

Quick Reference Guide


Administrator Quick Reference Guide - Release 4.0

This reference guide describes common administrative tasks on a tenant site. See the Administrator Reference Guide for general information and task option details.

Logging into the administrator interface

- 1 Open your Web browser (minimum Internet Explorer 6.0 or Firefox 1.5.0.4).
- 2 Enter the URL for the web administration interface (issued by your service provider). The Login screen appears.
- 3 Enter your extension and PIN (issued by your service provider).
- 4 The Web page displays your personal settings, directories, and the company settings.
- 5 Select **Company Settings** on the menu frame to view the administrative actions available to you.


You can reach the administrator work areas in one of two ways: by the Menu options or by the categories of options in the Main frame. The example below shows the Main frame options that appear when you select **Company Settings** in the left Menu.

Menu	Main frame												
<ul style="list-style-type: none">My Settings<ul style="list-style-type: none">My Personal DetailsMy PhoneMy Call CoverageMy Call GroupsCompany Directories<ul style="list-style-type: none">Internal DirectoryExternal DirectoryCompany Settings<ul style="list-style-type: none">Users and LocationsProfilesExternal Directory / Speed DialsUsers and LocationsProfilesExternal Directory / Speed Dials<ul style="list-style-type: none">Call GroupsAuto AttendantIncoming Call RoutingBusiness DetailsPhone Inventory	<p>Company Settings</p> <p>Use these web pages to manage the users, features, and services associated with your company's phone system. Select a task from the list below or from the menu on the left.</p> <p>To obtain context-specific help in any section select the  icon or select Help in the top right corner of any page.</p> <table border="1"><thead><tr><th>Users and Locations</th><th>Profiles</th><th>External Directory / Speed Dials</th></tr></thead><tbody><tr><td><ul style="list-style-type: none">View, edit, delete, copy, disable a user/locationAdd a userAdd a location</td><td><ul style="list-style-type: none">View, edit, delete profilesAdd a phone key profileAdd a call permission profile</td><td><ul style="list-style-type: none">View, edit, delete external directory (speed dial) entriesAdd a company speed dial</td></tr></tbody></table> <table border="1"><thead><tr><th>Call Groups</th><th>Phone Inventory</th><th>General</th></tr></thead><tbody><tr><td><ul style="list-style-type: none">View, edit, delete call groupsAdd a broadcast groupAdd a hunt groupAdd a Monitor groupAdd a rollover group</td><td><ul style="list-style-type: none">View, edit, delete phones</td><td><ul style="list-style-type: none">View and edit business detailsView and edit routing detailsView and edit auto attendants</td></tr></tbody></table>	Users and Locations	Profiles	External Directory / Speed Dials	<ul style="list-style-type: none">View, edit, delete, copy, disable a user/locationAdd a userAdd a location	<ul style="list-style-type: none">View, edit, delete profilesAdd a phone key profileAdd a call permission profile	<ul style="list-style-type: none">View, edit, delete external directory (speed dial) entriesAdd a company speed dial	Call Groups	Phone Inventory	General	<ul style="list-style-type: none">View, edit, delete call groupsAdd a broadcast groupAdd a hunt groupAdd a Monitor groupAdd a rollover group	<ul style="list-style-type: none">View, edit, delete phones	<ul style="list-style-type: none">View and edit business detailsView and edit routing detailsView and edit auto attendants
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Getting access to online Help

Help topics provide information about the settings and controls that you are using on the current page.



- Click Help at the bottom or the top-right corner of a page. The topic for administering the phone system appears in a Help window.
- Click the  icon on any page to open the context Help of the current topic.
- Click any of the blue hyperlinks (e.g. Customizing your phone system) to view a topic or select a topic in the left frame of the Help window.

The Help system also contains the following controls:

- Contents-displays the Help table of contents
- Search-enables you to search on a keyword
- Back-enables you to navigate to the previously-viewed topic
- Print-prints the topic

Users and locations

Users and Locations > Add a user and Add a location

Add users or locations for your business and configure some services and profiles.

- Enter general information—name, number, email
- Enter **Phone Information**—extension, language setting, outgoing calling ID, enable Handsfree Answerback



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- Enable services such as
 - Dialing from Auto Attendant (by extension or name directories)
 - Twinning
 - Voice mail
- Check **Administrator Privileges** if you want to give the user the ability to perform tenant administration tasks, such as adding users, adding profiles, etc.
- Set phone key and permission profile
- For a new user or location, plug in and log into a phone.

Note: You can also modify an existing user or location by clicking *View, edit, delete, copy, disable a user/location*.

Permission profiles

Profiles > Add a call permission profile

Add/assign/modify outbound call permissions to users. You create the set of permissions (the profile) and add users to the profile membership.

- **Call Type**—Set the permission for a type of call for the company’s business hours (set in Business Details).
- **Other**—Route inbound calls to external numbers and select long distance or service providers.
- **Membership**—Add users to the permission profile.

Call Groups

Call Groups > Add a broadcast group or Add a hunt group or Add a Monitor group or Add a rollover group

Add/modify a calling group and assign members to the following group types:

- **Add a broadcast group**—Calls are routed to all members of this group; all phones can ring or only those not in use
- **Add a hunt group calls**—Calls to a linear hunt group are routed to each group member in turn, and always start with the first member listed; calls to a circular hunt group are routed in the same way, but the starting member role rotates among members
- **Add a Monitor group**—Members (secondary) can monitor calls of another member (primary)
- **Add a rollover group**—A call rings the phones of a rollover group one at a time until the call is answered or sent to call coverage
- **Call group coverage**—Specify coverage if none of the group members answers the call. Select **Call group** Menu option, click the group name, and edit the **Call Coverage** section.

Business details

General > View and edit business details

Specify business details, including setting your company’s business hours, extension, hold announcements, and account codes that can associate outgoing and inbound calls to particular clients or accounts.

- **Business hours**—View and set your operating hours, lunch, and special hours for each business day.
- **Extension Management**—View minimum and maximum numbers in extension ranges for users, locations, call groups, and auto attendants
- **Hold announcement**—Select a hold announcement from your service provider. Consult your service provider about customized announcements.
- **Account codes**—Enable/disable minimum and maximum account codes lengths

Auto attendants

General > View and edit auto attendants

Add/modify auto attendants your business with time of day greetings. You can also access the auto attendant configuration options from this page and add auto attendant menus and sub-menus. You can use default or custom recorded greetings.

- **General information**—Enter name, extension, default language
- **Time of Day Greeting**—Choose Morning, Afternoon, Evening greetings (optional)
- **Main Menu** link—Click to view the auto attendant options page

Incoming call routing

Select *Incoming call routing* in the Menu.

Define which phone or group of phones or auto attendant will ring when there is a call to your Direct Inward Dial numbers. You can also apply an emergency override.

- **Emergency Override Routing** section—Enable this option to route calls to another number (auto attendant, calling group, user or location, other number) overriding the Time of Day Routing.
- **Time of Day Routing** section—Select a destination (auto attendant, calling group, user or location) to which calls to your Direct Inward Dial (DID) numbers are routed according to Open, Closed, Lunch, and Special times of day (set in Business Details).