



# SmartLink HPBX Administrator Guide

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# 1 Introduction

## *Welcome to your new phone system!*

This guide is intended to help Administrators of a **Norvado SmartLink HPBX** phone system perform the various tasks needed to administer the system, such as

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

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

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

## 2 CommPortal Business Group Administrator (BG Admin)

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

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

The second of these interfaces is the one which you will use to administer the phone system and is described by this document. For more details on using the first interface, please see the Norvado SmartLink HPBX *End User Guide*.

### 2.1 Accessing the CommPortal BG Admin interface

To configure BG lines, and to manage their BG's lines and services, a BG Administrator should log in to the CommPortal BG Admin interface using a separate login page to regular users. BG Line Users log in at <http://myphone.norvado.com/>, a BG Administrator logs in at <http://myphone.norvado.com/bg>. The BG Administrator login page sends the BG Administrator to the BG Administrator section of the default web UI.

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

- Microsoft Internet Explorer version 11
- Edge
- Firefox version 3 or later
- Google Chrome (Windows only)
- Safari version 5 or later (Mac OS X only)

It is supported on the following operating systems:

- Microsoft Windows Vista
- Microsoft Windows 7
- Microsoft Windows 8
- Microsoft Windows 10
- Mac OS X 10.6, Snow Leopard and later, although some features are only supported by later versions

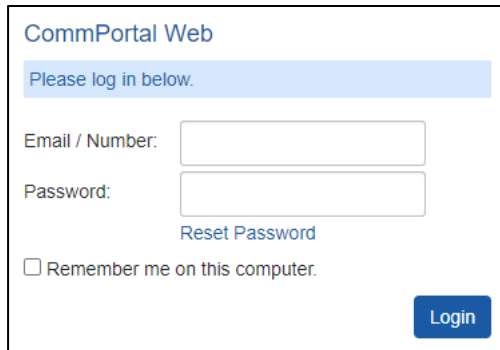
*JavaScript must be enabled.*

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## 2.2 Logging into CommPortal BG Admin

The following shows a sample CommPortal login page.

**Figure 1: CommPortal login page**



CommPortal Web

Please log in below.

Email / Number:

Password:

[Reset Password](#)

Remember me on this computer.

[Login](#)

To log into CommPortal, follow these steps:

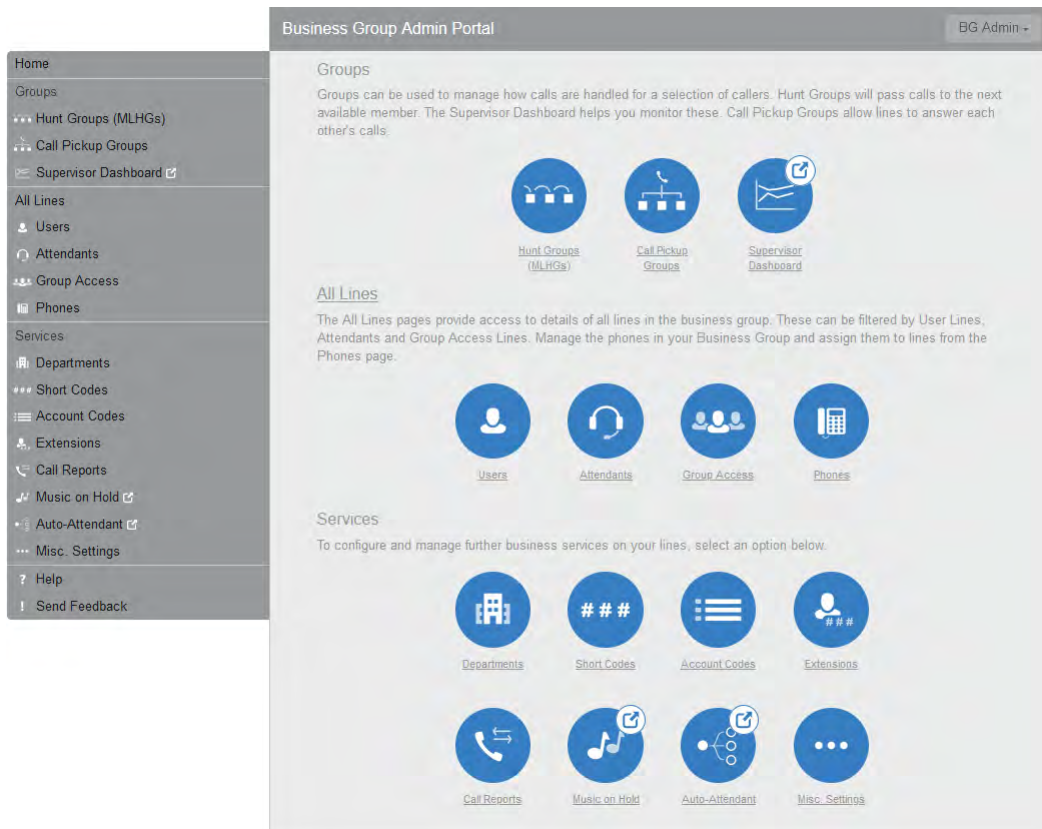
1. Enter a phone number with administrative access.
2. Enter the password.
3. Click on *Login*.

If this is the first time you have logged in, you will be prompted to change your password.

## 2.3 Using CommPortal BG Admin

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

Figure 2: CommPortal Business Group Administrator homepage



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

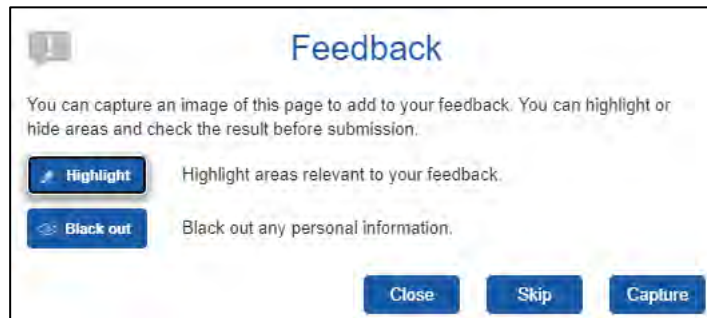


### 2.3.1 Send Feedback

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

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

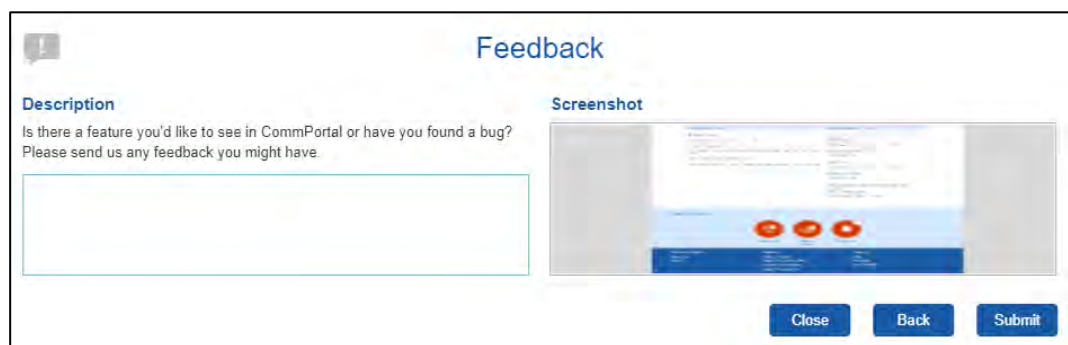
**Figure 3: Send Feedback first pop-up**



If you want to include a screenshot of the BG interface:

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

**Figure 4: Send Feedback second pop-up**



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

### 3 Managing Lines with BG Admin

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

**Figure 5: CommPortal Business Group Admin Lines display**

The screenshot shows the 'Business Group Admin Portal' interface. At the top, there is a header with 'Business Group Admin Portal' and a 'BG Admin' dropdown. Below the header, there is a section titled 'Lines in Department:' with a 'View All' dropdown. Underneath, there are buttons for 'Assign Routing...', 'Assign to Call Service Group...', and 'Download all Lines'. A 'Move selected to:' section includes a 'Select department' dropdown and a 'Move' button. Below this is a search bar with 'Search for...' and a dropdown for 'in any field'. The main content is a table with the following columns: Phone Number, Ext., Name, CSG, Routing, First TG to try, and Department. The table lists six lines with various details and icons for actions.

Phone Number	Ext.	Name	CSG	Routing	First TG to try	Department
(704) 555 0105		Erika Mustermann	None			MetaSwitch
(704) 555 0106		Jon Jonsson	None			MetaSwitch
(704) 555 0107		MADN_name_1	None			MetaSwitch
(704) 555 0108		DID_sub_1	None	RP1	TG104	MetaSwitch
(704) 555 0110		Alpha	-			MetaSwitch
(704) 555 0135	135	MADN_name_2	None			MetaSwitch

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

#### Business Groups with more than 10,000 lines

*Business Groups can support up to a maximum of 40,000 lines. Any Business Group that has more than 10,000 lines will be configured slightly differently as follows.*

If you are a BG Admin in a Business Group that is configured to support more than 10,000 lines, you should note the following:

- All lines must be in a specific Department. You will see a warning if there are any lines that are in the root Department and will be prompted to move them to a sub-Department.
- If you are an administrator of the root Department for this Business Group, you will not see a list of all lines but will be prompted to select a department (which could be the root Department).
- If you are an administrator for the entire Business Group, you will see all lines within the Business Group.

## 3.2 Working with your Business Group Lines

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

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

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

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

- view individual settings or view line settings to view configuration for the selected line
- view group settings for this line (if the Line is a member of a Group, for example a Hunt Group)
- edit personal details, for example renaming the line
- add services to the line
- reset the line, as described in 3.2.1
- unlock the account.

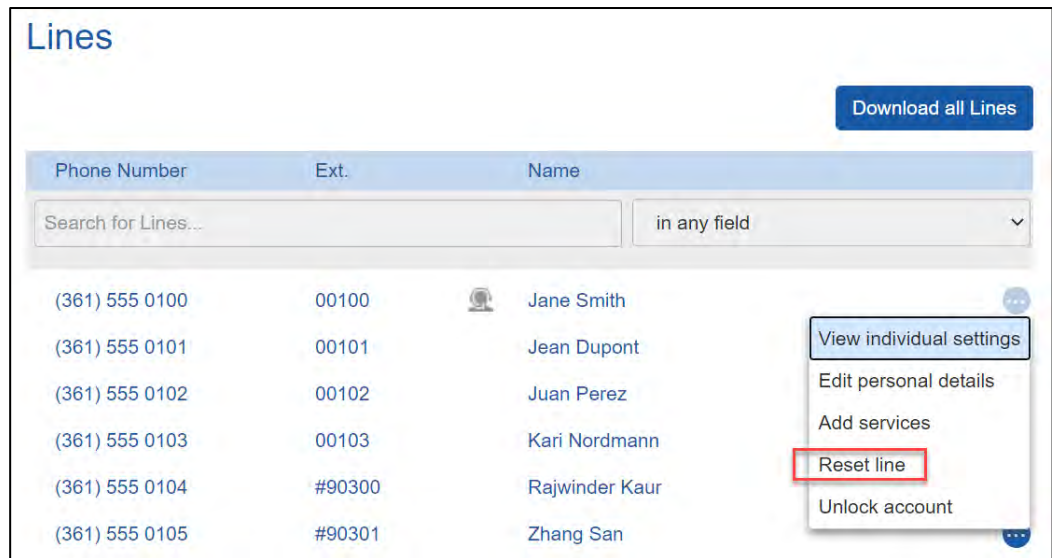
### 3.2.1 Resetting a Business Group Line

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

To reset the line:

- Expand the **Actions** icon alongside the line.
- Select *Reset line*.

Figure 6: Actions drop-down



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

### 3.2.2 Moving Lines Between Departments

To move lines between departments, follow these steps:

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

### 3.2.3 Logging Into a User's Account

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

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

For more details on modifying settings on behalf of an individual user see the *Norvado SmartLink HPBX End User Guide*.

## 3.3 Departments

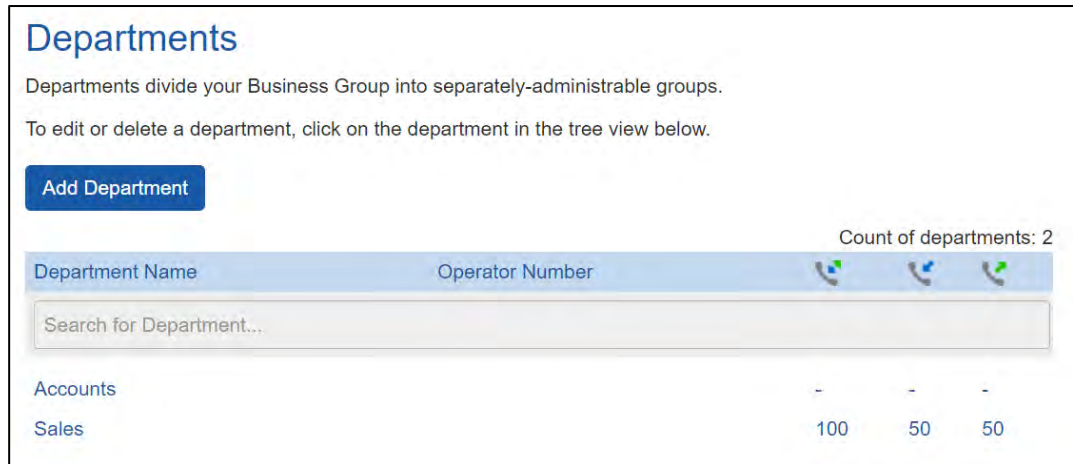
Your Business Group may have a number of departments. You may be able to use the following options in the CommPortal Business Group Admin interface to view and manage your departments. The *Departments* link is only visible to root BG Admins.

### 3.3.1 Managing Departments

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

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

**Figure 7: Departments page**



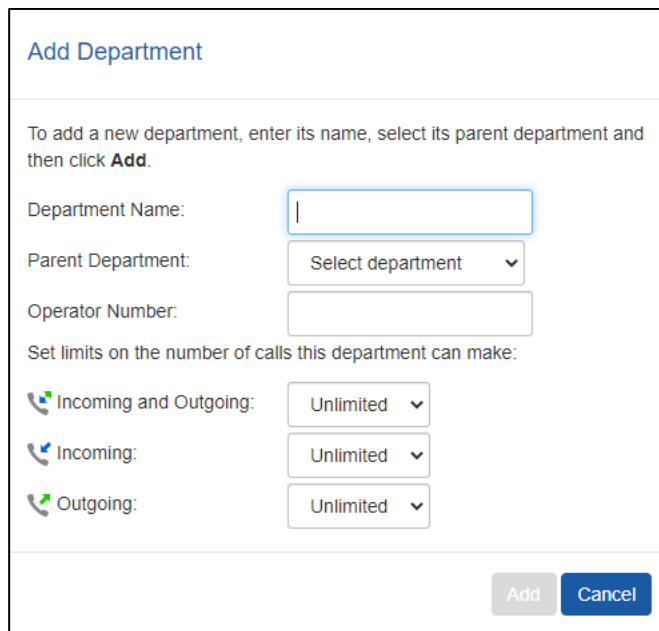
If you have a very large number of departments, you can use the *Search for* box to find a department. As you type, matching departments are shown, with the matching text highlighted in yellow.

