CLOUD VOICE BUSINESS PORTAL

Company Administrator Guide

January 2021

Contents

Introduction

The following provides a comprehensive user guide on how to use the Virgin Media Business Cloud Voice Business Portal. Where appropriate the guide will be backed up by screenshots to support the recipient of this guide.

For all help and support please visit virginmediabusiness.co.uk where you will find all our Cloud Voice guides or, alternatively, call us on 0800 052 0800.

Overview

The Business Portal allows users to configure their Cloud Voice service to suit their business needs for example how calls are handled. Configurations can be made by individual users to change their own service or Company administrators to make Site/Company-wide changes in one go.

The portal is available to the following individuals:

- Company administrator – the nominated individual who will govern and configure the Cloud Voice service for the whole company.
- Site (Group) administrator – the nominated individual who will govern and configure the Cloud Voice service for all users at a particular site or within a defined group.
- End user – the individuals using the Cloud Voice service who can configure their service to suit their individual needs.

The Business Portal can be logged onto from the following devices:

- Desktop (Windows/Mac) – Preferred
- Tablet
- Smartphone

The Business Portal supports the following browsers:

- Internet Explorer 8.0 and higher
- Firefox
- Chrome
- Safari

The Business Portal allows a Company Administrator to perform the following tasks:

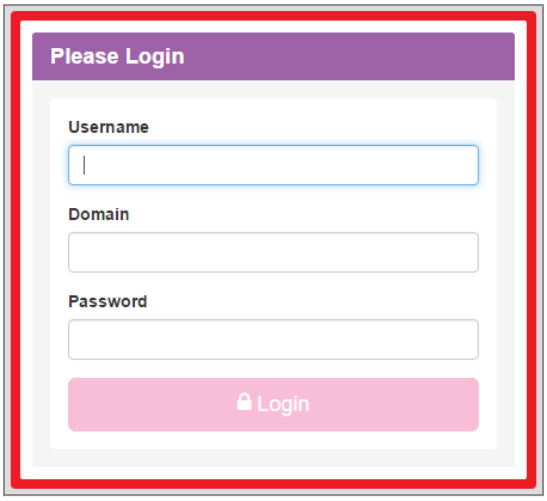
- Manage account details and passwords of Users, including password resets
- View a dashboard for a Company and Site(s)
- View Users' devices and add/modify additional devices
- Manage groups
- Manage Site features
- Manage User features including removal/restriction of features
- Add new Users to an existing Site (where enabled)
- Modify an existing Users licenses, including changing, adding or removing (where enabled)
- Cease an existing User or Users add-ons (where enabled)
- Change a User's phone number (where enabled)

The Business Portal allows a Group Administrator to perform any or all of the following tasks, depending on what privileges they have been assigned by the Company Administrator:

- Manage account details and passwords of Users, including password resets
- View a Company and Site dashboard
- View Users' devices and add/modify devices
- Manage groups
- Manage Site features
- Manage User features including removal/restriction of features
- Add new Users to an existing Site (where enabled)
- Modify an existing Users licenses, including changing, adding or removing (where enabled)
- Cease an existing User or Users add-ons (where enabled)
- Change a User's phone number (where enabled)

Throughout this document the terms User and Employee will be interchanged, but both mean the same thing- a person using the service and who has access to the Business Portal

Logging into the Portal



https://www.vmbcloudvoice.virginmediabusiness.co.uk/businessportal/

The Username, Domain and Password details will be sent to the End User in the Welcome Email once the user has been provisioned on the Cloud Voice service.

Password Ageing

Passwords will expire every 90 days and a User will be asked to enter a new password once this period has expired. When changing this password, a User will not be able to use the previous password. When entering a new password, the following rules must be adhered to:

- Password Length: 8 characters
- Convention: 1 uppercase letter, 1 number and 1 special character

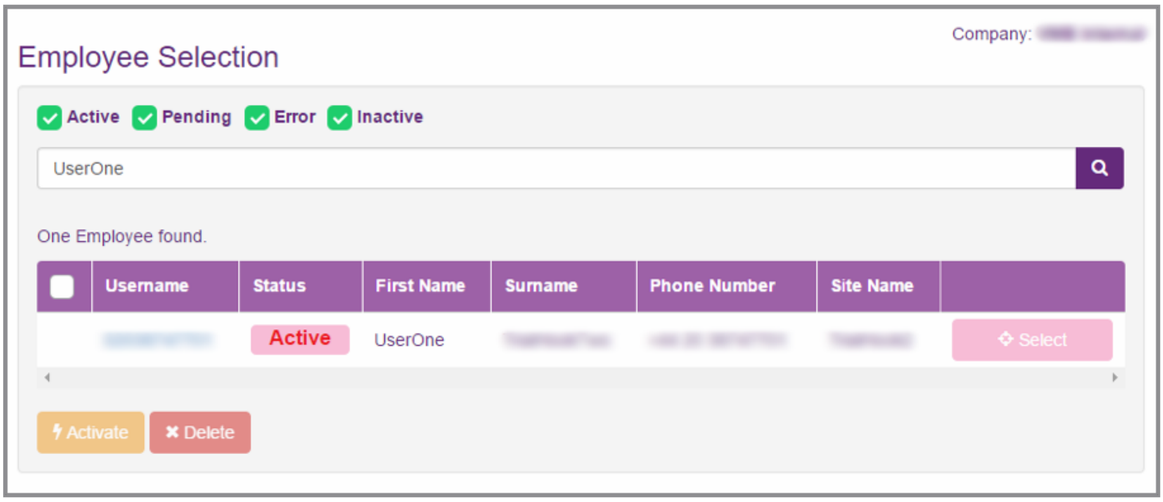
Password Resets

Company Administrator Reset

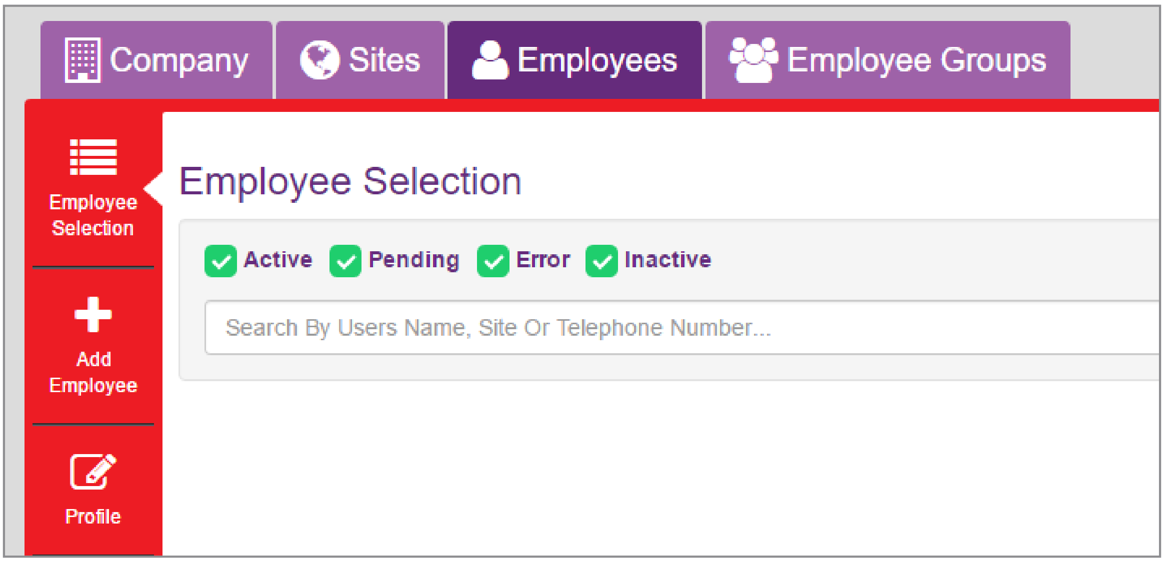
Password resets for Company Administrators can only be carried out by Virgin Media Business. If you need to reset a password, please contact Virgin Media Business.

