.1.5).

You have or have added the Dial by Name Directory option to your Auto Attendant, but some or all users are not searchable, or the system is not searching in the desired manner.

If you have an N Series Auto Attendant:

- Check to make sure that your Directory Matching Method is working as you intend- by either first or last name (see section 5.4.1).
- Check to make sure that the extension in question has an appropriate recording associated with it (see section 5.4.8). *Only extensions that are recorded within the n series auto attendant are searchable.*

If you have a Premium Auto Attendant:

- Check to make sure that your Directory Matching Method is working as you intend- by either first or last name (see section 5.4.1).
- Check to make sure that the extension in question has an appropriate recording associated with it (see section 5.3.6). *Only extensions that are recorded are searchable.*

When receiving a call from another extension, the Line Name showing on the receiving phone is incorrect.

- Make sure the Line Name assigned to that extension is correct (see section 3.1.2).
- For certain phone models or large deployments, you may need to update the intercom name (see section 3.1.1.3.2).
- If you have recently made a change to a user's line name, you must wait overnight for the change to fully take effect (or reboot all phones- see below).
- Make sure the internal directory has downloaded the update on the receiving phone (applicable for legacy Aastra phone models).

If you have a Mitel/Aastra 67xx model phone system:

- If you have recently changed the name of this extension, you may have to trigger corporate-wide reboot. The nature of Aastra systems usually requires that phones be rebooted manually or a change be made on the master profile in order for the internal directory to be updated. If you do not decide to reboot phones manually, you can make an



innocuous change to each the master profile(s) as described below. This will cause all phones to update overnight.

- To make a change to the parent profile, you will go to the group profiles' Table View. See section 3.4.4 for directions on accessing this. In the profile, you may make an innocuous change such as the backlight timeout (*User-Preferences-Backlight-Timeout*, then increase or decrease by one second). Save changes.


Users are having trouble answering incoming calls while already on the line with a caller (Aastra/Mitel phones only).

- By default, Aastra phones are set up with call waiting that switches the screen focus to the ringing line. This means that if the user is talking to someone on their first line and another incoming call comes in, three things happen: a call waiting beep sounds, the line where the new call is coming in upon flashes rapidly, and the dynamic screen changes to show the new caller ID information. Because the screen changes (switches focus to the ringing line), the user cannot transfer the current call. They can either ignore the new call or put the current call on hold to answer it. To keep the call waiting feature, but stop the phone from switching focus, the administrator can modify that individual or group profile in the following place:

Switch Focus for built-in models of Mitel/Aastra (see section 3.4.3.1):

- In the **Phones** view, click on the **configure phone** icon  to manage an individual's settings or **manage phone profiles** link to manage your group's profile.
- Click on the **table view** icon  on the bottom of the profile screen.
- Go to *Phone Profile- User-Preferences-Backlight-Switch Focus to Ringing Line* and uncheck the checkbox on the right side.
- **Save** changes and either reboot phone or wait for it to update overnight.

Switch Focus for End Point Pack models of Mitel/Aastra (see section 3.4.3.2):

- In the **Phones** view, click on the **configure phone** icon  to manage an individual's settings or **manage phone profiles** link to manage your group's profile.
- Go to *User-Preferences-Backlight-Switch Focus to Ringing Line* and choose "No".
- **Save** changes and either reboot phone or wait for it to update overnight.