### 3.3.2 Adding Departments

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

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

**Figure 8: Add Department dialog box**



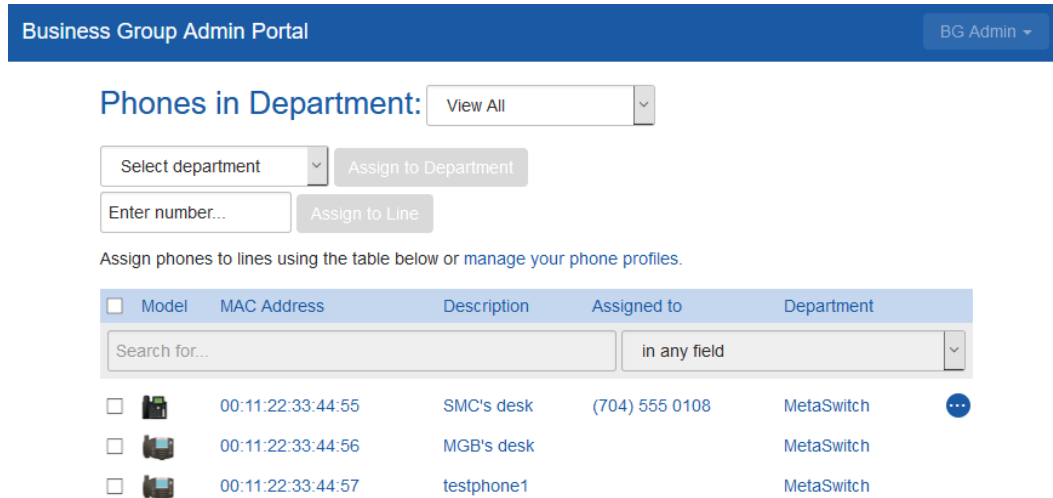
1. From the BG Admin Page select the *Departments* link on the left of the page. Click the *Add Department* button at the top of the page and the dialog shown above will appear.
  2. Enter the following information.
    - Department Name
    - Parent Directory – If this is a top-level department, you will use the Business Group Name. If this is a sub department, this will be the upper-level department
    - Operator Number – Enter the number of the line that will act as operator for this department
      - Your deployment may be configured so that individual subscribers can configure a different number here, for example if they want calls that go to voicemail to be directed to their mobile phone rather than their office receptionist.
    - If you plan to limit the number of calls allowed for this department, enter the following information
      1. Incoming & Outgoing – Enter the total number of combined concurrent calls that this department will be permitted to have active at any given time.
      2. Incoming – Enter the total number of concurrent incoming calls that this department will be permitted to have active at any given time.
      3. Outgoing – Enter the number of concurrent outgoing calls that this department will be permitted to have active at any given time.
- NOTE: To allow any mix of incoming & outgoing enter the same value in all three fields or set both the Incoming and the Outgoing fields to Unlimited.

Some example departments are shown in 3.3.1.

## 4 Managing Phones with BG Admin

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

**Figure 9: CommPortal Business Group Admin Phones display**

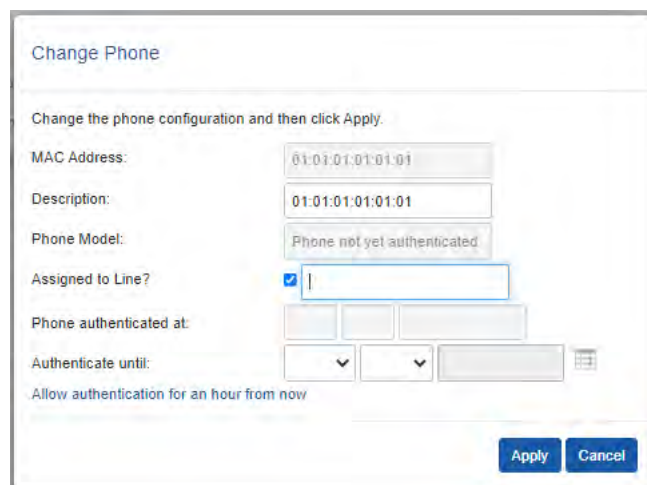


This page shows you all of the known phones in the current department. To view the phones in sub-departments, select a different department using the drop-down list at the top of the page.

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

- **Change phone** – make changes to an individual phone, for example to modify its description or allocate it to a line.
- **Configure phone** – access the phone profile for this individual phone so that you can make changes to it, as described in the following sections:

**Figure 10: Change Phone dialog box**





## 4.1 Modify Phone Description

To change the description given to a phone, follow these steps:

1. Click on the phone entry, or use **Actions, Change Phone** to launch the pop-up shown in Figure 10: Change Phone dialog box.
2. Enter the new description.
3. Click on the *Apply* button.

## 4.2 Moving Phones Between Departments

To move a phone between departments, follow these steps:

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

## 4.3 Assigning a Phone to a Line

To assign a phone to a line, follow these steps:

1. Select the phone you wish to assign a line to using the checkbox to the left of the phone.
2. Enter the number of the line you wish to assign to the phone using the ***Enter number*** ... box at the top of the page.
3. Click on the ***Assign to Line*** button.

## 4.4 Removing a Phone from a Line

You may wish to remove a phone from a line if, for example, the phone breaks and you need to assign a new phone to the user's line.

To remove a phone from a line, follow these steps:

1. Select the phone by using the checkbox to the left of the phone.
2. Select the department the unassigned phone should be part of using the drop-down at the top of the page.
3. Click on the ***Assign to Department*** button.

## 4.5 Phone profiles – Endpoint Pack Phones

### 4.5.1 Managing Phone Profiles

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

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

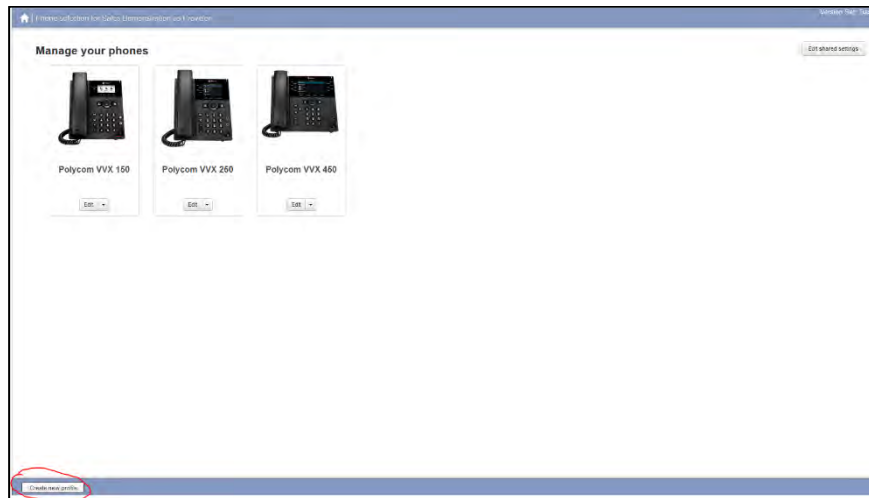
**Figure 11: Default Phone Profile Editor**



## 4.5.2 Adding a New Phone Profile

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

**Figure 12: Create New Profile dialog box**

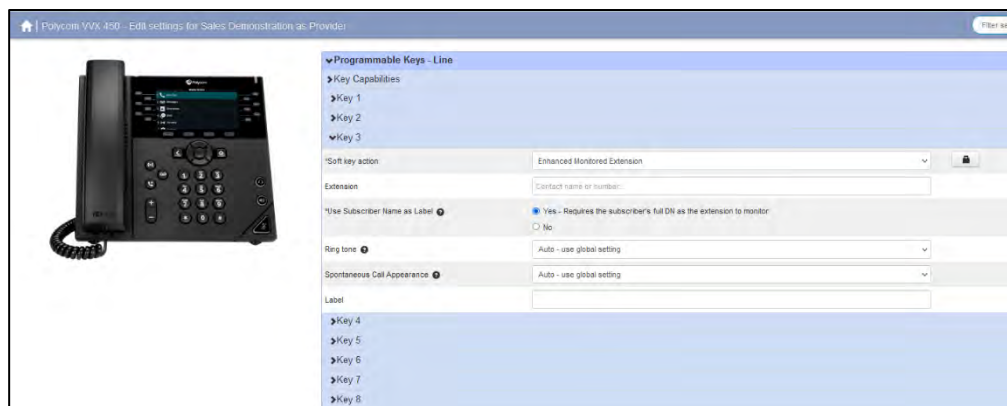


1. Click on the **Create new profile** button at the bottom left of the screen to launch the Create new profile screen which displays pictures of the handsets of all the available phone models.
2. Select the model of phone you want to create a profile for.
3. Click on **OK**.
4. A default profile for the phone will now appear in the Phone Profile Editor.

## 4.5.3 Modifying a Phone Profile

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

Figure 13: Modifying a phone profile



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

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

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

- x Once all the settings have been imported, you can review the changes before saving them. Valid changes that have been imported are shown in blue. Any invalid changes are shown in red.
9. To save your changes permanently:
    - x If your system supports the feature, you will see an **Update phone(s) immediately when saving** option on the bottom of the UI. Tick this option if you want the changes to be sent to the phone immediately when you select *Save changes*, rather than waiting for it to be rebooted.
    - x Click on *Save changes*. Unless you have ticked **Update phone(s) immediately when saving**, changes won't be applied to the phones themselves until they are next rebooted.
  10. To abandon any changes you have made in this session, or since you last saved, click on *Discard Changes*.

#### 4.5.4 Logging out of the Phone Profile Editor

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

### 4.6 Modifying Phone Configuration as a User

To log into and modify the phone settings as one of your users, follow these steps:

1. Click on the **Individual Line** icon to the right of the phone.
2. Follow the instructions on using the Phone Configurator to manage the configuration of individual phones which are given in the *Norvado SmartLink HPBX End User Guide*.

### 4.7 Copying Phone Configuration

To copy the configuration from one phone to another, follow these steps:

1. Modify the old phone as the user, by clicking on the **Individual Line** icon to the right of the phone.
2. Go to the table view, using the table view icon to the bottom right of the screen.
3. Select the **Phone Profile** object.
4. Select **Edit > Copy**.
5. Exit the Phone Configurator by closing the window.
6. Now log into the new phone as the user.
7. Go to the table view.
8. Select the Phone Profile object.
9. Select **Edit > Paste**.
10. Click on **Save Changes**.

## 4.8 Installing a New Phone

To install a new phone, follow these steps.

1. Ensure the phone is compatible with our service. If you have bought the phone from *Norvado* or one of our approved partners, it will be compatible.
2. If you need to connect a PC to the network through the phone, connect the computer's Ethernet cable into the PC jack of the phone.
3. Connect a spare telephone Ethernet cable into the LAN or Network socket of the new phone and connect to you network jack.
4. The phone should now power up and retrieve its configuration from our server.
5. Once the phone has fully powered up, if there is no phone number configured on the phone you will need to assign the phone to a spare line to the phone using CommPortal. See section 4.3 for instructions on how to do this.

## 4.9 Replacing with an Identical Phone Model

To replace a phone with one of an identical model, follow these steps:

1. Using CommPortal, copy the configuration of the existing phone to the new phone by following the instructions in Section 4.7.
2. Using CommPortal, remove the existing phone from the phone line, by following the instructions in section 4.4.
3. Using CommPortal, add the new phone to the line which was removed from the old line, by following the instructions in section 4.3.

**Note:** The new phone must be in the same department as the phone being replaced. If it isn't, you or another administrator with sufficient permissions must move the phone to the appropriate department before you can assign the line to it. Follow the instructions in section 4.2 to perform this task.

1. Unplug the computer's Ethernet cable from the old phone if one is plugged in.
2. Unplug the telephone Ethernet cable from the old phone.
3. Plug the computer's Ethernet cable into the PC socket of the new phone.
4. Plug the telephone Ethernet cable into the new phone.
5. The new phone should now power up and retrieve its configuration from the server. The new phone will be configured identically to the old phone.

### 4.9.1 Replacing with a Different Phone Model

To replace a phone with one of a different model, follow these steps:

1. Using CommPortal, remove the existing phone from the phone line, by following the instructions in section 4.4.
2. Using CommPortal, add the new phone to the line which was removed from the old line, by following the instructions in section 4.3.

**Note:** The new phone must be in the same department as the phone being replaced. If it isn't, you or another administrator with sufficient permissions must move the phone to the appropriate department before you can assign the line to it.

Follow the instructions in section 4.2 to perform this task.

3. Unplug the computer's Ethernet cable from the old phone if one is plugged in.
4. Unplug the telephone Ethernet cable from the old phone.
5. Plug the computer's Ethernet cable into the PC socket of the new phone.
6. Plug the telephone Ethernet cable into the new phone.
7. The new phone should now power up and retrieve its configuration from the server. It will have the default configuration defined by any department profiles and can now be configured by the phone user. For more information on department phone profiles, see section 4.5.

## 5 Managing Hunt Groups (Multi Line Hunt Groups (MLHGs))

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

### 5.1 Viewing Hunt Groups

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

**Figure 14: CommPortal Business Group Admin Hunt Groups (MLHGs) display**

Business Group Admin Portal Josef Novak ▾

**Hunt Groups in Department:** View All ▾

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

Move selected to: Select department ▾ Move

<input type="checkbox"/>	Hunt Group Name	Number of Members	Service Level	Department
<input type="checkbox"/>	Accounts	3	Premium ACD	None
<input type="checkbox"/>	Marketing	2	Premium ACD	None
<input type="checkbox"/>	Sales	1	Basic ACD	None
<input type="checkbox"/>	Support	3	Hunt Group	None

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

### 5.2 Moving MLHGs to Another Department

To move an MLHG between departments, follow these steps:

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



## 5.3 Viewing and Modifying Hunt Groups

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

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

### 5.3.1 Hunt Group Pilots

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

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

### 5.3.2 Hunt Group Members

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

Figure 15: Hunt Group Lines tab

Position	Telephone Number	Ext.	Name	Department
<input type="checkbox"/> 1	(361) 555 0104	#90300	Rajwinder Kaur	None
<input type="checkbox"/> 2	(361) 555 0103	00103	Kari Nordmann	None
<input type="checkbox"/> 3	(361) 555 0100	00100	Jane Smith	None

### 5.3.3 Adding Lines

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

1. If you know the number, enter it in the text box on the top right and click **Add**.
  - Note that if you want to add an external line to the Hunt Group, you must add it by specifying its full directory number in the text box. You cannot select from a list because this line is not a member of your Business Group.

- You cannot add external lines to an MLHG that uses the Integrated ACD service described in 5.4.
2. If you don't know the number, click on **Add Lines**. To select one or more lines to add, use the checkboxes to the left of the lines and click **Add Selected**.

**Figure 16: Add Lines to Hunt Group dialog box**

Add Lines to Hunt Group

Select the lines by ticking the boxes and then click Add Selected. Lines are not allowed to login/logout of this Hunt Group and when you add a line, it will immediately be logged in.

Department: Accounts

<input type="checkbox"/>	Telephone Number	Extension	Name
<input type="checkbox"/>	(361) 555 0101	00101	Jean Dupont
<input type="checkbox"/>	(361) 555 0102	00102	Juan Perez
<input type="checkbox"/>	(361) 555 0105	#90301	Zhang San

Add Selected Cancel

### 5.3.4 Removing Lines

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

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

### 5.3.5 Changing Positions

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

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

**Figure 17: Change Line Positions in MLHG dialog box**

Change Member Positions in Hunt Group

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

Position	Telephone Number	Ext.	Name	Department
1	(361) 555 0104	#90300	Rajwinder Kaur	None
2	(361) 555 0103	00103	Kari Nordmann	None
3	(361) 555 0100	00100	Jane Smith	None

### 5.3.6 Settings

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

### 5.3.7 Preferences

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

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

### 5.3.8 Hunt Settings

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

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

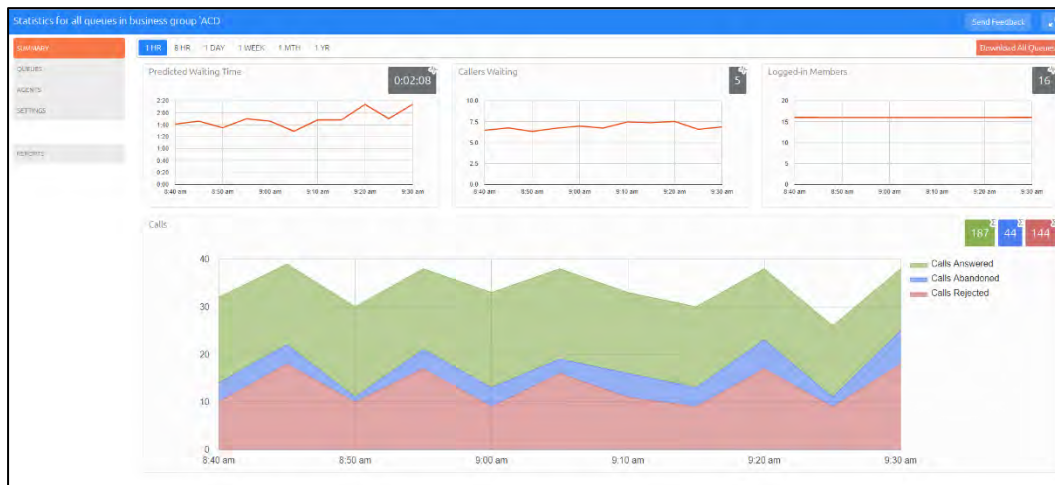
## 5.4 Integrated ACD

If you have the Integrated ACD (Automated Call Distribution) feature in your deployment, the **Supervisor Dashboard** link on the left-hand menu in CommPortal allows you to access detailed current and historical information about the call queues and agents in the MLHG(s) that you administer and generate reports.