Group/User Administrator Reset

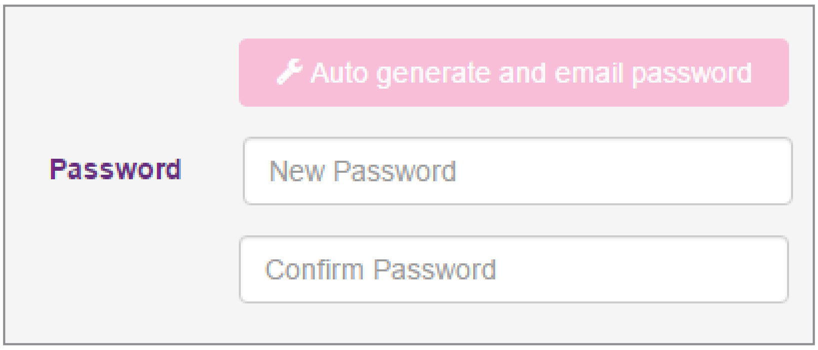
If a Group Administrator or User needs a password reset, this can be completed by a Company Administrator. Simply log into the Business Portal using your Company Administrator credentials, locate the Site, select Employees, locate the User and click on **Select.**



Click on **Profile** from the left-hand administration bar.



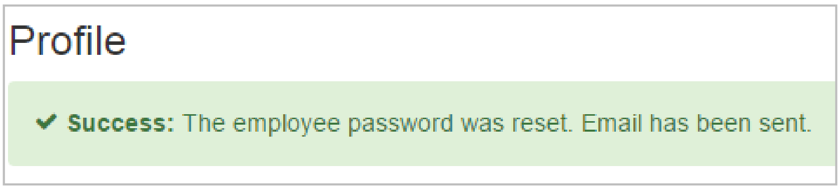
Select **Auto generate and email password** to reset the password and send this directly to the registered user.



Once selected this will display the following warning message. Please select **OK** to proceed.

The user's password will be reset and an email will be sent using the address specified in the user's profile. All unsaved changes will be lost. Click OK to continue.

Once selected this will display the following Success message, indicating the password has been reset and sent.



Locked Accounts

If you enter the wrong credentials into the portal three times in a four-hour period, your account will be locked. This account will then stay locked for four hours, after which you can then enter the correct credentials.

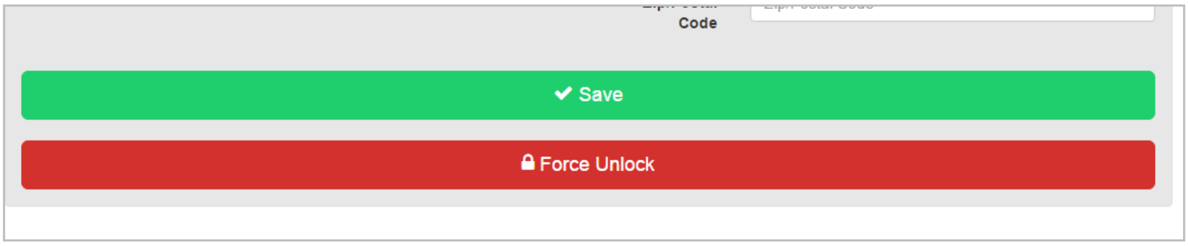
Alternatively you can contact your administrator, who can use the Force Unlock option to unlock this ahead of the four-hour period, and if needed reset the password.

Company Administrator Force Unlock

If you lock yourself out of your account you will need to contact Virgin Media Business, who can unlock this for you.

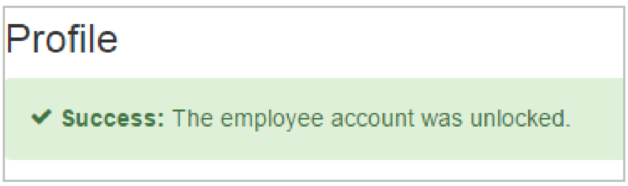
Group/User Force Unlock

If a Group Administrator or User needs their account unlocked, this can be completed by a Company Administrator. Simply follow the steps identified in the Password Reset section above to locate the User, then select the **Force Unlock** option.



Once selected, this will display the following warning message. Please select **OK** to proceed. The users account will be locked. All unsaved changes will be lost. Click OK to continue.

Once selected this will display the following Success message indicating the account has been unlocked. Please note that no email is sent when you unlock an account.



Portal Quick-Reference Guide

The following screenshots are used to provide a quick overview of the high-level functionality of the portal at a Company/Group Administrator level.

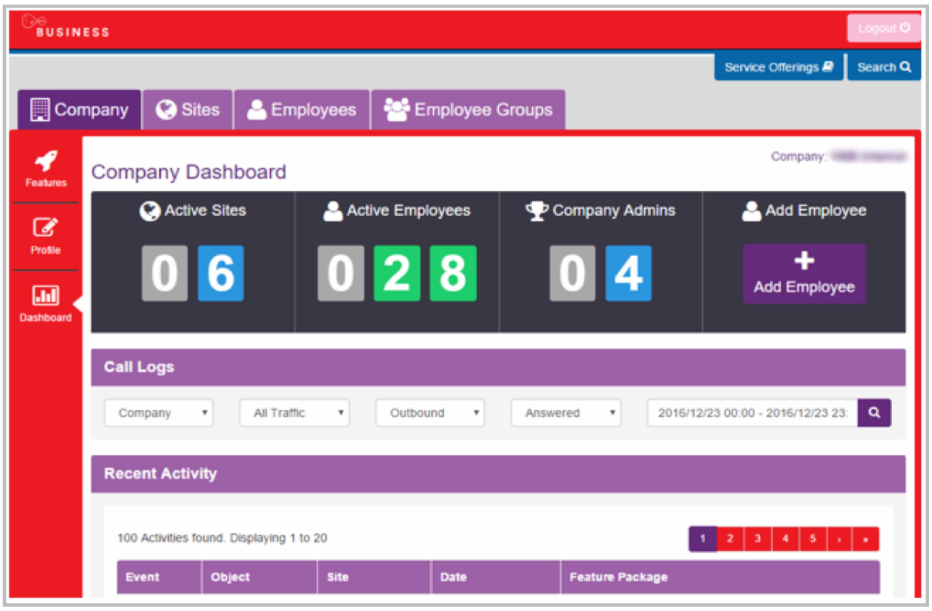
Tabs

The Business Portal uses tabs to navigate to the different sections of the portal and by default the landing page is the Company dashboard for Company Administrators. You can use the top navigation tabs to manage Sites, Employees and Employee Groups. The side navigation tabs (left-hand side) provide you with administration and management options within the selected Company, Site, Employee or Employee Groups.

Company Dashboard & Quick Statistic Tiles

As Company Administrator, you'll be presented with the following dashboard when you log in. This view will provide you with a visual quick stats section, displaying the following key information:

- Number of Active Sites
- Number of Active Employees
- Number of Company Admins
- Add Employee option (Note, though the link works, the functionality is disabled as this will impact your Agreement. To add employees please speak to Virgin Media Business)
- Call Logs
- Recent Activity