In this interface, the term 'queue' refers to an MLHG and 'agent' to its members.

Clicking the **Supervisor Dashboard** button launches the Summary screen in a new browser window.

**Figure 18: BG Administrator Summary statistics screen**



You should refer to your Integrated ACD documentation for detailed information on the features provided by Integrated ACD, including the configuration options that you can change using the **Settings** tab on the **Supervisor Dashboard**.

## 6 Managing Short Codes

### 6.1 Viewing Short Codes

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

**Figure 19: CommPortal Business Group Admin Short Codes display**

Business Group Admin Portal Maria Lopez ▾

**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 Import Export All

<input type="checkbox"/>	Short Code	Name	Telephone Number or Service Access Code	Department
Search for...				
<input type="checkbox"/>	07	Enfield Sales	(704) 555 0107	MetaSwitch
<input type="checkbox"/>	08	Enfield Support	(704) 555 0108	MetaSwitch
<input type="checkbox"/>	09 - 13	Central	(704) 555 0109 - (704) 555 0113	MetaSwitch

- To view Short Codes in sub-departments, select the sub-department from the drop-down list at the top of the page.
- To view all of the Short Codes for all departments, select **View All** from the department drop-down list.
- You will only see the **Import** and **Export All** buttons if you are a root administrator for the Business Group. These options allow you to add large numbers of short codes and/or short code ranges, and are described in **6.8, Importing and Exporting Short Codes**. A Business Group can have up to 10,000 short codes and/or short code ranges, of which 1,000 can have names.

### 6.2 Moving Short Codes to Another Department

To move Short Codes between departments, follow these steps:

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

## 6.3 Adding Short Codes

To create a new Short Code, follow these steps:

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

**Figure 20: Add Single Short Code dialog box**

Add Single Short Code

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

Short Code:

Maps to:  Telephone Number  Service Access Code

Telephone Number:

Department:

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

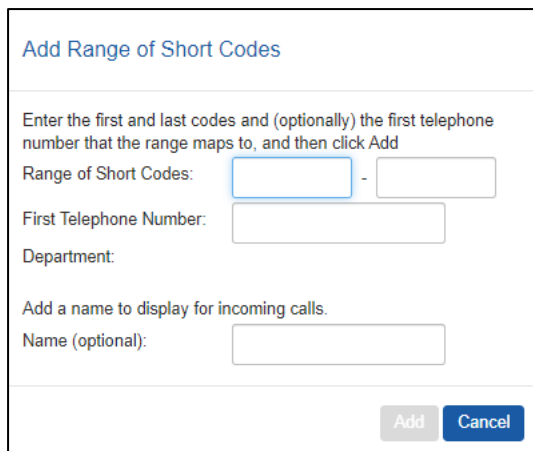
Name (optional):

## 6.4 Adding Short Code Ranges

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

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

**Figure 21: Add Range of Short Codes dialog box**



Add Range of Short Codes

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

Range of Short Codes:  -

First Telephone Number:

Department:

Add a name to display for incoming calls.

Name (optional):

## 6.5 Deleting Short Codes and Short Code ranges

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

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

## 6.6 Modifying Short Codes

To modify an existing Short Code, follow these steps:

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

**Figure 22 : Edit Single Short Code dialog box**

Edit Single Short Code

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

Short Code: \*2002

Telephone Number: (361) 555 0100

Department: Accounts

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

Name (optional): Helpdesk

Save Cancel

## 6.7 Modifying Short Code Ranges

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

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



**Figure 23 : Edit Range of Short Codes dialog box**

Add Range of Short Codes

---

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

Range of Short Codes:  -

First Telephone Number:

Department:

Add a name to display for incoming calls.

Name (optional):

## 6.8 Importing and Exporting Short Codes

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

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

- Import short codes and/or short code ranges from a file in CSV format. This is very useful if you need to add a large number of short codes or short code ranges.
- Export all the short codes and short code ranges that are currently configured in the Business Group in CSV format.

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

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

4. Follow the instructions on the **Import Short Codes** screen to select the CSV file and mandate what should happen if a short code or short code name already exists. Short codes numbers must be unique, but you can use the same name for more than one short code.

**Figure 24: Import Short Codes screen**

Import Short Codes

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

CSV File:

Action when short code exists:

- Overwrite the short code ?
- Ignore imported entry ?

Action when name exists:

- Use new ?
- Keep both ?
- Keep existing ?

Import status

added: 0   updated: 0   deleted: 0   ignored: 0

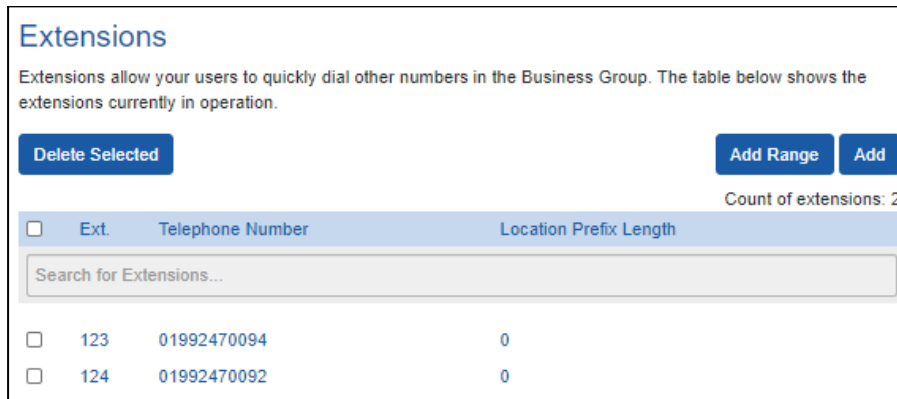
Note: Your BG currently has 2 short codes. You can only import 1000 short codes per import, any other entries will be ignored.

## 7 Managing Extensions

### 7.1 Viewing Extensions

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

**Figure 25: CommPortal Business Group Admin Extensions display**



### 7.2 Adding Extensions

To create a single new Extension, follow these steps:

1. Click on **Add**.
2. Enter the number of the Extension to add.
3. Enter the telephone number of the line in your business that this Extension should map to.
4. If the option is visible, you can also choose to add a location prefix length for this Extension. Location prefixes allow you to set multiple overlapping Extension ranges in your business. These ranges can represent different physical locations and allow calls within a single location without dialing a location prefix. If you do not want to set a location prefix length for this Extension, leave the value as 0.
5. Click on **Add**.

### 7.3 Adding Extension Ranges

To create a new Extension range, follow these steps:

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

4. If the option is visible, you can also choose to add a location prefix length for this Extension range. Location prefixes allow you to set multiple overlapping Extension ranges in your business. These ranges can represent different physical locations and allow calls within a single location without dialing a location prefix. If you do not want to set a location prefix length for this Extension Range, leave the value as 0.
5. Click on **Add**.

**Figure 26: Add Extension Range dialog box**

**Add Range**

To configure a range of extensions, enter the First and Last Codes, the First Telephone Number that the range maps to, and the Location Prefix Length. The prefixed digits specified by the Location Prefix Length form the location of the Extension. Subscribers calling within the same location are able to omit dialing this prefix.

Range of Extensions:  -

First Telephone Number:

Location Prefix Length:

## 7.4 Deleting Extensions and Extension Ranges

To delete Extensions and Extension ranges, follow these steps:

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

## 7.5 Modifying Extensions

To modify an existing Extension, follow these steps:

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

**Figure 27: Edit Single Extension dialog box**

**Edit Single**

To configure a single extension, enter the Code, Telephone Number and Location Prefix Length. The prefixed digits specified by the Location Prefix Length form the location of the Extension. Subscribers calling within the same location are able to omit dialing this prefix.

Extension:

Telephone Number:

Location Prefix Length:

## 7.6 Modifying Extension Ranges

To modify an existing Extension range, follow these steps:

1. Click on either the Extension range numbers, or the phone numbers the Extension range dials.
2. Modify the details.
3. Click on **Save**.

**Figure 28: Edit Extension Range dialog box**

**Edit Range**

To configure a range of extensions, enter the First and Last Codes, the First Telephone Number that the range maps to, and the Location Prefix Length. The prefixed digits specified by the Location Prefix Length form the location of the Extension. Subscribers calling within the same location are able to omit dialing this prefix.

Range of Extensions:  -

First Telephone Number:

Location Prefix Length:

## 8 Managing account codes

### 8.1 Viewing and Modifying Account Code Settings

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

### 8.2 Modifying Settings

#### 8.2.1 Modifying Call Types Requiring Account Codes

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

**Figure 29: CommPortal Business Group Admin Account Codes display**

**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 checked="" type="checkbox"/> National	<input checked="" type="checkbox"/> Operator
<input checked="" type="checkbox"/> International	<input checked="" type="checkbox"/> Directory
<input type="checkbox"/> Local	<input type="checkbox"/> Local Business Group
<input checked="" type="checkbox"/> Premium Rate	<input type="checkbox"/> Other Business Group
<input type="checkbox"/> Mobile	

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  ▼

**Assigned Account Codes**

There are no assigned account codes.

- National – Whether account codes are required for long distance calls.
- International – Whether account codes are required for calling international numbers.
- Local – Whether account codes are required for local calls.
- Premium Rate – Whether account codes are required for premium rate (1-900 number) calls.
- Regional – Whether account codes are required for regional calls.

- Mobile (only available in areas which are not part of the North American Numbering Plan (NANP)) – Whether account codes are required for mobile calls.
- Operator – Whether account codes are required for operator calls.
- Directory – Whether account codes are required for directory (411) calls.
- Carrier Dialed – Whether account codes are required to make calls when dialing a carrier code (such as 1010000).
- Local Business Group – Whether account codes are required for local calls to other numbers within your business. Normally calls within your business will be local calls, but if you have multiple sites calls between numbers may be regional or national calls. In this case you need to use the Other Business Group setting.
- Other Business Group – Whether account codes are required for non-local calls to other numbers within your business

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

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

## 8.2.2 Choosing Validated or Non-validated Account Codes

To use Validated Account Codes, follow these steps:

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

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

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

## 8.2.3 Setting Account Code Length

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

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

## 8.2.4 Blocking Access After Incorrect Account Codes

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

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

## 8.2.5 Setting Individual Line Properties

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

- To allow which types of calls require account codes to be changed for each line, check **Call types may be overridden per line**.
- To allow the length of account codes to be changed for each line, check **Account code length may be overridden per line**.
- To allow lines to view the account codes that you have defined for the whole business, check **Lines may view business group account codes**.
- Set whether each line should be able to view, or both view and change, or not view their own account codes by selecting the relevant setting from the dropdown list at the bottom of the Account Code Options section.
- If you want to have per line account codes, but don't want the user to be able to configure these, configure these by logging on to CommPortal as that user. This is described in Section 8.3. Once you have made your changes, click **Apply** to save them.

## 8.2.6 Configuring Account Codes

To modify the account codes, click on **Edit List** at the top of the Accounts code page shown in Figure 29.

The following screen appears.

**Figure 30: Manage Assigned Account Codes dialog box**

Manage Assigned Account Codes

Account code: 4567      Description: Support      Add

You have no account codes assigned.

Clear List    OK    Cancel



1. To add an account code, follow these steps:
  - x** Enter the code in the **Account code** text box.
  - x** Enter the description in the **Description** text box.
  - x** Click on **Add**.
2. To remove an account code, click the delete icon to the right of the account code.
3. To change the description of an account code, remove it and then re-add it with the new description.
4. Once you have finished making changes, click on **OK**.
5. To save your changes you must now click **Apply**.

## 8.3 Viewing and Modifying Account Code Settings for a Line

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

1. Change the settings to allow you to do this as described in Section 8.2.5.
2. Go to the Lines page in CommPortal and log in as the line whose settings you wish to change, as described in Section 3.2.3.
3. Once you have logged in as this user, follow the instructions for modifying account codes in *Norvado SmartLink HPBX End User Guide*. Viewing Business Group Call Reports

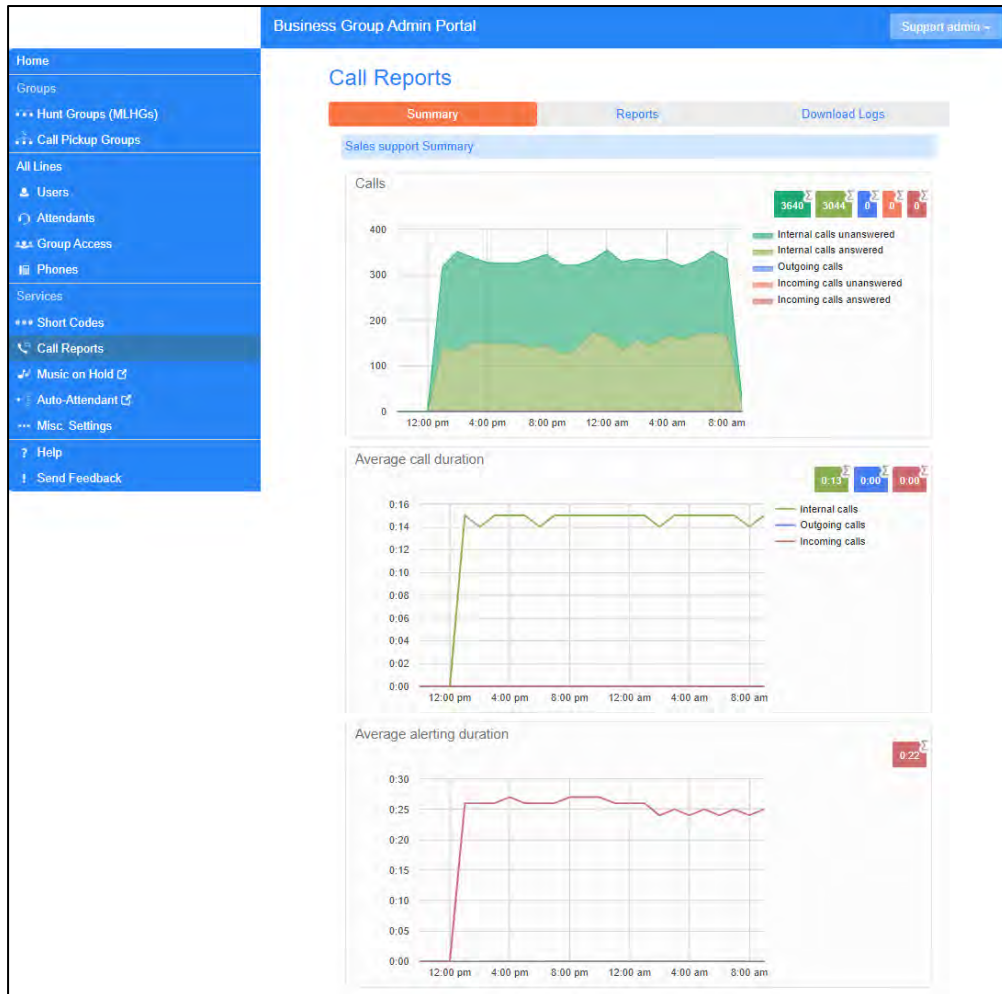
If you have the appropriate permissions, you can see the Call Reports option on the BG Admin Home page and left-hand menu.