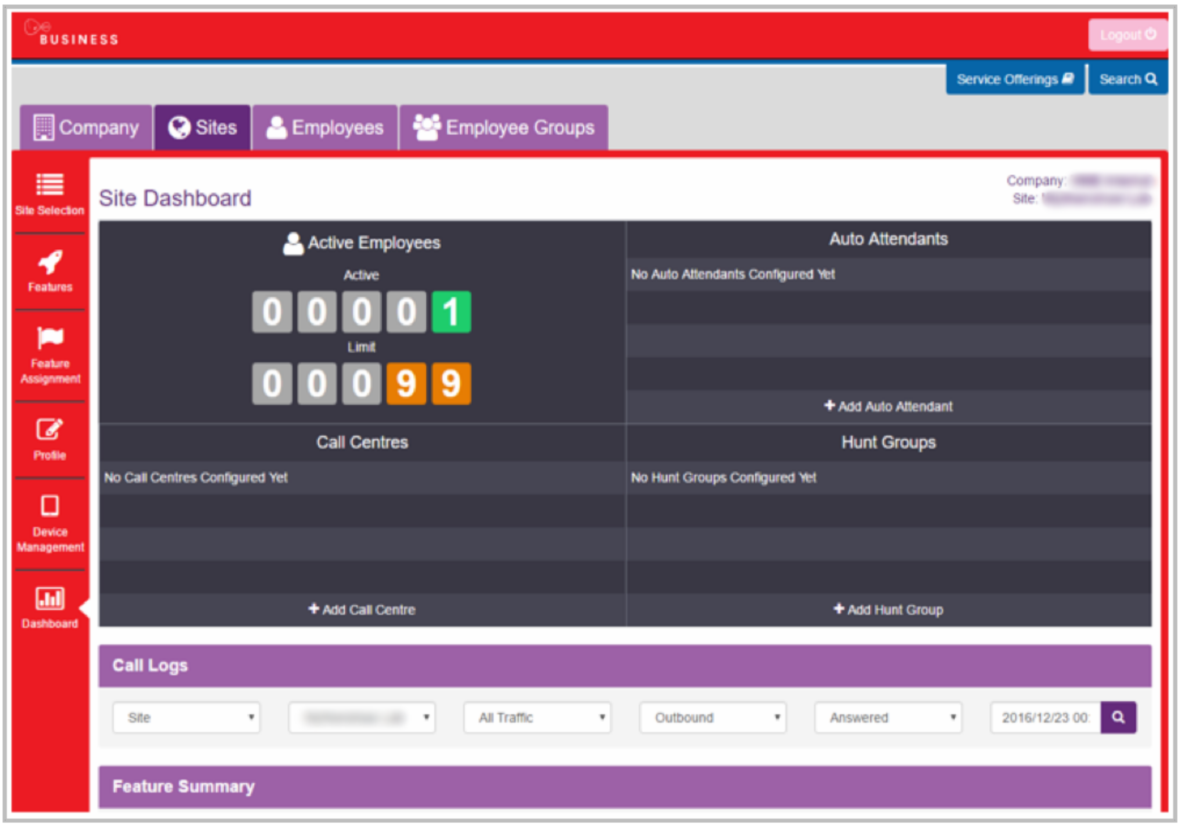


Site Dashboard & Quick Statistic Tiles

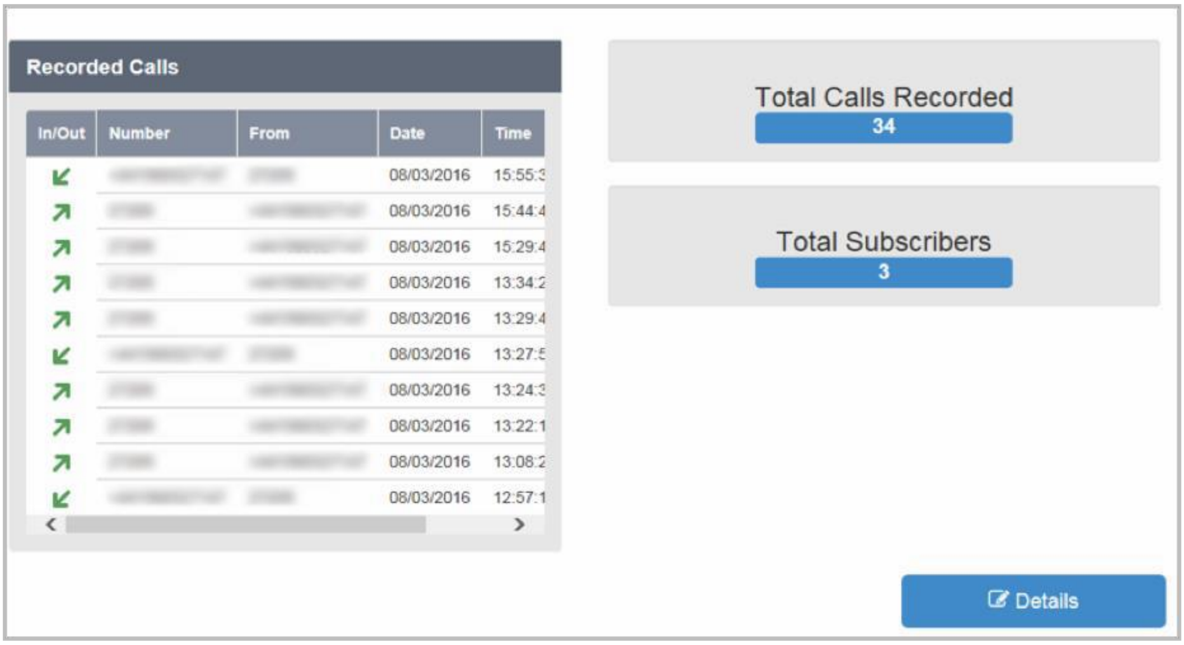
If a Group Administrator is created then they will not see the Company dashboard, but may see the Site Dashboard, Site Selection or Employees area. This is dependent on whether the Group(s) that they are administering is also a Site. A Group Administrator can only manage features within the group they have been assigned to.

Assuming the Group Administrator is allowed to administer the Site, the following will be displayed:

- Number of Active Employees
- Number of Auto Attendants created
- Number of Call Centers created
- Number of Hunt Groups created
- Recorded Calls (where enabled)
- Call Logs
- Feature Summary



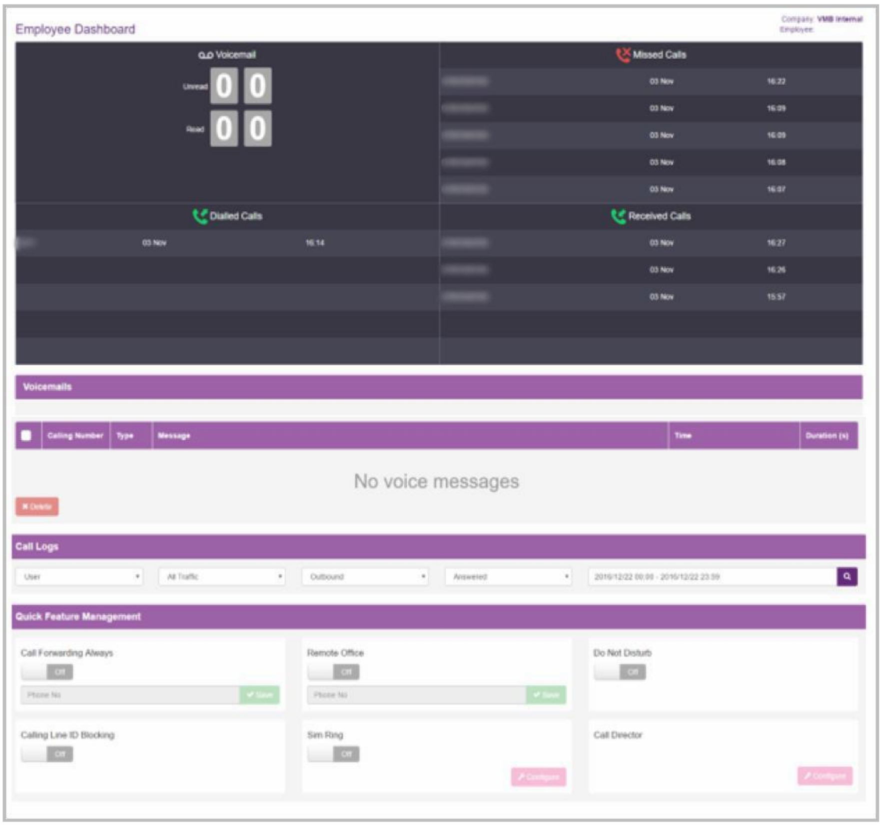
If you have Call Recording enabled then the dashboard display will look slightly different and include a section called Recorded Calls directly below the tiles, as per the image below.