- If your permissions allow you to generate reports, you will see both the reports described in 8.4, Call Reports, and the raw call logs described in 8.5, Business Group Call Logs.
- If your permissions only allow you to download call logs, clicking the Call Reports option will only display the raw call logs described in 8.5, Business Group Call Logs.

## 8.4 Call Reports

When you click the Call Reports menu option, you will see a **Summary** screen showing reports on calls, average call duration, and average alerting duration for the Department or Business Group that you administer.

Figure 31: Call Reports Summary page



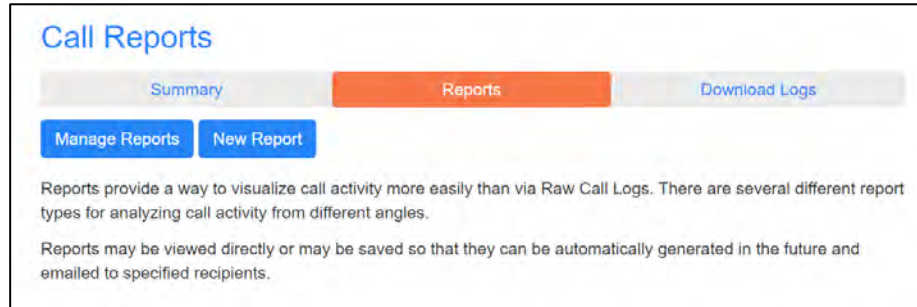
From this page:

- Click the **Reports** tab to create call reports, as described in 8.4.1, Creating Call Reports.
- Click the **Download Logs** tab to download the raw calls logs described in 8.5, Business Group Call Logs.

## 8.4.1 Creating Call Reports

When you click the **Reports** tab, you will see the following screen.

**Figure 32: New Report screen**



On this screen, you can use the **New Report** button to create a report, and, if you have permission to schedule reports as well as create them, use the **Manage Reports** button described in 8.4.2, Manage Scheduled Reports to view existing reports and schedule new ones.

To create a report, click **New Report**.

This launches the following screen, where you can enter the details for your report.

**Figure 33: Creating a report**

- Enter a title for your report in the **Report Title** box.
- If you are also an ACD Supervisor, you will see ACD and BG radio buttons below the **Report Title** box. Select **BG** to generate a Business Group report.
- Use the **Report Type** drop-down to select the type of report – see 8.4.4, Call Report Types for details of the information included in each report.

- Use the **Department** drop-down to select the Department for which you want to generate the report.
- If you want to filter the report to only contain information for a specific line or account code, add the details to the **Line Filter** and **Account Code** boxes.
  - x If you are using a **Line Filter**, enter the full DN of the line.
  - x If you enter both a Department and a Line, and the Line is not in that Department, the report will include calls between that line and anyone in the Department.
  - x If you enter both a Department and an Account Code, the report will include all calls from that Department using that Account Code. For example, if an Account Code relates to a single customer, you can use the Account Code filter to generate a report that will collate all outgoing calls from different lines to that customer.
- Use the **Data range** box on the top right of the screen to set the dates and times that the report should cover.
  - x The **Data range** box will display the dates in the format used for the CommPortal interface. If you want the report to cover less than a whole day, use the dropdowns alongside Start of Day and End of Day to select the required time period.
  - x Click on the icons for the days of the week to include/exclude those days from the report.
- Click **Update Report**

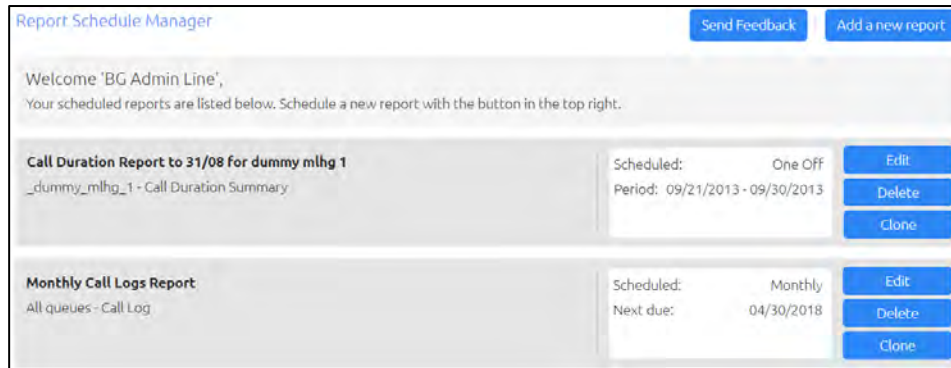
The report is then displayed on screen.

If you also have permission to schedule reports, you will see the following additional options on Figure 33: Creating a report.

- Use the **Schedule** drop-down to select whether the report should be a one-off or a scheduled report.
- Use the **Send to** box to enter the email address(es) of people who should receive a copy of the report when it's generated.

## 8.4.2 Manage Scheduled Reports

If you have permission to schedule reports, you can click the **Manage Reports** button shown in Figure 32: New Report screen to launch the **Report Schedule Manager** screen where you can see details of the reports you have currently scheduled, and create new reports.

**Figure 34: Report Schedule Manager screen**

- Click **Edit** alongside a report if you want to make any changes – this will launch the screen shown in Figure 33: Creating a report, with all the fields for this report filled in with their current values.
- Click **Delete** if you no longer want to schedule this report.
- Click **Clone** to create another report of this type that uses the same parameters as this one. The report will be created with the appropriate fields already filled in.
- From this page, you can also click **Add a new report** to launch the screen shown in Figure 33: Creating a report.
- You can also use the **Send Feedback** button to launch the pop-up described in 2.3.1, Send Feedback.

### 8.4.3 Scheduled Call Report Formats

Scheduled reports are automatically generated in both PDF and CSV format.

- PDF is a better format for human readers. The figures in 8.4.4 show examples of all reports in PDF format.
- However, the CSV file gives additional flexibility for automatic processing including tying reports together, combining report data from different ranges, creating a range of different graphs using a program like Microsoft Excel, extracting additional information from report data using scripts, or using advanced technologies like big data analysis, machine learning, data mining, or profiling.

Figure 35 shows a comparison between the two report formats.

Figure 35: Report format comparison

Call Log							
Date	Direction	Source	Intermediate Destinations	Destination	Alerting Time	Duration	Account Code
10/19/2017 00:00:43	internal	2345557223		2345557224	1:26:57	unconnected	45121515096095
10/19/2017 00:00:57	inbound	2345557212	2345557223, 2345557227	ééééééúúóóááí	1:14:14	1:43:45	73161646119261
10/19/2017 00:00:57	internal	2345557227		2345557224	1:59:33	2:35:35	29961946405839
10/19/2017 00:00:58	internal	2345557213		2345557221	9:05	2:15:30	105226243838450
10/19/2017 00:01:07	inbound	Test "admin"	2345557222	2345557212	26:31	3:10:56	32360179290680

```

Date, Direction, Source, Intermediate Destinations, Alerting Time, Duration, Account Code
10/19/2017 00:00:43, internal, 2345557223, , 2345557224, 1:26:57, unconnected, 45121515096095
10/19/2017 00:00:57, inbound, 2345557212, "2345557223, 2345557227", ééééééúúóóááí, 1:14:14, 1:43:45, 73161646119261
10/19/2017 00:00:57, internal, 2345557227, , 2345557224, 1:59:33, 2:35:35, 29961946405839
10/19/2017 00:00:58, internal, 2345557213, , 2345557221, 9:05, 2:15:30, 105226243838450
10/19/2017 00:01:07, inbound, "Test: ""admin""", 2345557222, 2345557212, 26:31, 3:10:56, 32360179290680
    
```

The CSV files have the same columns and rows as the PDFs, but they do not include any graphs.

- The first line has the column titles separated by commas (,).
- All subsequent lines have the report data, one report row per line.
- Each report data row has column values separated by commas.
- All fields that have commas (,) in their values are surrounded by double quotes (") so that the commas can be distinguished from the field separator.
- All fields that have double quotes (") in their values will be surrounded by double quotes and each double quote character in the value will be represented by two double quote characters ("").
- Reports with no data only contain a single line with the text No Data (or its international equivalent, as in the existing browser and PDF reports).
- "Compound reports" that contain multiple tables have the data from all tables in a single CSV file, which is divided in sections as follows:
  - x Sections are separated by a blank line.
  - x Each section begins with a line that contains the section title and is followed by the section data according to the rules above.
  - x If there is no data in any section, the report contains a single line with the text No Data (or its international equivalent, as in the existing browser and PDF reports).
  - x Otherwise, if one or more sections have no data, those sections contain the section title line followed by No Data.

## 8.4.4 Call Report Types

You can select from the following call reports when using the Report Type dropdown in Figure 33: Creating a report, although note that some are available only if you have the Premium ACD feature.

### Account Statistics

This report shows outbound call statistics for the specified Department, ordered by account codes. You can use this report to identify the usage of the Account Codes configured in your department.

**Figure 36: Account Statistics report**

Account Statistics							
Account Code	Direction	Total calls	Answered calls	Unanswered calls	Average alerting time	Total call duration	Average call duration
0	outbound	240	240 (100%)	0 (0%)	0:04	18:00	0:04
1	outbound	120	120 (100%)	0 (0%)	0:05	6:00	0:03
2	outbound	240	120 (50%)	120 (50%)	0:01	5:00	0:01
3	outbound	60	60 (100%)	0 (0%)	0:10	9:00	0:09
4	outbound	240	240 (100%)	0 (0%)	0:06	11:00	0:02
5	outbound	60	60 (100%)	0 (0%)	0:08	11:00	0:11
6	outbound	360	360 (100%)	0 (0%)	0:02	15:00	0:02
7	outbound	120	120 (100%)	0 (0%)	0:00	6:00	0:03
8	outbound	120	60 (50%)	60 (50%)	0:15	3:00	0:01
9	outbound	180	180 (100%)	0 (0%)	0:00	3:18:00	1:06

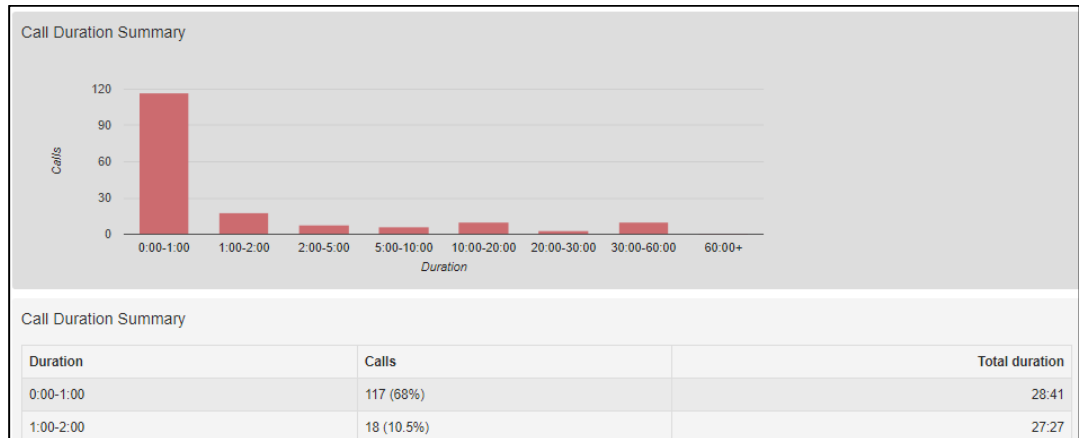
The table provides the following information for each Account Code for the specified period.

- **Account Code** – The Account Code used to make the calls.
- **Direction** – This will always be an outbound call as Account Codes are not used on incoming calls.
- **Total calls** – The total number of calls made using this Account Code.
- **Answered calls** – The total number of calls made using this Account Code that were answered. This is also expressed as a percentage of the total number of calls made during the specified time period.
- **Unanswered calls** – The total number of calls made using this Account Code that were unanswered. This is also expressed as a percentage of the total number of calls made during the specified time period.
- **Average alerting time** – The average time before a call was answered.
- **Total call duration** – The total length of calls made using this Account Code.
- **Average call duration** – The average duration of a call made using this Account Code.

### Call Duration Summary

This report shows the length of incoming and outgoing calls during a specified time period.

**Figure 37: Call Duration Summary report**



The histogram shows how many answered calls fell into each duration range during the specified time period.

The table presents the same information, along with the total duration of all calls in each duration range.

### Call Log

The Call Log report provides a detailed overview of call activity for your Department. If you are looking at this report on the CommPortal BG Admin UI, you can click on DNs and Account Codes to filter the report by that DN or Account Code.

The information is presented as a table with a row for each call.

**Figure 38: Call Log report**

Date	Direction	Source	Intermediate Destinations	Destination	Alerting Time	Duration	Account Code
10/27/2017 09:20:59	outbound	01438200041		01438210000	0:03	unconnected	
10/27/2017 09:23:22	inbound	Number withheld		01438200041	0:01	unconnected	
10/27/2017 09:23:30	inbound	Number withheld		01438200041	0:01	unconnected	

The table provides the following information for each call.

- **Date** – The date and time at which the call was initiated.
- **Direction** – Whether this was an incoming, outgoing or internal call.
- **Source** – The number of the calling party.
- **Intermediate Destinations** – Any numbers that this call was routed to before reaching its destination. This may include an MLHG Pilot Number or the names or numbers of any other Agents that this call was hunted to before it was answered or abandoned.



- **Destination** – The number of the party that received the call.
- **Alerting Time** – How long in seconds before the call was answered.
- **Duration** – The duration of the call.
- **Account code** – The account code used (if applicable).

Note that calls which have used any of the following services may be listed more than once, with each listing representing a leg of the call.

- MADNs
- Call Waiting
- Call Pickup
- Call Hold
- 3-Way Calling
- For some types of call transfer, for example if a call is transferred by a Business Group line into an MLHG, the initial leg of the call will be reported separately.

### Frequent Caller Summary

This report shows the DNs of callers who made the most incoming calls.

Frequent Caller Summary					
Caller ranking	Source	Calls Received	Calls Abandoned	Total queuing time	Total duration
1	2345550018	11	3	2.49	0.36
2	2345550999	4	0	0.25	0.00
3	Alexandre Rondon	1	1	0.10	0.00
4	Filipe Castro	1	1	0.10	0.00

The table presents the following information for the selected time period.

- **Caller ranking** – The ranking for this caller, based on the number of calls received from them during the specified time period.
- **Source** – The number of the calling party.
- **Calls Received** – The number of calls received from this caller over the time period.
- **Calls Abandoned** – The number of calls that were abandoned by this caller before they were answered.
- **Total queuing time** – The total amount of time this caller had to wait before their call was answered by an Agent.
- **Total duration** – The total duration of all incoming calls received from this caller.

### Frequently Called Summary

This report is very similar to the Frequent Caller Summary, but this report is grouped and ranked using the target DN rather than the source DN.

**Figure 39: Frequently Called Summary report**

Frequently Called Summary					
Ranking	Target	Calls Received	Calls Abandoned	Total alerting time	Total duration
1	01438200037	53	5	1:30	3:57:23
2	01438200035	34	5	2:01	2:34:02
3	01438200000	24	2	2:56	3:40

The table presents the following information for the selected time period.

- **Ranking** – The ranking for this caller, based on the number of calls received from them during the specified time period.
- **Target** – The number of the called party.
- **Calls Received** – The number of calls received by this DN over the time period.
- **Calls Abandoned** – The number of calls that were abandoned by the user of this DN without being answered.
- **Total alerting time** – The total amount of time before calls to this DN were answered.
- **Total duration** – The total duration of all incoming calls received by the DN.

### Location Analysis

You will only be able to access the Location Analysis report if this has been explicitly configured by your Service Provider.

This report shows the location of incoming and outgoing calls, based on the DN and location information that has been configured. Your deployment may even have been configured to show these locations on a Google map.

**Figure 40: Location Analysis report**

Location Analysis							
Location	Direction	Total calls	Answered calls	Unanswered calls	Mean alerting time	Total call duration	Mean call duration
Unknown	inbound	323	238 (73.7%)	85 (26.3%)	0:06	11:40:50	2:10
Unknown	outbound	238	172 (72.3%)	66 (27.7%)	0:07	11:29:50	2:53

The table presents the following information for the selected time period.

- **Location** – The location configured for the report. The locations are set up by your Service Provider using map coordinates, which can range from a very small area to a much wider region.
- **Direction** – Whether the row for this location relates to incoming or outgoing calls.

- **Total calls** – The total number of calls received or made in this location during the specified time period.
- **Answered calls** – The number of calls in this location that were answered during the specified time period. This is also shown as a percentage of the total number of calls received.
- **Unanswered calls** – The number of calls in this location that were not answered during the specified time period. This is also shown as a percentage of the total number of calls received.
- **Mean alerting time** – The average time before a call was answered in this location.
- **Total call duration** – The total length of all calls made or received in this location.
- **Mean call duration** – The average duration of an incoming/outgoing call in this location.

### Long Ringing Time

This report contains any incoming calls that rang for longer than a configured threshold. This threshold will have been set by your Service Provider.

**Figure 41: Long Ringing Time report**

Long Ringing Time						
Date	Direction	Source	Intermediate Destinations	Destination	Alerting Time	Duration
10/27/2017 13:11:17	inbound	01438200041		01438200042	1:24	unconnected
10/27/2017 13:13:58	inbound	01438200041		01438200042	0:56	unconnected
10/27/2017 15:37:03	inbound	01438200036	01438200046, 01438200000	01438200000	0:37	0:04
10/27/2017 16:13:42	inbound	01438200036	01438200046, 01438200000	01438200000	0:38	0:06

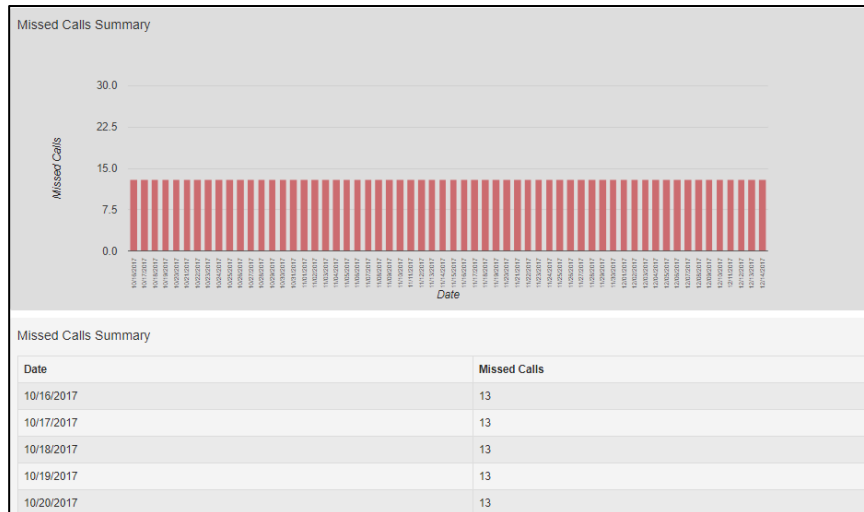
The table presents the following information for the selected time period.

- **Date** – The date and time when the call was received or made.
- **Direction** – Whether this was an incoming or outgoing call.
- **Source** – The DN of the call.
- **Intermediate Destinations** – Any numbers that this call was routed to before reaching its destination.
- **Destination** – The number of the party that received the call.
- **Alerting Time** – How long in seconds before the call was answered.
- **Duration** – The duration of the call, or Unconnected if the caller rang off before the call was answered.

### Missed Calls Summary

This report shows a high-level summary of incoming calls that were not connected. Note that any calls answered by an automaton, for example voicemail or an auto attendant, count as being connected.

**Figure 42: Missed Call Summary report**



This report shows a histogram and a table, both showing the Date and the total number of missed calls on that date.

**Missed Calls Detail**

This report shows details of incoming calls that were not connected.

**Figure 43: Missed Calls Detail**

Date	Direction	Source	Intermediate Destinations	Destination	Alerting Time	Duration
10/27/2017 09:23:22	inbound	<a href="#">Number withheld</a>		<a href="#">01438200041</a>	0:01	unconnected
10/27/2017 09:23:30	inbound	<a href="#">Number withheld</a>		<a href="#">01438200041</a>	0:01	unconnected
10/27/2017 10:41:26	inbound	<a href="#">01438200047</a>		<a href="#">01438200037</a>	0:01	unconnected

The table presents the following information for the selected time period.

- **Date** – The date and time when the call was received or made.
- **Direction** – Whether this was an incoming or outgoing call.
- **Source** – The DN of the call, if available. Click on the link to filter the report to see all missed calls from this DN.
- **Intermediate Destinations** – Any numbers that this call was routed to before reaching its destination.
- **Destination** – The number of the party that received the call.
- **Alerting Time** – How long in seconds before the call was answered.
- **Duration** – The duration of the call, or Unconnected if the caller rang off before the call was answered.

## Short Calls

This report shows calls that were answered that were shorter than a threshold configured by your Service Provider. This report may indicate when a caller was connected to an auto attendant or voicemail service, but hung up without taking further action.

**Figure 44: Short Calls report**

Short Calls						
Date	Direction	Source	Intermediate Destinations	Destination	Alerting Time	Duration
10/27/2017 10:26:47	inbound	<a href="#">01438200034</a>		<a href="#">01438200030</a>	0:03	0:03
10/27/2017 10:55:09	inbound	<a href="#">01438200047</a>		<a href="#">01438200037</a>	0:00	0:04
10/27/2017 11:48:09	inbound	<a href="#">01438200035</a>		<a href="#">01438200037</a>	0:00	0:03

The table presents the following information for the selected time period.

- **Date** – The date and time when the call was received or made.
- **Direction** – Whether this was an incoming or outgoing call.
- **Source** – The DN of the call, if available. Click on the link to filter the report to see all short calls from this DN.
- **Intermediate Destinations** – Any numbers that this call was routed to before reaching its destination.
- **Destination** – The number of the party that received the call.
- **Alerting Time** – How long in seconds before the call was answered.
- **Duration** – The duration of the call.

## Top Talkers

This report shows call data for BG lines, including total and answered calls and data on call duration, ordered by total call duration.

**Figure 45: Top Talkers report**

Top Talkers								
Rank	Line	Total calls	Placed calls	Answered calls	Min call duration	Mean call duration	Max call duration	Total call duration
1	<a href="#">01438200037</a>	101	20 (19.8%)	73 (72.3%)	0:00	3:44	36:55	6:17:04
2	<a href="#">01438200035</a>	108	39 (36.1%)	59 (54.6%)	0:00	3:16	43:58	5:53:59
3	<a href="#">01438200046</a>	114	74 (64.9%)	40 (35.1%)	0:00	2:48	43:58	5:20:38

The table presents the following information for the selected time period.

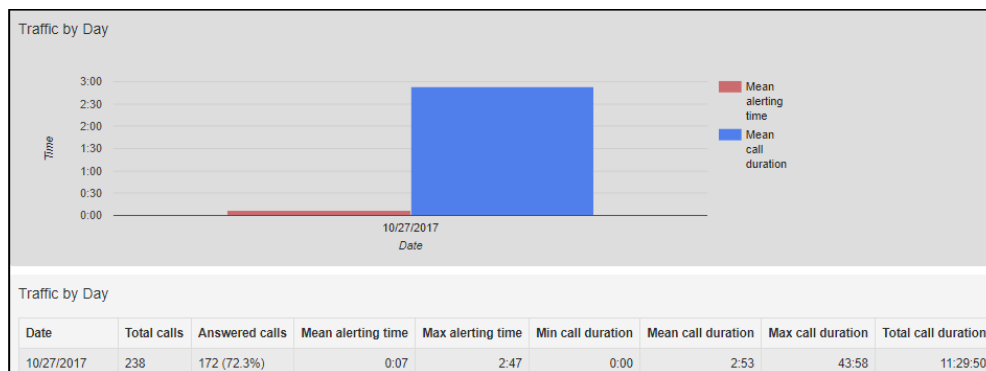
- **Rank** – The ranking for this DN, based on the total call duration of calls to this number during the specified time period.

- **Line** – The DN of the line.
- **Total Calls** – The total number of calls received by the DN.
- **Placed Calls** – The total number of calls placed by the DN. This is also shown as a percentage of the number of calls placed by all the lines.
- **Answered Calls** – The total number of calls answered by the DN. This is also shown as a percentage of the number of calls answered by all the lines.
- **Min call duration** – The shortest call received or made by this DN.
- **Mean call duration** – The average length call received or made by this DN.
- **Max call duration** – The longest call received or made by this DN.
- **Total call duration** – The total time that this DN was in a call over the specified time period.

### Traffic by Day

This report presents call data arranged by day.

**Figure 46: Traffic by Day**



The bar chart displays the mean alerting time and mean call duration for each day, and the table provides the following information for each day specified in the report.

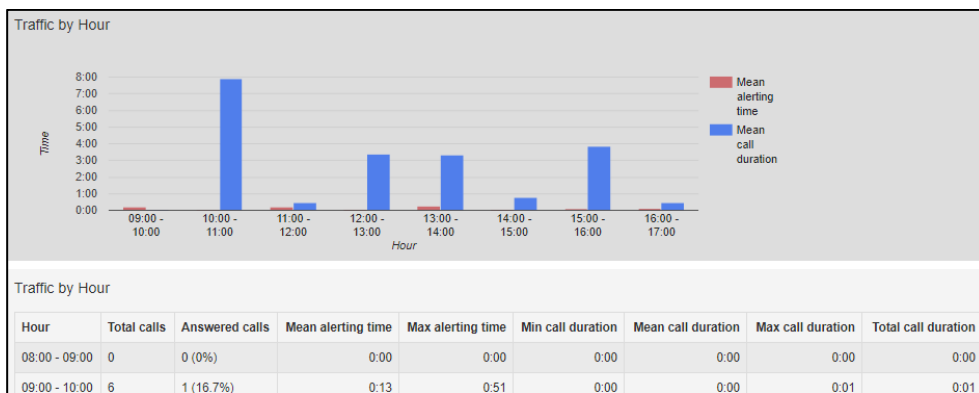
- **Date** – The day that this row covers.
- **Total calls** – The total number of calls received on that date by the department, line or account code, depending on how the report was filtered.
- **Answered calls** – The total number of calls answered on this day.
- **Mean alerting time** – The average time before calls were answered on this day.

- **Max alerting time** – The maximum time that a call rang before it was answered on this day.
- **Min call duration** – The shortest call received or made on this day.
- **Mean call duration** – The average length call received or made on this day.
- **Max call duration** – The longest call received or made on this day.
- **Total call duration** – The total time spent in calls on this day.

### Traffic by Hour

This report presents call data arranged by day.

**Figure 47: Traffic by Hour**



The bar chart displays the mean alerting time and mean call duration for each hour, and the table provides the following information for each day specified in the report.

- **Hour** – The hour that this row covers.
- **Total calls** – The total number of calls received during that hour by the department, line or account code, depending on how the report was filtered.
- **Answered calls** – The total number of calls answered during that hour.
- **Mean alerting time** – The average time before calls were answered during that hour.
- **Max alerting time** – The maximum time that a call rang before it was answered during that hour.
- **Min call duration** – The shortest call received or made during that hour.
- **Mean call duration** – The average length call received or made during that hour.

- **Max call duration** – The longest call received or made during that hour.
- **Total call duration** – The total time spent in calls during that hour.

### Unreturned Calls Detail

This report is the same as the Missed Calls Detail report but omits any calls that were subsequently connected during the period of the report.

**Figure 48: Unreturned Calls Detail**

Unreturned Calls Detail						
Date	Direction	Source	Intermediate Destinations	Destination	Alerting Time	Duration
10/27/2017 09:23:22	inbound	<a href="#">Number withheld</a>		<a href="#">01438200041</a>	0:01	unconnected
10/27/2017 09:23:30	inbound	<a href="#">Number withheld</a>		<a href="#">01438200041</a>	0:01	unconnected

The table provides the following information.

- **Date** – The date and time when the call was received or made.
- **Direction** – Whether this was an incoming or outgoing call.
- **Source** – The DN of the call, if available. Click on the link to filter the report to see all missed calls from this DN.
- **Intermediate Destinations** – Any numbers that this call was routed to before reaching its destination.
- **Destination** – The number of the party that received the call.
- **Alerting Time** – How long in seconds before the call was answered.
- **Duration** – The duration of the call, or Unconnected if the caller rang off before the call was answered.

### User Statistics

This report provides an overview of a range of lines, allowing you to compare the activity of different lines within your Business Group or Department over a specific time period.

**Figure 49: User Statistics report**

User Statistics							
Line	Direction	Total calls	Answered calls	Unanswered calls	Mean alerting time	Total call duration	Mean call duration
<a href="#">*98</a>	inbound	6	0 (0%)	6 (100%)	0:06	0:00	0:00
<a href="#">*98</a>	outbound	0	0 (0%)	0 (0%)	0:00	0:00	0:00
<a href="#">01438200000</a>	inbound	47	44 (93.6%)	3 (6.4%)	0:07	7:20	0:09
<a href="#">01438200000</a>	outbound	0	0 (0%)	0 (0%)	0:00	0:00	0:00



The table provides the following information.

- **Line** – The Business Group/Department line.
- **Direction** – Whether this was an incoming, outgoing or internal call.
- **Total calls** – The number of incoming/outgoing calls involving this line.
- **Answered calls** – The number of incoming/outgoing calls involving this line that were answered by the called party. This is also shown as a percentage of the total outgoing calls made.
- **Unanswered calls** – The number of incoming/outgoing calls involving this line that were not answered by the called party. This is also shown as a percentage of the total outgoing calls made.
- **Mean alerting time** – The average time before a call was answered.
- **Total call duration** – The total duration of all incoming/outgoing calls involving this line.
- **Mean call duration** – The average duration of an incoming/outgoing call involving this line.

## 8.5 Business Group Call Logs

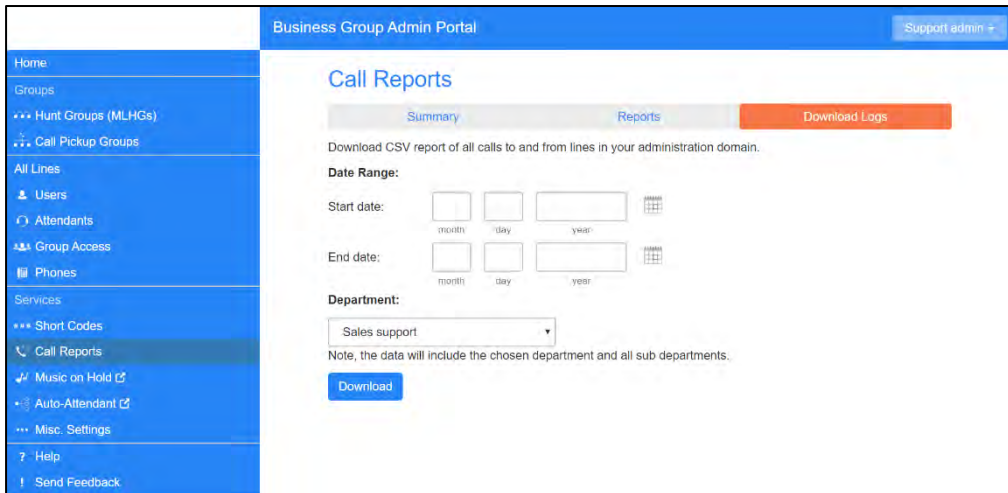
Depending on your permissions, you may be able to export raw call logs in CSV format containing details of all calls made (up to a month at a time) to and from the lines within your administrative domain. This includes calls to MLHGs within the Business Group or department. The reports can be filtered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

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

To download call logs:

- From the BG Admin page select the *Call Reports* link from the left of the page.
  - **x** If you only have permission to access raw call logs, you will see the following screen.
  - **x** If you also have permission to view Call Reports, use the **Download Logs** tab shown on Figure 31: Call Reports Summary page to access the Call Logs panel.