Employee Dashboard & Quick Statistic Tiles

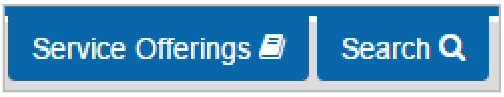
An administrator is able to log into the Employee Dashboard which will show them the following key information:

- Voicemail Notifications – Unread and Read
- Missed Calls – Number, Date and Time
- Dialed Calls – Number, Date and Time
- Received Calls – Number, Date and Time
- Recorded Calls – Last 10 recorded calls, calls in progress (only if enabled)
- Call Logs – user-level call data and analysis
- Quick Feature Management – top features



Service Offerings

The Service Offerings menu lists the **Feature Packages** that are available for Sites and Employees. This can be found at the top-right of the page:



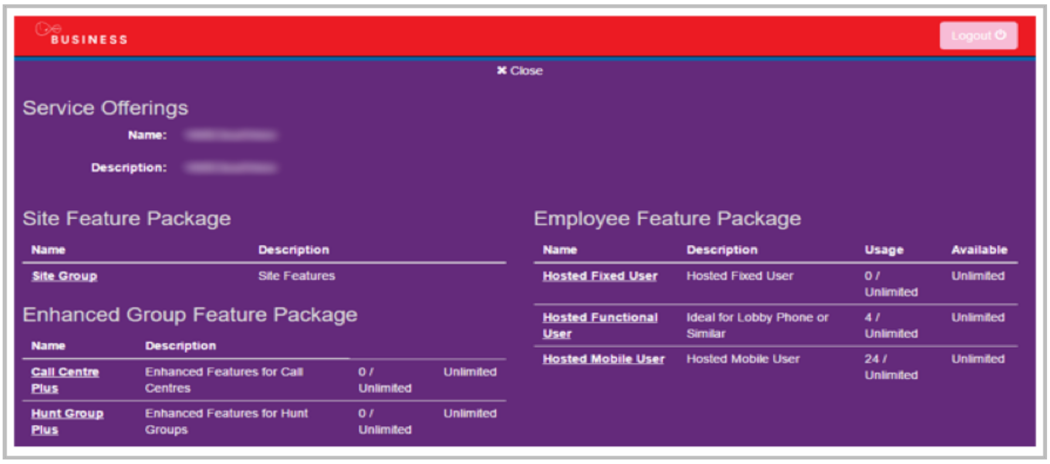
A Feature Package represents a specific collection of service features. You can use this information to determine which Feature Package you have assigned to each Employee and Company. Optional Add-On Features can also be viewed here.

The Service Offerings tab will offer up different information, depending on which tab has been selected. This is summarised below:

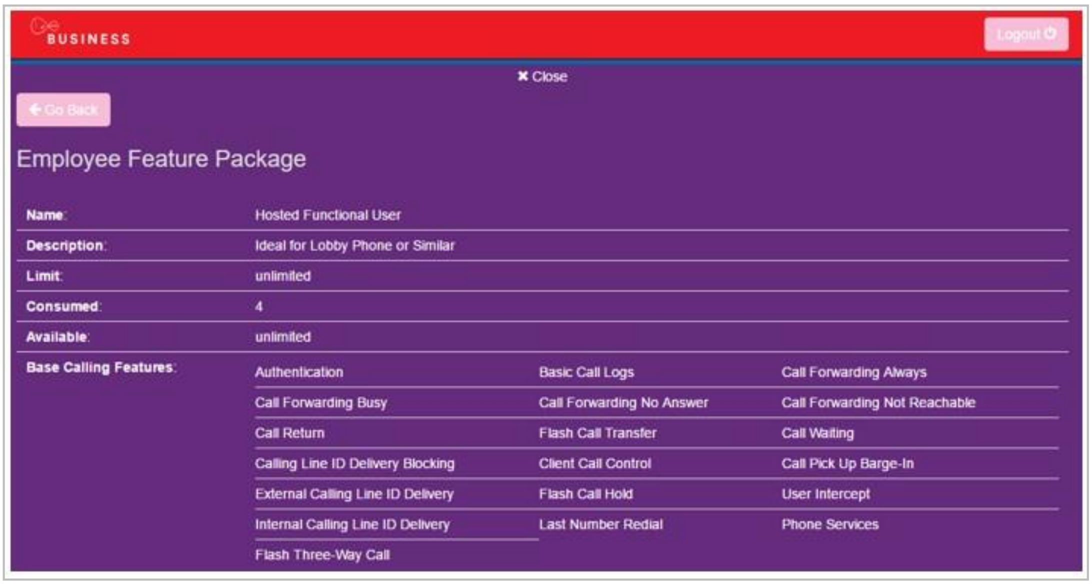
Object	Service Offerings Tab
Company	Displays all available Site and Employee Feature Packages and Add-Ons company-wide

Site	Displays the Site Feature Package and Add-Ons assigned to the Site and all Employee Feature Packages and Add-Ons that are available for Employees under the Site
Employee	Displays the Feature Package and any Add-Ons assigned to the Employee

As a Company Administrator, you will be presented with the following view



To then view the features within a package you simply need to click the package, which will then present the following views:



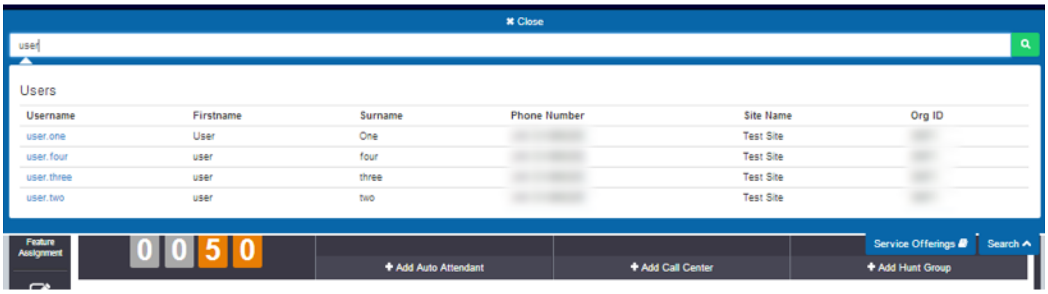
Live Search Function

You can use the Search function at the top of the page to search on a number of objects within the same company:

It offers a dynamic search facility across the following fields:

- Username
- Firstname
- Surname
- Phone Number
- Site Name

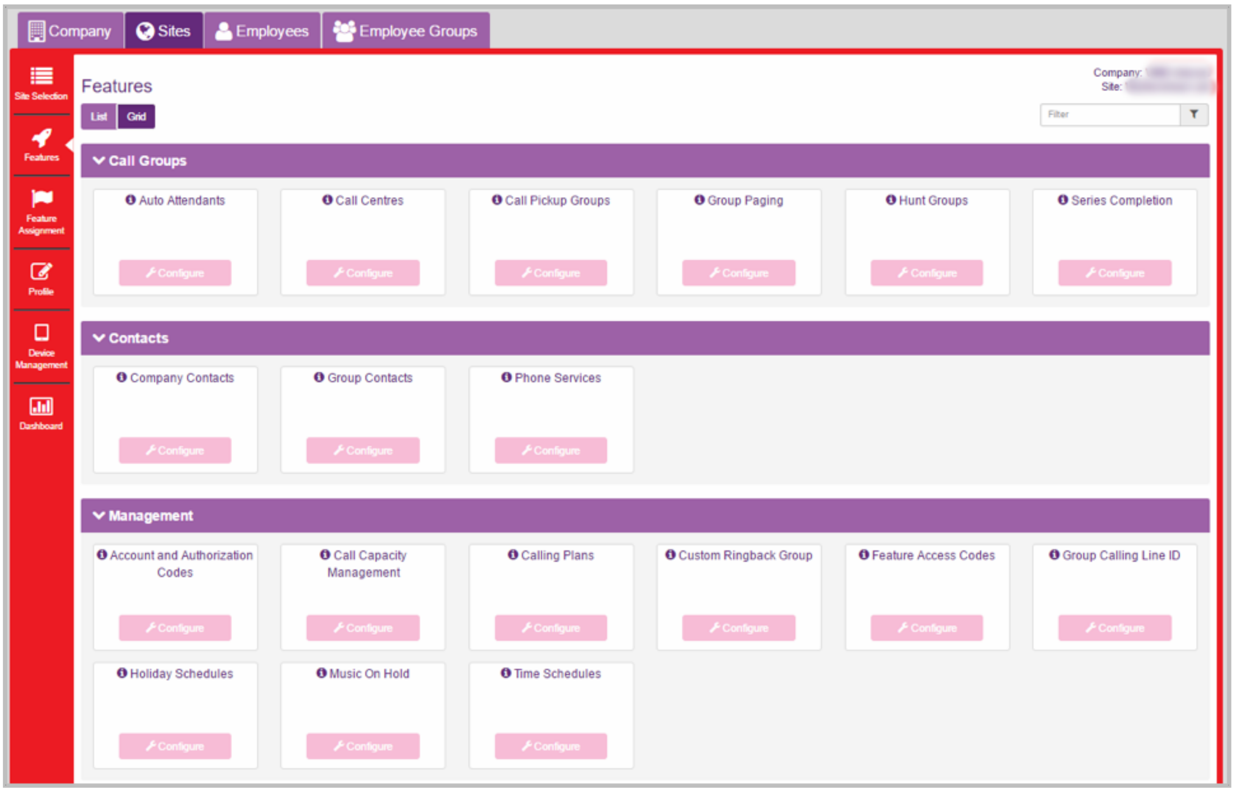
Administrators simply need to type in the criteria (full or partial) and it will list all matches:



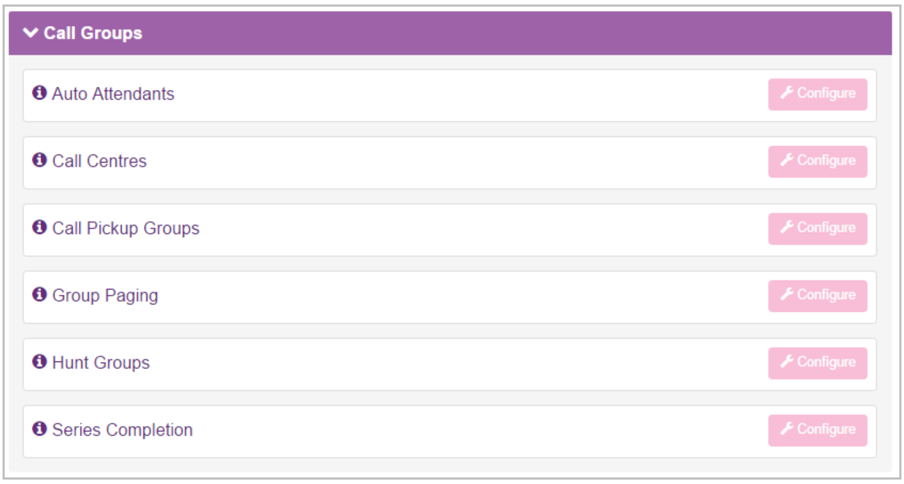
General Portal Views and Information

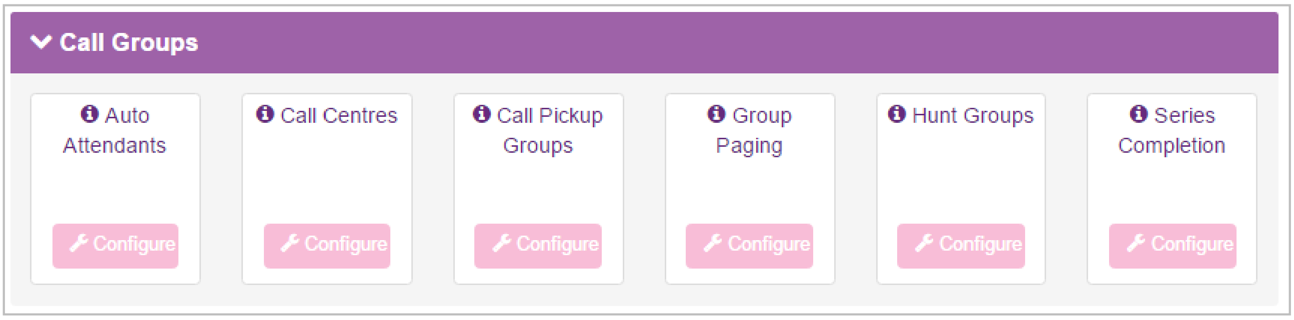
As a Company Administrator you can view features at a Site or Employee level.

From the **Site** or **Employees** tab, select a site or employee and you will then be able to open the **Features**tab on the left side. This will open up the Features view:

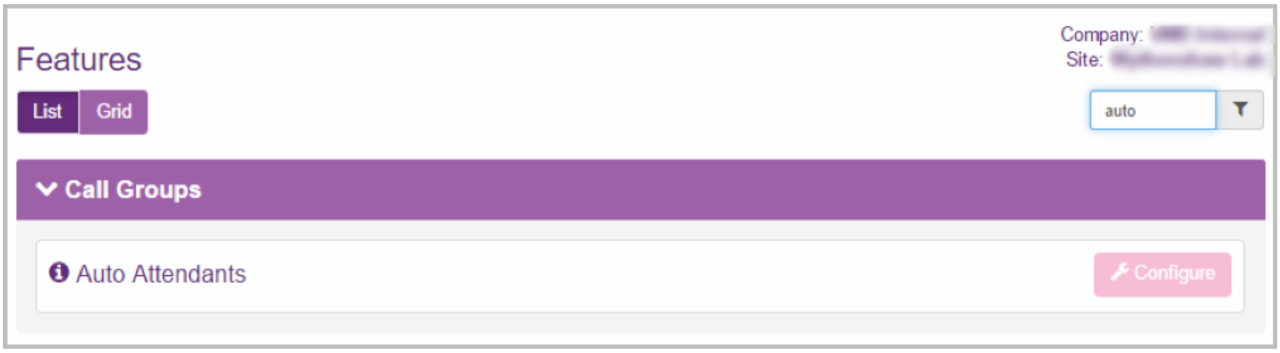


You have the option of viewing these as either a List or Grid view:





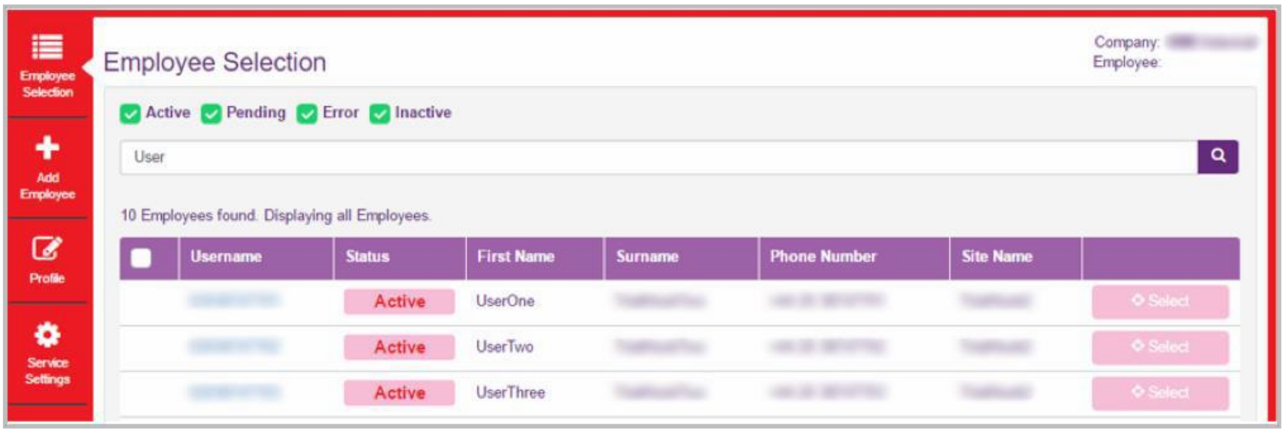
For a Feature description and more information, hover over the Icon. A brief summary will appear:



Some screens have filter options that allow you to dynamically filter the options displayed on the screen.

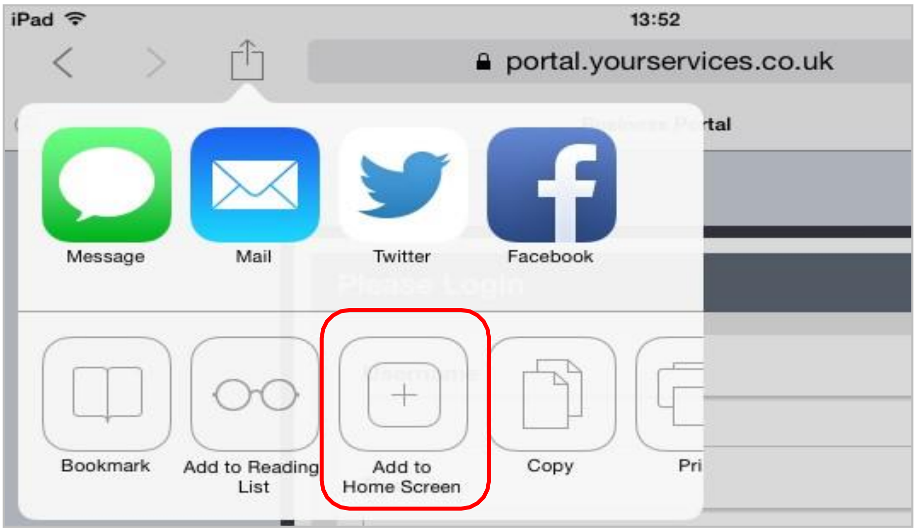
Additionally, the Site Selection, Employee Selection and Group Selection pages have search options which allow you to search through the following data:

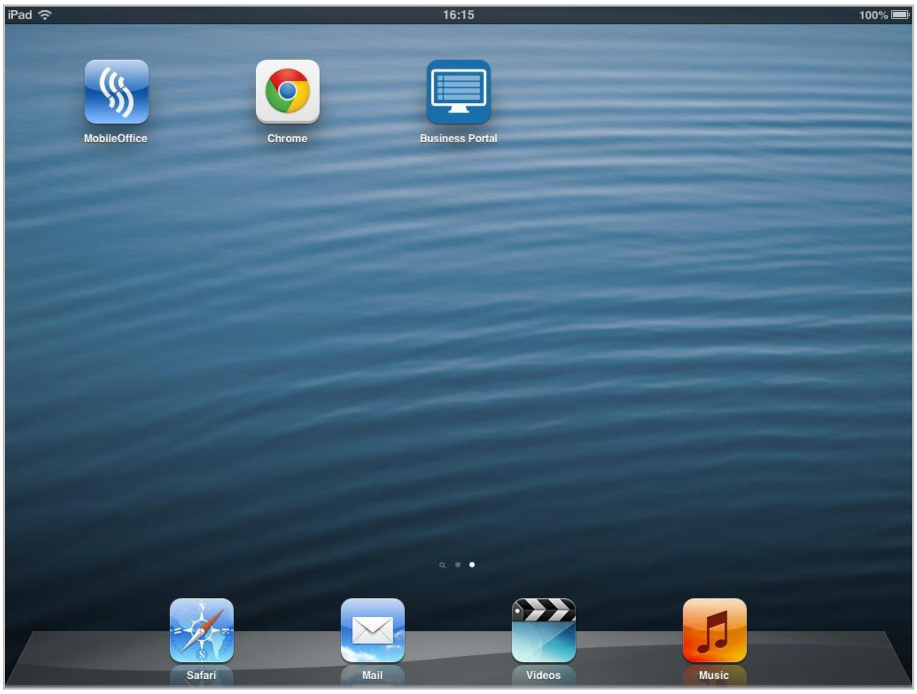
- Site Selection
- Site Name
- Group Selection
- Group Name
- Employee Selection
- Username
- Firstname
- Surname
- Phone Number
- Site Name



Saving the Business Portal as a Home Screen on iOS

Access the Business Portal on your iOS device and you can save it to the home screen. By doing so, it effectively behaves like an app:





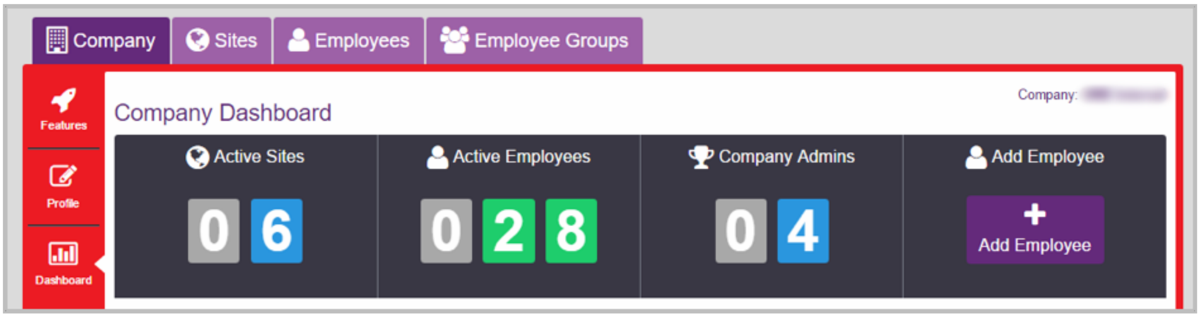
BUSINESS

Dashboard Description – Company

Quick Statistic Tiles

Select a Company and click on the **Dashboard** to be presented with a visual quick stats section that will display the following:

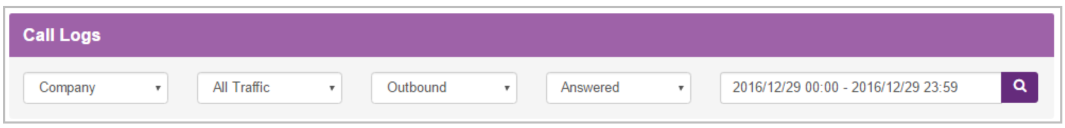
- Number of Active Sites
- Number of Active Employees
- Number of Company Admins
- Add Employee option: Please note, to add employees, you will need to contact Virgin Media Business. You will not be able to add an employee through the portal as this will impact your contract with Virgin Media Business.



Call Logs

Call Logging provides company-wide call records, plus comparison and analytical tools for tracking and improving the efficiency and effectiveness of business communications.

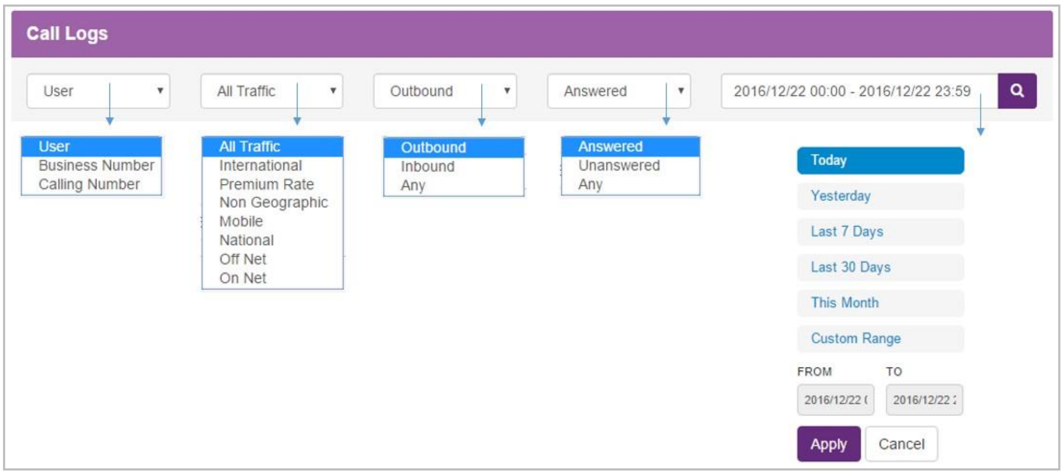
An intuitive, feature-rich interface allows you to visualise trends and patterns, zoom in on detailed data or view key headline information at a glance. Call Logging is accessed via the Dashboard in the Business Portal from anywhere and on any device via a Web Browser and Internet connection.



The search bar may display different options depending on your account privileges. You are able to build your search by first selecting your criteria from the options boxes and then secondly by clicking the magnifying glass to submit the search and view the results. The Graph and Compare Views, List View, Type View and Top 10 Views (detailed below) will display the results based on your chosen search. There is a maximum delay of approximately 15 minutes for new calls to be displayed.

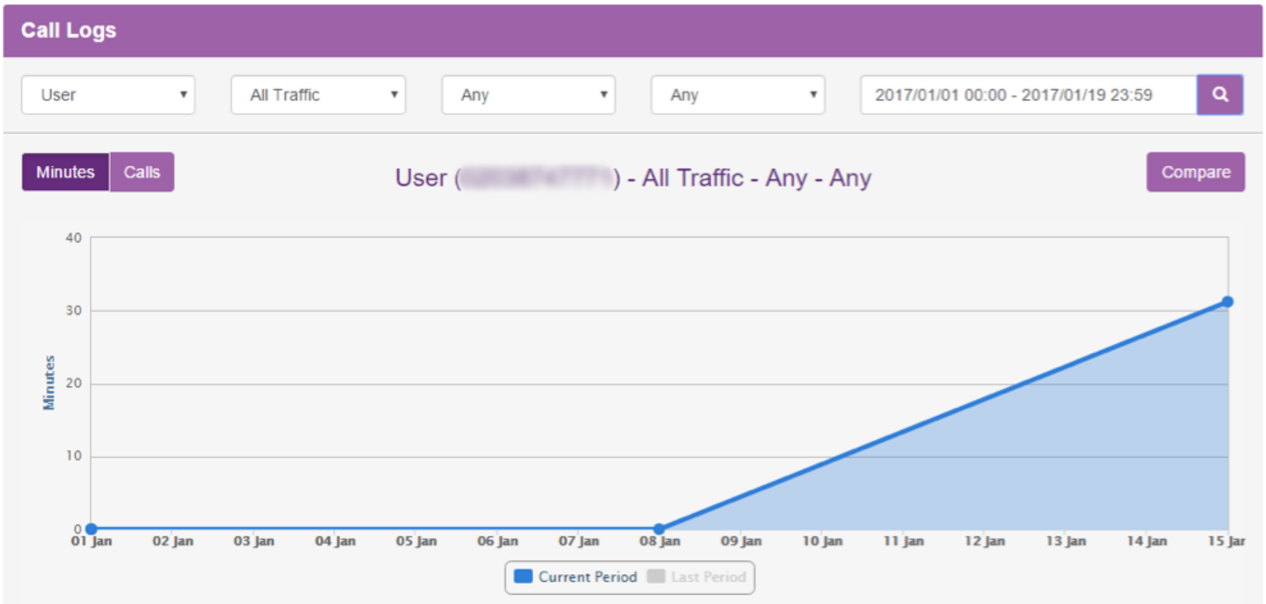
The search criteria available are:

- **Object** – Company, Site, User (by Username), Business Number (by full or partial telephone number), Calling Number (by full or partial telephone number)
- **Traffic** – All Traffic, International, Premium Rate, Non-Geographic, Mobile, National, Off-Net, On-Net
- **Direction** – Outbound, Inbound, Any
- **Status** – Answered, Unanswered, Any
- Date Range



Graphical View and Compare

When your results are returned, the Graphical View displays total calls or minutes for the current month by hour, day, week or month. You can zoom into the graph for monthly down to hourly views and pan across the graph to move to the previous or next period of time. You can hover over each data point dot on the graph to display the values.



- Zoom between Hourly, Daily, Weekly and Monthly data
- Use the interactive graph to pan and hover for more data
- A comparison feature overlays the previous month's data results, allowing you to analyse patterns and trends
- You can switch between the views detailed below using the View Button

BUSINESS

List View

The List View provides individual call information on the results of your search, including the Business Number, Time, Duration, Calling Number, Destination and Call Status.

List Type Top 10 ▾ Export

Show 10 entries Page 1

Business Number	Time	Duration (s)	Calling Number	Destination	Call Status
	18/01/2017 10:10:45 AM	5		Off Net Originating Call	
	18/01/2017 10:09:53 AM	3		Off Net Originating Call	
	18/01/2017 10:08:47 AM	7		Unanswered Call	
	18/01/2017 10:07:07 AM	3		Off Net Originating Call	
	18/01/2017 10:00:13 AM	5		Unanswered Call	
	18/01/2017 09:59:19 AM	11		Unanswered Call	
	18/01/2017 09:55:23 AM	8		Unanswered Call	
	18/01/2017 07:45:58 AM	32		Off Net Originating Call	
	18/01/2017 07:45:36 AM	10		Off Net Originating Call	
	18/01/2017 07:45:07 AM	21		Off Net Originating Call	

Showing 1 to 10 of 64 entries 1 2 3 4 5

You can order the List View results by ascending or descending Time or Duration by clicking on the corresponding column title. Browse the data by selecting the number of entries to display and/or by navigating through the result pages

Type View

List Type Top 10 ▾ Export

Type	Minutes	Total %	Calls	Total %
Off Net	7.83	25.1%	43	67.2%
On Net	23.37	74.9%	21	32.8%
Total	31.2		64	
Inbound	22.73	72.9%	14	21.9%
Outbound	8.47	27.1%	50	78.1%
Total	31.2		64	
Answered	28.15	90.2%	41	64.1%
Unanswered	3.05	9.8%	23	35.9%
Total	31.2		64	

The Type View allows you to instantly compare different types of calls to provide key information including the amount of Off-Net calls versus On-Net calls, Inbound versus Outbound and Answered versus Unanswered.

The Type View displays the percentage split of total minutes and total calls for each call type. This is a useful feature to instantly view how many of your calls are On-Net (often within the Company or between Sites a free of charge) versus Off-Net calls to people outside of your Company. It allows you to see how calls are being handled and monitor performance by viewing the incoming and outgoing call split and percentage of answered and unanswered calls.

Top 10 View

The Top 10 View provides the 10 highest results based on your search and top 10 category selection. For example, this allows you to see the top 10 destinations or numbers involved in calls across your whole Company, individual users or Groups. Click the Top 10 View button and select your category from the list of Calling Number, Destinations, International Calls, Mobile Calls and National Calls. For example, if your search was for all outbound, answered or unanswered calls for a Site and you select the top 10 International Calls, then the Top 10 View will display the top 10 most frequent international numbers being dialed by that Site and all of its Employees.

This is a useful feature to instantly view what regions a marketing campaign is targeting, which of your Customers are called or call you the most, the most popular international destinations, which Customers call Customer Service the most and which Employees answer the most calls to these numbers, etc.

The Top 10 view allows you to see what the most popular calls are being made and received, increase business effectiveness and reduce costs.

Export Tool

The export tool allows you to export the current data in the chosen search and view as a CSV file. Click the **Export** button – this will automatically download all of the data in the current view in comma-separated values format.

Recent Activity

The Recent Activity section of the Company Dashboard shows the recent provisioning activity for Sites, Employees and specific Site Features such as Call Centers that generate provisioning events. These events include activating, modifying and deleting Employees, and assigning/removing Feature Packages from Call Centers and Hunt Groups. The table will show the last 100 events and after 2 years entries will be removed.

The information on each event shows the Event Type (e.g. Create Registration), the Object (e.g. its Username), the Site for which the event occurred, the Date the event occurred and any Feature Package assigned to the Object.

Recent Activity

100 Activities found. Displaying 1 to 20

1 2 3 4 5

Event	Object	Site	Date	Feature Package
Create Registration	[illegible]	[illegible]	21 Dec 2016 11:13	Hosted Functional User
Create Registration	[illegible]	[illegible]	21 Dec 2016 10:20	Hosted Functional User
Create Registration	[illegible]	[illegible]	21 Dec 2016 09:11	Hosted Functional User
Create Site	[illegible]		20 Dec 2016 15:30	Site Group (Auto Attendant)
Modify Registration	[illegible]	[illegible]	15 Dec 2016 12:32	Hosted Mobile User (Busy Lamp Field/Call Recording/UC Office Desktop)
Modify Site	[illegible]		11 Dec 2016 12:26	Site Group (Auto Attendant/Call Centre ACD)
Modify Subscription	[illegible]		11 Dec 2016 12:23	None
Modify Site	[illegible]		11 Dec 2016 11:12	Site Group (Auto Attendant/Call Centre ACD)
Modify Site	[illegible]		11 Dec 2016 10:53	Site Group (Auto Attendant/Call Centre ACD)
Modify Subscription	[illegible]		11 Dec 2016 10:51	None
Modify Registration	[illegible]	[illegible]	10 Dec 2016 15:39	Hosted Mobile User (CRM Connect)
Modify Registration	[illegible]	[illegible]	10 Dec 2016 15:38	Hosted Mobile User
Modify Site	[illegible]		10 Dec 2016 15:35	Site Group (Auto Attendant/Call Centre ACD)
Modify Subscription	[illegible]		10 Dec 2016 15:33	None
Modify Site	[illegible]		10 Dec 2016 14:48	Site Group (Auto Attendant/Call Centre ACD)
Modify Site	[illegible]		10 Dec 2016 14:48	Site Group (Auto Attendant/Call Centre ACD)
Modify Site	[illegible]		10 Dec 2016 14:47	Site Group
Modify Site	[illegible]		10 Dec 2016 14:45	Site Group (Auto Attendant/Call Centre ACD)
Modify Site	[illegible]		10 Dec 2016 14:47	Site Group (Auto Attendant/Call Centre ACD)

Please note that this section will not display changes made within features, i.e. a User changing their Simultaneous Ring setting.