Figure 50: CommPortal Business Group Admin Call Logs display



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

## 9 Viewing Miscellaneous Settings

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

**Figure 51: CommPortal Business Group Admin Number Misc. Settings display**

Telephone Number Block	Number of Lines Allocated
(704) 555 0101 - (704) 555 0105	3
(704) 555 0113 - (704) 555 0119	1
(704) 555 0120 - (704) 555 0145	5

It includes the following tabs.

- Number Blocks, described in section 9.1.
- External Calls, described in section 9.2.
- Call Notifications, described in section 9.3.
- Managing Emergency Location data, described in section **Error! Reference source not found.**
- Other Settings, described in section 9.4.

### 9.1 Viewing Number Block Settings

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

### 9.2 Viewing External Call Settings

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

- External Calls – This can take one of the following values:
  - x Not Permitted – Calls outside of your business are not permitted.
  - x Unlimited – There is no explicit limit to the number of concurrent external calls you can have, but there may be a limit to either the number of Incoming or Outgoing Calls you can make.

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

## 9.3 Configuring Call Notifications

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

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

Figure 52: Call Notifications tab

**Misc. Settings**

Number Blocks External Calls Trunk Calls **Call Notifications** Other Settings

Select contacts to receive notifications when emergency calls are dialed within their department. Nested departments will contact both the emergency contacts of their own department and those of its parent's.

Disable Emergency Call Notifications Add New

Department	Emergency Contacts
Alpha	Joan Clarke
MetaSwitch	Jane Taylor
	Janet Brown

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

Both these actions launch the Emergency Callers pop-up.

Figure 53: Emergency Callers pop-up

**Emergency Callers**

Add details for the people to be notified when emergency calls are made from the chosen department.

Department: Select department

Email Outdial

Name	Email Address
<input type="text"/>	<input type="text"/>

Save Cancel

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

- Click **Save**.

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

## 9.4 Viewing Other Settings

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

**Misc. Settings**

Number Blocks External Calls Trunk Calls Call Notifications **Other Settings**

Apply Cancel

**Restricted Subscriber Messaging**

Prevent the forwarding of voicemail messages to subscribers outside of the Business Group.

**Internal Operator Number**

Business Group operator number:

Allow subscribers in the Business Group to set their own operator number.

**Use Internal Extensions**

Display internal Business Group extensions rather than external directory numbers where possible.

- **Restricted Subscriber Messaging** – This determines whether members of this Business Group can send messages only to other members of the same Business Group.
- **Internal operator number** – This determines the number used to access this Business Group's operator and allows you to specify whether you want to allow individual subscribers to set their own call transfer number that is used when a caller reaches a subscriber's mailbox and wants to try the subscriber on another number rather than leave a voicemail. You may want to force these calls to go to an operator, for example your business's receptionist, or let your subscribers optionally set this to a number that they own, for example their mobile number.
- **Use Internal extensions** – This determines whether or not CommPortal displays the Business Group extension number associated with a directory number where possible.

## 10 Auto-Attendant – Easy Attendant / Premium Attendant

### 10.1 Overview

MetaSphere EAS provides two solutions for Auto Attendant functionality.

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

Both Easy and Premium Attendant can also be configured to allow callers to dial an extension at any point in the menu and not just on a Dial by Extension menu option. If you want to use this option, you must enable it as described in 10.2.4 and you should also ensure that your initial greeting mentions the option that a caller who knows the extension they require can dial it immediately.

## 10.2 Easy Attendant

This section outlines the required steps for configuring Easy Attendant.

### 10.2.1 Planning your Easy Attendant

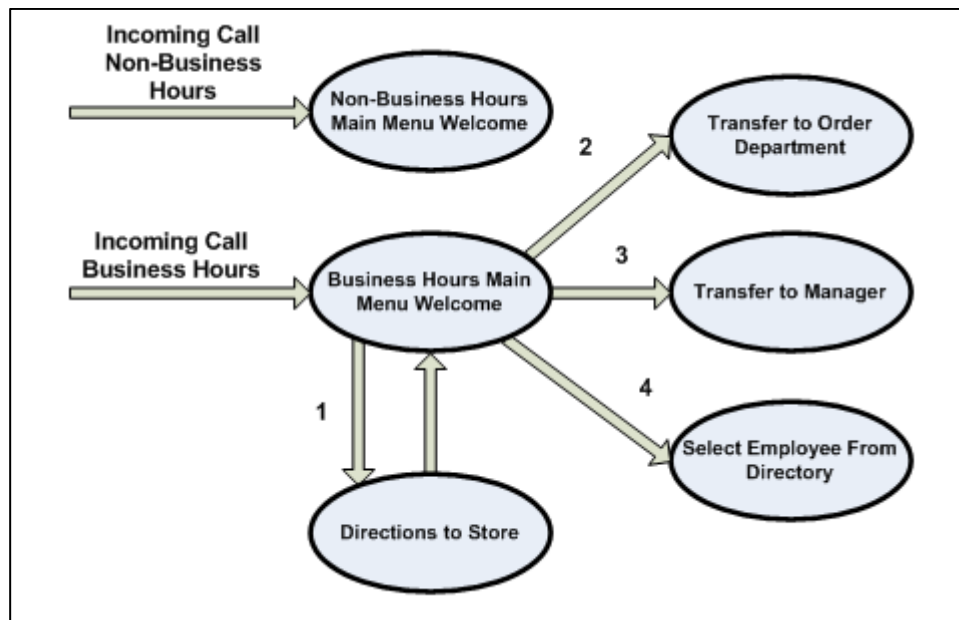
Before you start to set up your Easy Attendant, it is a good idea to sketch out the operation of each menu on paper. This allows you to plan what options you need from the menu and how each one will operate.

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

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

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

**Figure 54: Easy Attendant call handling example**



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

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

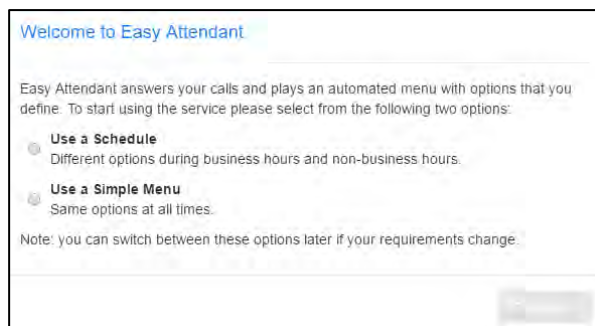


## 10.2.2 Logging on to Easy Attendant

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

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

**Figure 55: Easy Attendant Welcome screen**



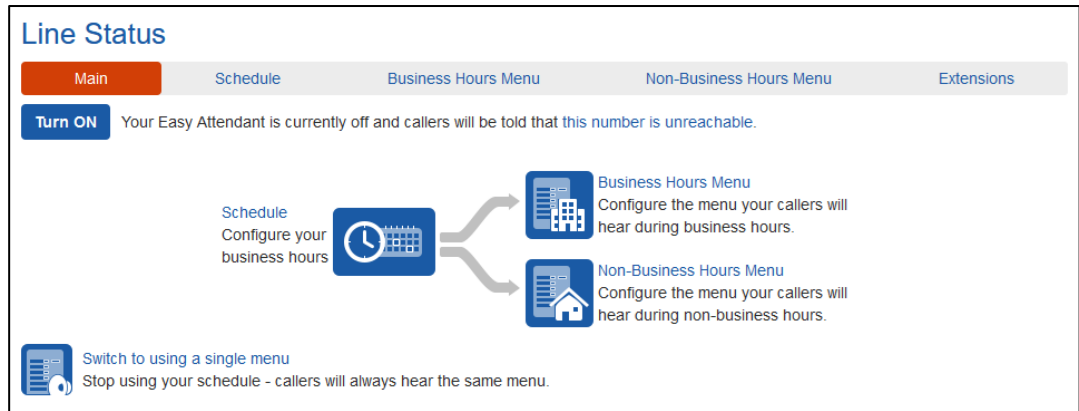
- Use the radio buttons to select either a scheduled menu for business hours and non-business hours or a simple menu that will be played whenever Easy Attendant is turned on, and press **Continue**. (You can change this later if you need to.)
- The screen then displays the Easy Attendant portal.
- This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

---

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

---

**Figure 56: Easy Attendant Portal**

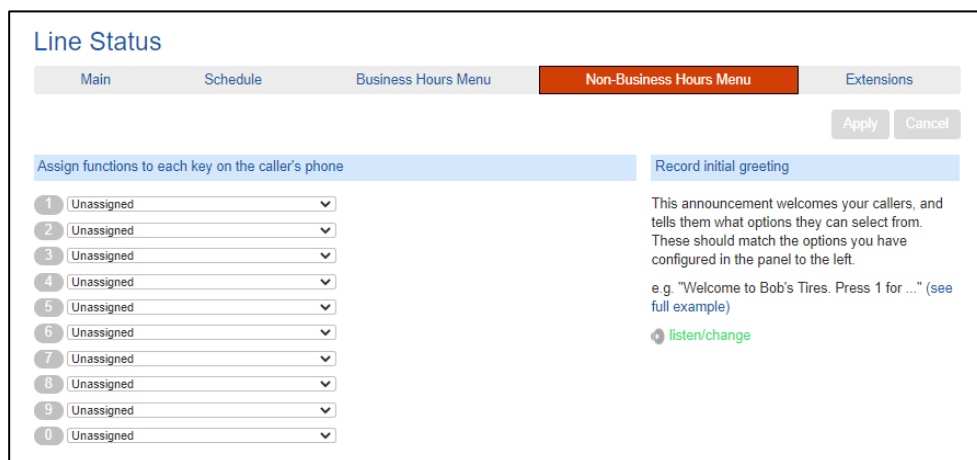


### 10.2.3 Configuring Easy Attendant Menus and Schedules

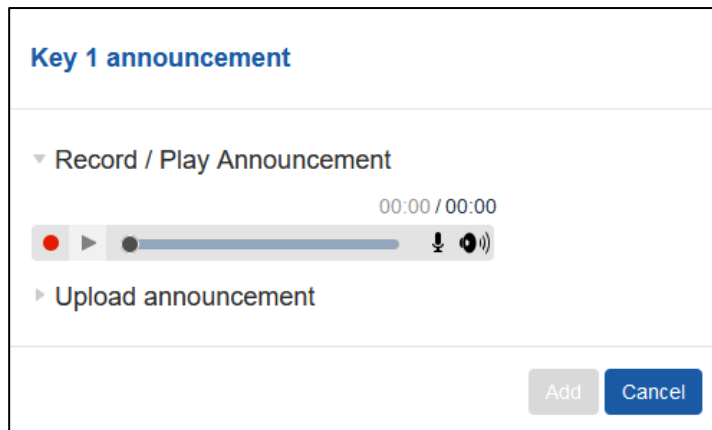
You should now begin configuring your Easy Attendant menu(s) and schedules.

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

**Figure 57: Recording an initial greeting**

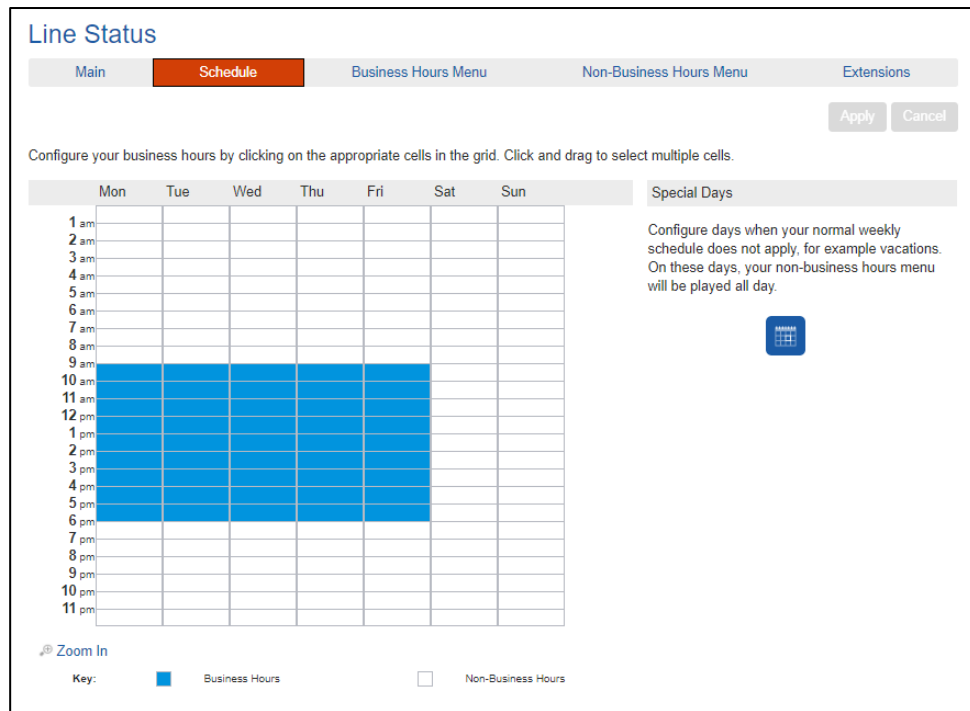


- Select the *record* option on the lower right of the screen. This launches the announcement recorder, where you can either record an announcement, or upload a pre-recorded announcement.

**Figure 58: Announcement recorder**

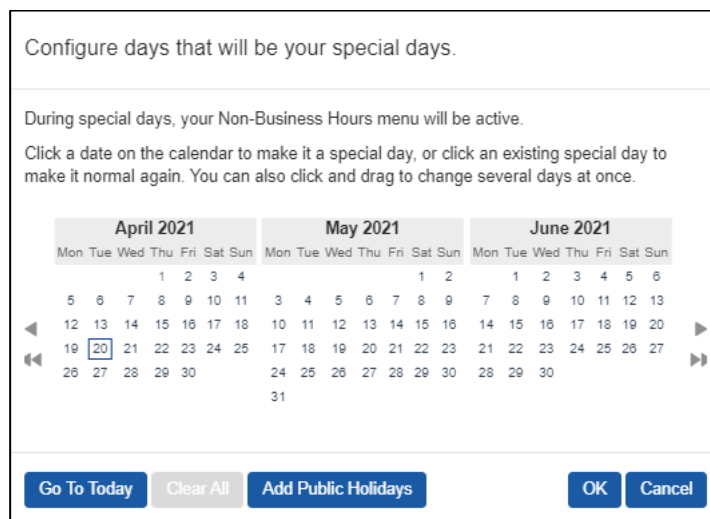
- Once you have recorded or uploaded your initial greeting, you can return to the Menu tab.
- Now you are ready to define the specific menu items as defined in your plan to one of the following options.
  - x Play Announcement
  - x Transfer to Phone
  - x Transfer to VoicemailDial by Extension
  - x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

**Figure 59: Easy Attendant Schedule tab**



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

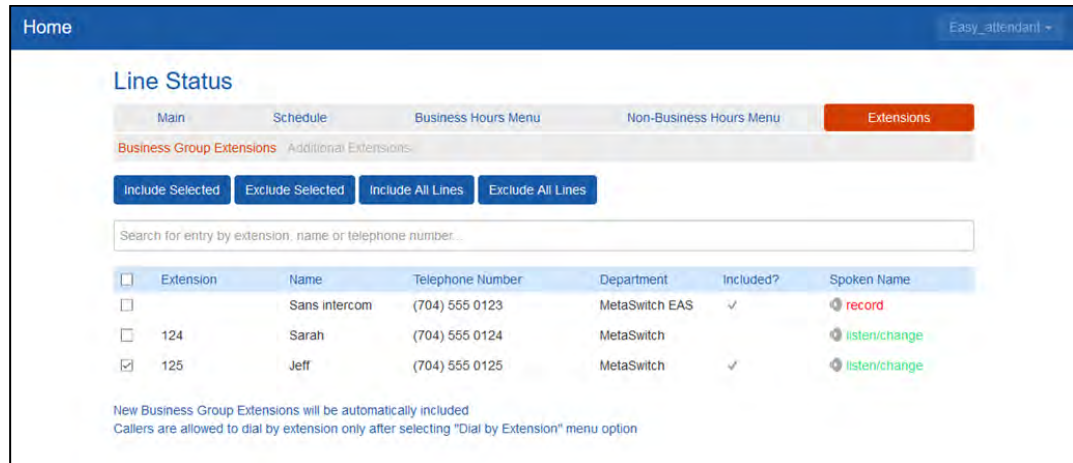
**Figure 60: Special Days**



## 10.2.4 Configuring your Easy Attendant Extensions

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

Figure 61: Easy Attendant Extensions tab



Home Easy\_attendant ▾

Line Status

Main Schedule Business Hours Menu Non-Business Hours Menu **Extensions**

Business Group Extensions Additional Extensions...

Include Selected Exclude Selected Include All Lines Exclude All Lines

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

<input type="checkbox"/>	Extension	Name	Telephone Number	Department	Included?	Spoken Name
<input type="checkbox"/>		Sans intercom	(704) 555 0123	MetaSwitch EAS	✓	record
<input type="checkbox"/>	124	Sarah	(704) 555 0124	MetaSwitch		listen/change
<input checked="" type="checkbox"/>	125	Jeff	(704) 555 0125	MetaSwitch	✓	listen/change

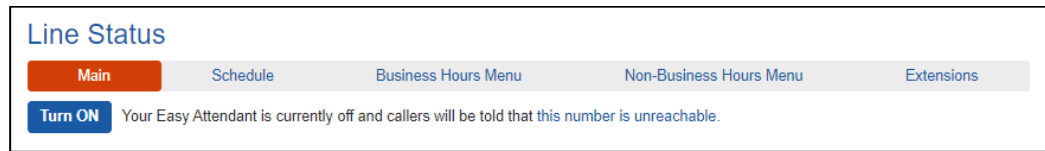
New Business Group Extensions will be automatically included  
Callers are allowed to dial by extension only after selecting "Dial by Extension" menu option

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

## 10.2.5 Activating Easy Attendant

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

Figure 62: Turn Easy Attendant On button



## 10.3 Premium Attendant

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

### 10.3.1 Planning your Premium Attendant

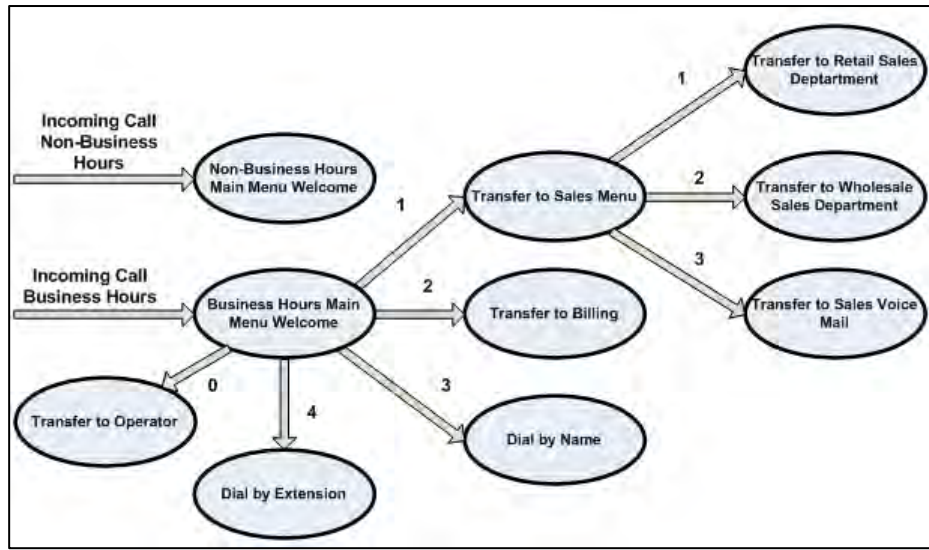
Before you start to set up your Premium Attendant, it is a good idea to sketch out the operation of each menu on paper. This allows you to plan what options you need from the menu and how each one will operate.

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

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

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

Figure 63: Premium Attendant call handling example



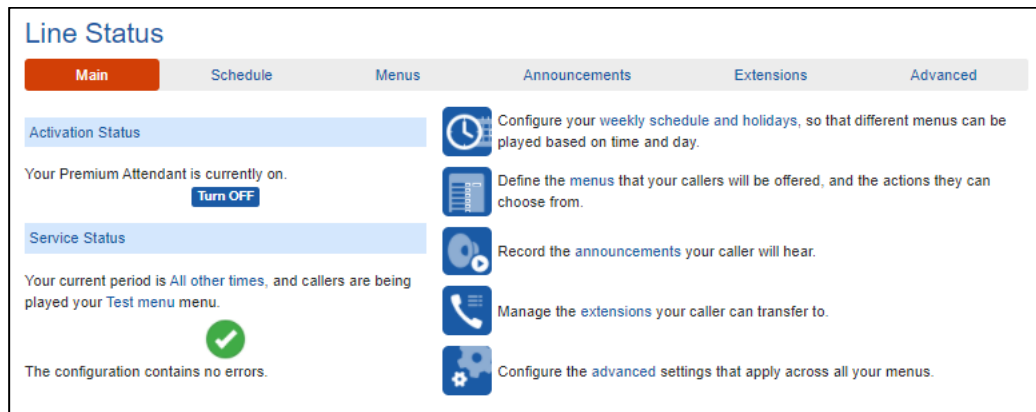
For out-of-hours and holiday operation, Premium Attendant may provide an announcement, for example saying that the business is closed, (without allowing the caller to select any options), or it may provide an alternative set of menu options.

### 10.3.2 Logging into Premium Attendant

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

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

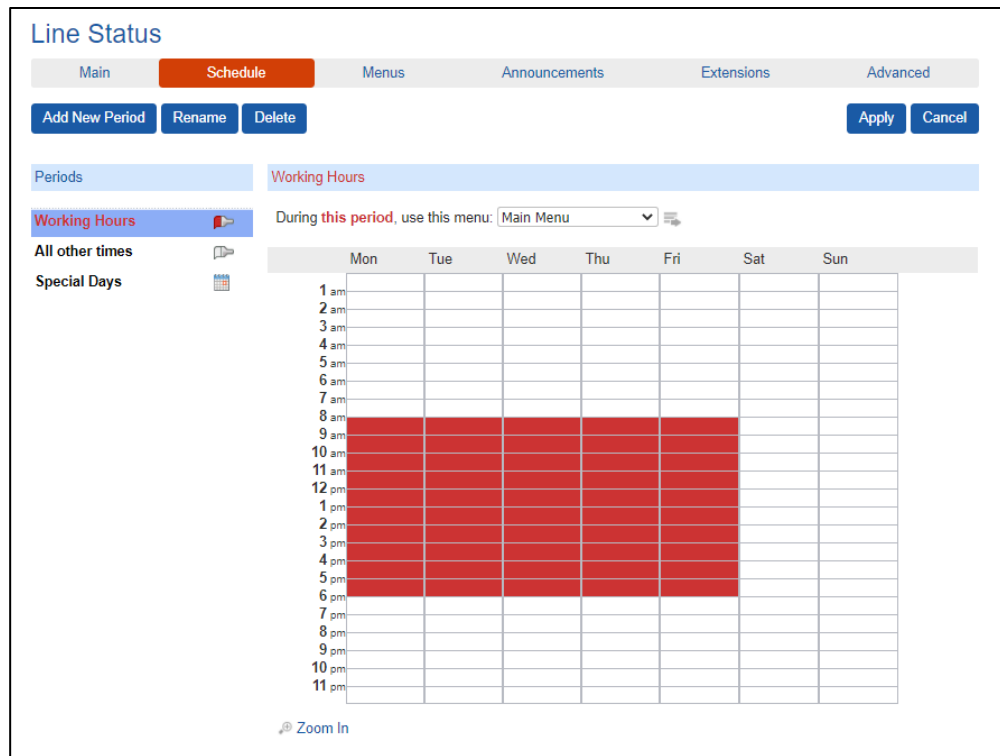
Figure 64: Premium Attendant Portal



### 10.3.3 Configuring Premium Attendant Schedule

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

**Figure 65: Premium Attendant Schedule tab**



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



Figure 66: Premium Attendant Special Days

### Line Status

Main
Schedule
Menus
Announcements
Extensions
Advanced

Add New Period
Rename
Delete
Apply
Cancel

Periods

Special Days

**Working Hours**

**All other times**

**Special Days**

During **this period**, use this menu: Holiday Menu

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

April 2021							May 2021						
Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun
			1	2	3	4					1	2	
5	6	7	8	9	10	11	3	4	5	6	7	8	9
12	13	14	15	16	17	18	10	11	12	13	14	15	16
19	20	21	22	23	24	25	17	18	19	20	21	22	23
26	27	28	29	30			24	25	26	27	28	29	30
							31						

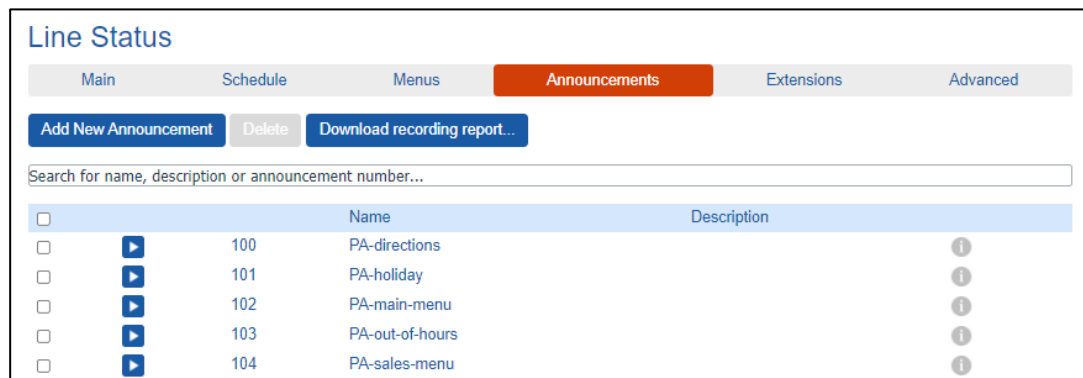
◀
◀◀
▶▶
▶

Go To Today
Clear All
Add Public Holidays

## 10.3.4 Configuring Premium Attendant Announcements

In order to use your Premium Attendant you will need to record or upload the announcements that will be played as either your primary Business Hours or Non-Business Hours greeting as well as any other recorded announcements required. The example in section 10.3.1 would require three announcements, one each for Business Hours, Non-Business hours and the Sales menu. Click in the Announcements tab to begin configuration.

**Figure 67: Premium Attendant Announcements tab**



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

**Figure 68: Add Announcement**

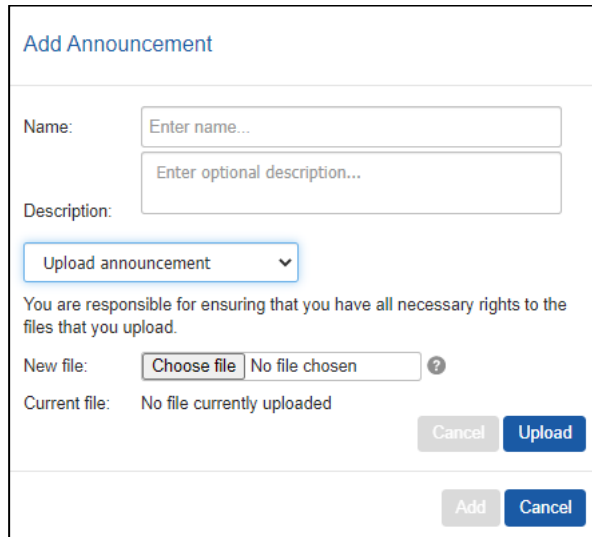
The screenshot shows the 'Add Announcement' form. It includes a 'Name' field with a placeholder 'Enter name...' and a 'Description' field with a placeholder 'Enter optional description...'. Below the description field is a dropdown menu labeled 'Record / Play Announcement' with a downward arrow. Below the dropdown is a progress bar with a red record button, a play button, and a volume icon. The progress bar shows '00:00 / 00:00'. At the bottom right of the form are 'Add' and 'Cancel' buttons.

1. Enter the name and description of your announcement.
2. To record your announcement using a microphone or headset connected to your computer, click the red record button.

3. When you have finished recording, press the stop button and click on the **Add** button at the bottom of the interface.

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

**Figure 69: Uploading an Announcement**



The screenshot shows a web form titled "Add Announcement". It contains the following elements:

- Name:** A text input field with the placeholder "Enter name...".
- Description:** A text input field with the placeholder "Enter optional description...".
- Dropdown menu:** A menu with the selected option "Upload announcement".
- Disclaimer:** A line of text stating "You are responsible for ensuring that you have all necessary rights to the files that you upload."
- New file:** A file selection interface with a "Choose file" button, a text field showing "No file chosen", and a help icon.
- Current file:** A text field showing "No file currently uploaded".
- Buttons:** A "Cancel" button and an "Upload" button are located below the file selection area. At the bottom of the form, there is an "Add" button and a "Cancel" button.

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

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

**Figure 70: Recording Announcements by Phone**

### 10.3.5 Configuring Premium Attendant Menus

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

**Figure 71: Premium Attendant Menus tab**

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

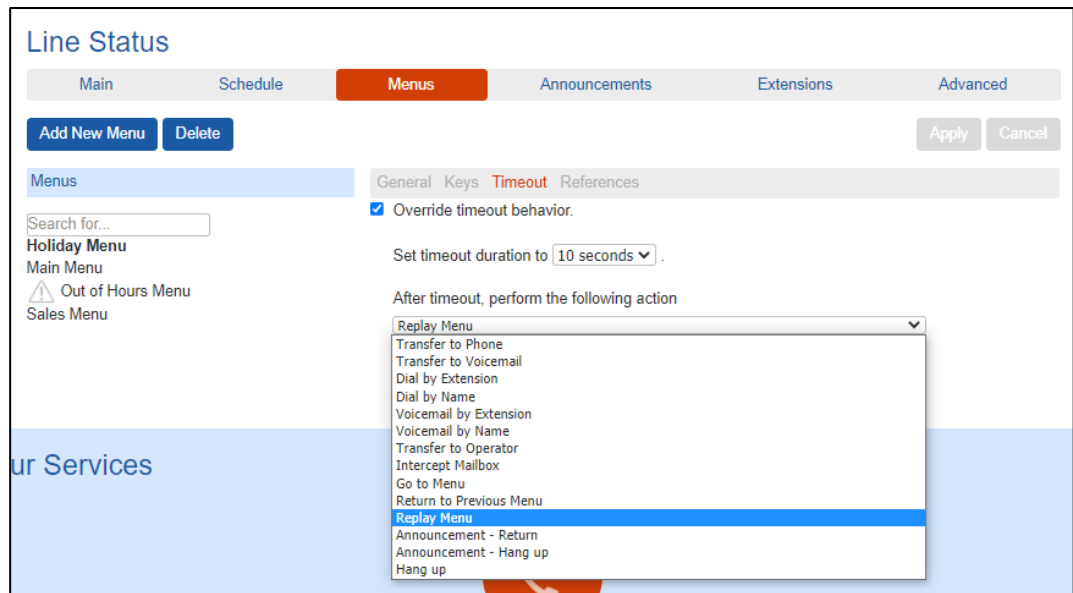
Figure 72: Premium Attendant key configuration menu

The options available for each key are as follows:

- Use Default (This option is default for all keys for new menus)
- Transfer to Phone
- Transfer to Voicemail (CoS controlled)
- Dial by Extension (CoS controlled including whether an announcement is automatically played giving initial instructions when this key is pressed, or whether these instructions must be recorded by the subscriber in the menu announcement)
- Self-care by Extension (CoS controlled, allows subscribers with mailboxes only identified by extension numbers to dial in to their mailbox)
- Dial by Name (CoS controlled)
- Voicemail by Extension (CoS controlled)
- Voicemail by Name (CoS controlled)
- Transfer to Operator (CoS controlled, and only available for Premium Attendants in a Business Group)
- Intercept mailbox (CoS controlled)
- Go to Menu
- Return to Previous Menu
- Replay Menu
- Announcement – Return
- Announcement – Hang up
- Hang up

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

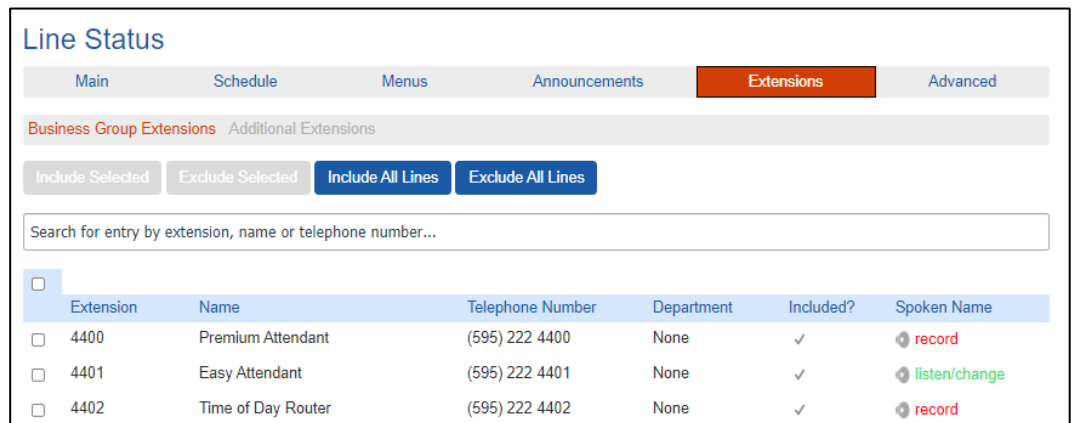
**Figure 73: Premium Attendant timeout configuration menu**



### 10.3.6 Configuring Premium Attendant Extensions

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

**Figure 74: Premium Attendant Extensions tab**



The procedure for configuring your Premium Attendant extensions is the same as for Easy Attendant, as described in 10.2.4.

### 10.3.7 Configuring Premium Attendant Advanced Options

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

**Figure 75: Premium Attendant Advanced Settings tab**

**Line Status**

Main Schedule Menus Announcements Extensions **Advanced**

Default keys Error handling Other settings

Apply Cancel

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

1	Do Nothing	
2	Transfer to Phone	e.g. (123) 456 7890
3	Transfer to Voicemail	e.g. (123) 456 7890
4	Do Nothing	
5	Do Nothing	
6	Do Nothing	
7	Dial by Extension	?
8	Do Nothing	
9	Return to Previous Menu	
0	Do Nothing	
#	Replay Menu	
*	Return to Previous Menu	

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

**Figure 76: Premium Attendant Error Handling menu**

**Line Status**

Main Schedule Menus Announcements Extensions **Advanced**

Default keys **Error handling** Other settings

Apply Cancel

**Timeout**

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

After 3 menu timeouts :  
Replay Menu

**Call Transfer**

Ring: for 125 seconds

If a call transfer fails: Return to the menu

After 3 call transfer failures :  
Hang up

**Unknown Input**

If the caller selects an unassigned key 3 times :  
System announcement then hang up

**Invalid Extension**

If the caller dials an invalid extension 3 times :  
Replay Menu

### 10.3.8 Activating Premium Attendant

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

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

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

x  error icon

x  warning icon

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



## 11 Music On Hold

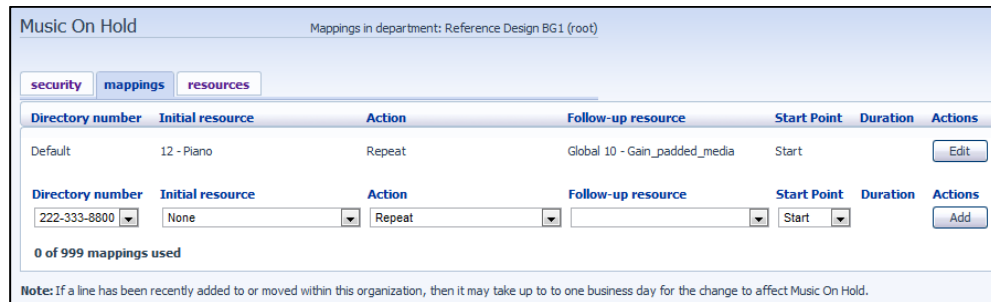
If your system uses Music On Hold, you will be able to access your Music On Hold administration system from the CommPortal BG Admin interface.

### 11.1 CommPortal Access

#### 11.1.1 Logging In

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

**Figure 77: Music On Hold administration system**



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

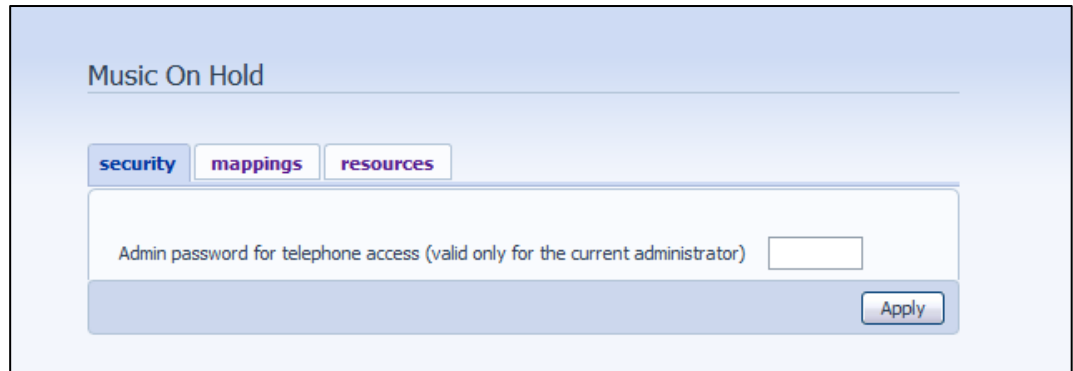
- Security – View and configure your security settings.
- Mappings – This section allows you to configure different recordings to be played when different lines within your business put callers on hold.
- Resources – This section allows you to upload and manage your recordings.

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

#### 11.1.2 Viewing and Changing Your Security Settings

To view your security settings, select the Security section.

**Figure 78: Music On Hold Security section**



The screenshot shows a web interface titled "Music On Hold". Below the title are three tabs: "security", "mappings", and "resources". The "security" tab is selected. Below the tabs is a text input field with the placeholder text "Admin password for telephone access (valid only for the current administrator)". To the right of the input field is an "Apply" button.

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

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

### 11.1.3 Managing Recordings

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

Figure 79: Music On Hold Resources section



Music On Hold

security mappings resources

Global Media List

ID	Description	Length
10	Gain_padded_media	303 seconds

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

ID Description Upload local resource file Actions

Choose File No file chosen Add

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

### Global Media List

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

### Your Own Recordings

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

### Recording Limits

At the bottom of this section you will see:

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

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

### Recording Formats

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

### Adding a Recording

To add your own recording, follow these steps:

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

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

### Modifying a Recording

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

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

To change the volume at which a recording will play, follow these steps:

1. Click on the **Edit** button to the right of the recording.
2. Select a new **Gain** value from the drop-down list.
  - a. Select 0 to play the recording at its original volume,
  - b. Select +1, +2 or +3 to play the recording louder, with +3 being the loudest.
  - c. Select -1, -2 or -3 to play the recording quieter, with -3 being the quietest.
3. Click **Save**.

### Playing a recording

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

If you want to check the effect of changing the volume of a recording you should log into the phone interface and play the recording from there. For more details on this, see Section 11.2.1.

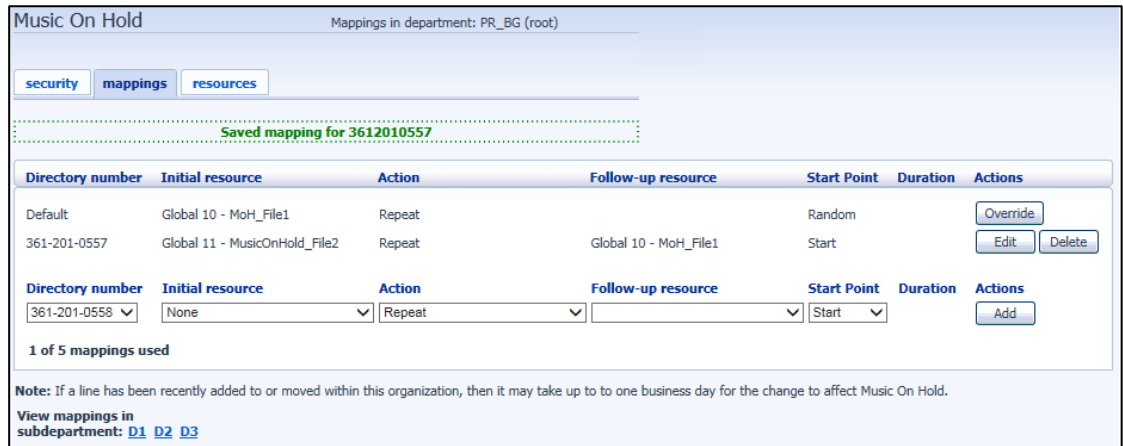
### Removing a recording

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

## 11.1.4 Assigning Recordings to Lines

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

**Figure 80: Music On Hold Mappings section**



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

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

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

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

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

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

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

- If you are an administrator for the whole Business Group, you can override this mapping for the whole group and all its departments, to use a different resource or a combination of resources.
- If you are an administrator for a department within the group, you can override the default mapping for your department and any sub-departments.
- If you have not changed the default, it appears with an **Override** button to the right (instead of the **Edit** button shown for other mappings).

### Adding a Mapping

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

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

### Modifying a Mapping

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

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

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

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

2. Modify the fields.

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

3. Click on **Save**.

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

### Removing a Mapping

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

## 11.2 Phone Access

Using this interface, you can:

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

### 11.2.1 Logging In

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

1. Your telephone number.

2. Your Music On Hold password. You can view or change this by using CommPortal as described in Section 11.1.2.

## 11.2.2 Using the Telephone Interface

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

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

Press \* at any time to go back to the previous menu.

1. Listen to resource for default mapping. This will play you the recording which is played to callers on hold for extensions which do not have their own mappings.
  - x If you have logged in using an administrator line assigned to the top-level Business Group, you will hear the default mapping for the Business Group. If you have logged in as a department administrator, you will hear the default mapping for your department
2. Listen to resource for particular extension. This will play the recording which is played to callers on hold on a particular extension.
  - x If you type a valid extension number, you will hear the resources that are mapped to this line, or the resources for the default mapping that it uses if it does not have its own explicit mapping. You will hear these resources in the same pattern as a caller would hear them.
3. Listen to global resources. This allows you to listen to the recordings in the Global Media List, described in Section 11.1.3. You will need the 2-digit resource ID of the recording you want to listen to.
4. Manage existing local resources. This allows you to modify or delete recordings you have added to the Music On Hold system, including recording a new resource to replace an existing one. You will need the 2-digit resource ID of the recording you want to modify or delete.
5. Record new local resource. This allows you to record a new resource over the phone.



## A Glossary

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

### A.1 CommPortal

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

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

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

### A.2 Logging into CommPortal as Another User

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

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

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

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

### A.3 Phones

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

## A.4 Phone Numbers

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

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

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

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

## A.5 MAC Addresses

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

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

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

## A.6 Departments

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

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

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

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

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

## **A.7 Phone Profiles**

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

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

- Aastra 53i
- Aastra 55i with 3 560M sidecars
- Aastra 57i with a 536M sidecar

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

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

### **A.7.1 Modifying Phone Profiles**

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

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

You can also modify other configuration in a phone profile.

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

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

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

### **A.7.2 Copying Phone Configuration**

If you need to replace a user's phone for them, because the old one breaks, you may have to copy the configuration of the old phone to the new phone. This is described in section 4.7.

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

## **A.8 Network**

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

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

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

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

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

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

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

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

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

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

## A.10 Multi Line Hunt Groups (MLHGs)

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

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

There are various distribution algorithms available:

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

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

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

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

## A.11 Call Pickup Groups

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

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

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

## A.12 Short Codes

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

## A.13 Extensions

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

## A.14 Account Codes

Account codes:

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

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

There are two types of account codes.

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

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

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

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

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

## **A.15 Auto Attendant – Easy Attendant / Premium Attendant**

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

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

## **A.16 Music On Hold**

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

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

#### **A.16.1 Music On Hold performing rights**

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

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

We do not accept any legal liability arising from copyright infringements associated with your use of Music On Hold, except where you use the Global Media Resources described in Section 11.1.3.



## B Appendix

### B.1 CSV files for Emergency Location data

**Note:** Any changes made to the location data must be synchronized with the database of the VoIP E911 provider. You must consult your Service Provider when making changes.

You will need to configure location data for one or more **Emergency Locations** on your premises. Each Emergency Location is a location specific enough to find an emergency caller. This could be as simple as a civic address, or, for larger premises, you may need to provide further identifying information, such as a floor, building, wing or office number. Note that a maximum of 15,000 location entries can be stored per Business Group. Attempts to upload a list with more than 15,000 entries will be rejected.

For each Emergency Location you configure, you must provide information about the wireless or wired connection that MaX UC clients will use when making calls in this location.

- For wireless connections, you must provide the BSSID of the WiFi Access Point in the location. The BSSID should be unique, and uploads will be rejected if this value is the same for two locations.
- For wired connections, you must provide the public IP address that connections in this location will appear on, along with the internal IP subnet that corresponds to this public IP address. Uploads with values in only one of those fields will be rejected.

If an Emergency Location offers both wireless and wired connections, you will need to include details for both of these connection types in the single entry for the physical location. The following table details the information you can provide for each Emergency Location. Fields where there is no value can be left blank. Note that all of the fields are optional, but that you must complete either the BSSID or PublicIP and InternalSubnet fields for the row in the CSV file to be valid.

Field	Description	Format	Maximum Length
BSSID	BSSID (machine name) for WiFi network. Can be blank if location is wired only.	String (one MAC address, 12 hexadecimal characters separated by colons. Can be upper- or lower-case.)	

Field	Description	Format	Maximum Length
PublicIP	Public IP that connections via this AP will appear on. Can be blank if location is wireless only.	String (validity of IP address will be checked but input will not be canonicalized.)	
InternalSubnet	Internal subnet corresponding to that public IP. Can be blank if location is wireless only.	String (in CIDR format. Will be validated and invalid subnets rejected.)	
ca:HNO	Civic address: number prefix	String	6 characters
ca:HNS	Civic address: number suffix	String	45 characters
ca:PRD	Civic address: pre directional	String	2 characters
ca:RD	Civic address: street name	String	200 characters
ca:STS	Civic address: street suffix	String	45 characters
ca:POD	Civic address: post directional	String	2 characters
ca:LOC	Civic address: address line 2	String	60 characters
ca:A3	Civic address: city	String	100 characters
ca:A1	Civic address: state/province	String	2 characters
ca:PC	Civic address: postal code	String	10 characters
ca:country	Civic address: country	String	2 characters

Example data is shown in the table below. The CSV file should be created using e.g. Excel.

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<b>BSSID</b>	<b>Public IP</b>	<b>Internal subnet</b>	<b>ca:H NO</b>	<b>ca:RD</b>	<b>ca:LOC</b>	<b>ca:A3</b>	<b>ca:A1</b>	<b>ca:PC</b>	<b>ca:country</b>
	198.51.100.120	192.168.3.0/24	123	Rose Street	Floor 1	Denver	CO	80202	US
00:00:5e:00:53:02	198.51.100.120	192.168.4.0/24	123	Rose Street	Floor 2	Denver	CO	80202	US
00:00:5e:00:53:cc			123	Rose Street	Floor 3	Denver	CO	80202	US

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