Dashboard Description – Site

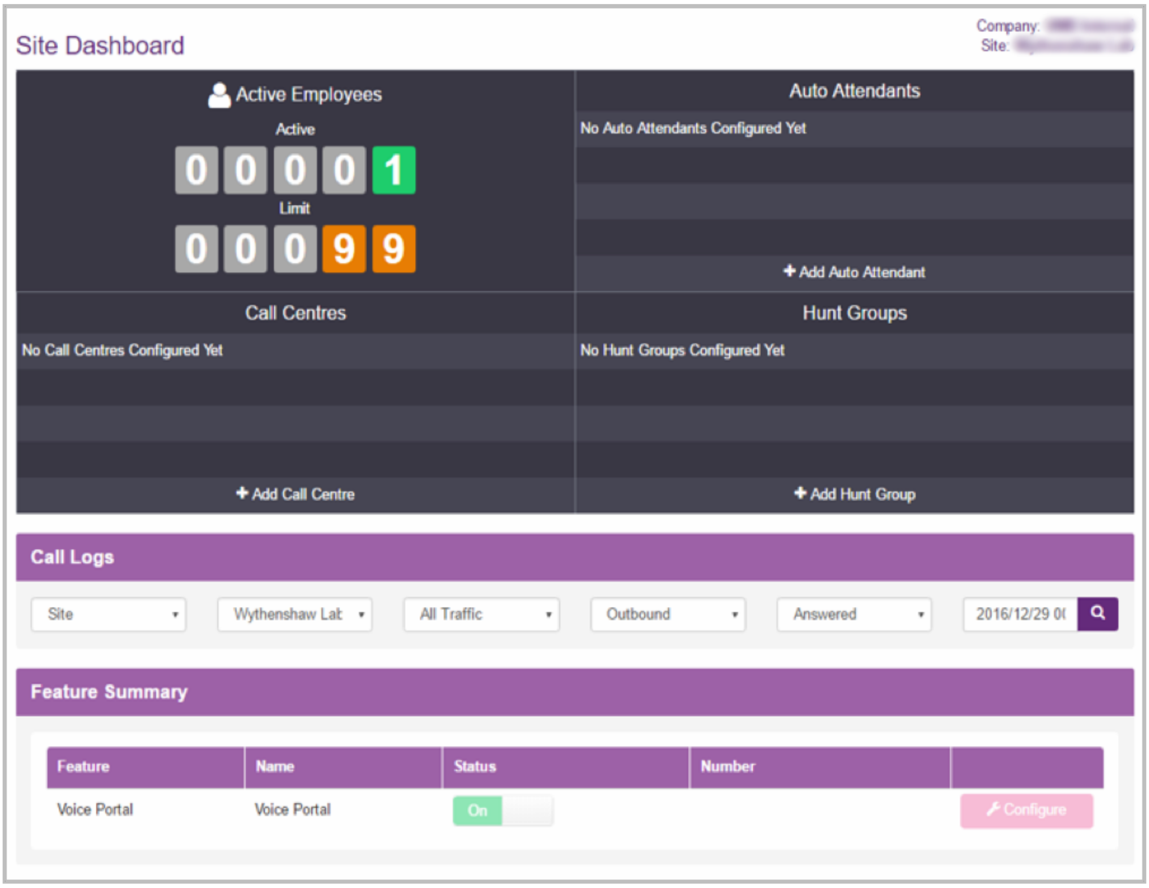
Quick Statistic Tiles

A Company Administrator clicking onto a Site dashboard or a Site Administrator logging in will be presented with the following visual quick stats:

- Number of Active Employees
- The Limit of Employees

(Corresponding to the number of employee licenses purchased for the Site)

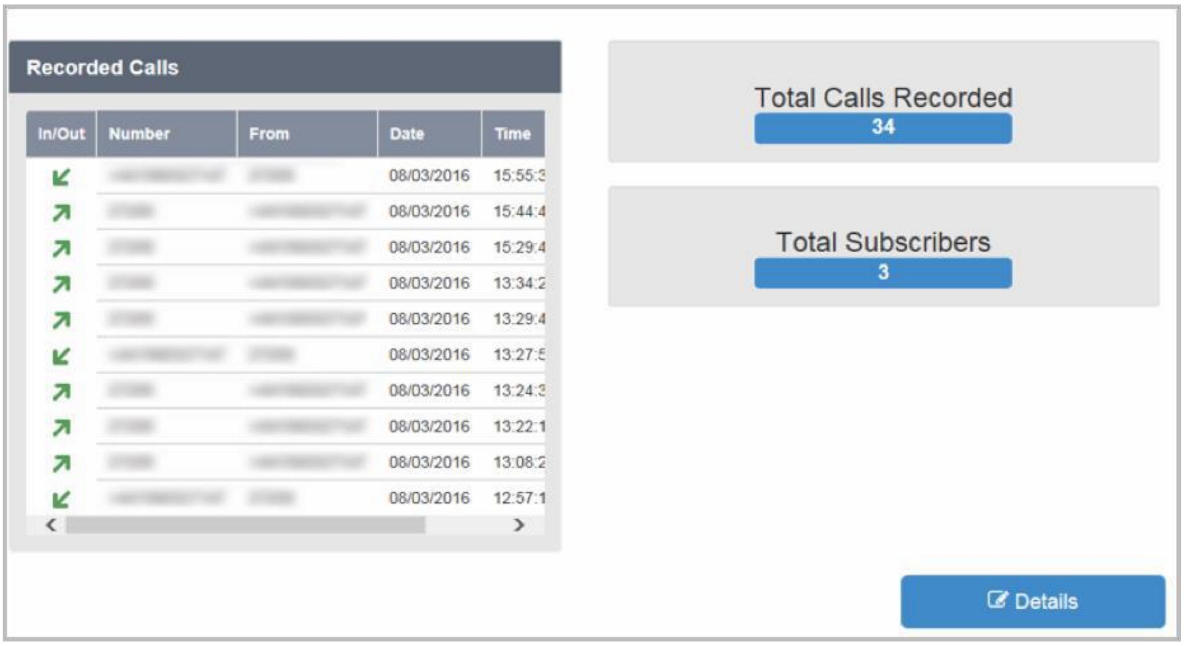
- List of Auto Attendants, including a shortcut to create a new one
- List of Call Centers, including a shortcut to create a new one
- List of Hunt Groups, including a shortcut to create a new one



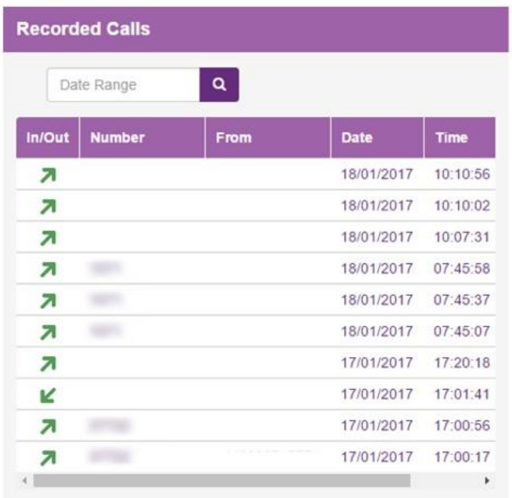
Recorded Calls (if enabled)

The Site Dashboard contains a section on Call Recording when the Virgin Media Business Administrator has enabled this, if the product has been purchased as part of your Agreement. This is divided into four areas:

- Recorded Calls
- Total Calls Recorded
- Total Subscribers
- Details

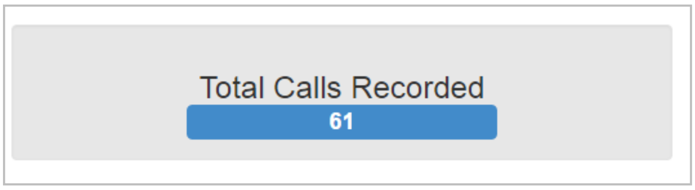


Recorded Calls screenshot can be seen below and contains the following, which is informational only:

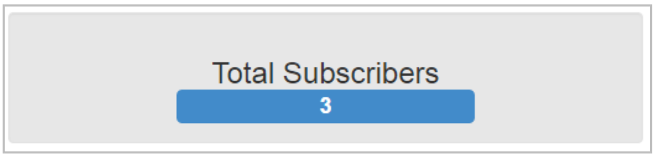


- Last 10 recorded calls, including In/Out, Number, From, Date, Time, Duration

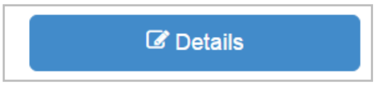
A **Total Calls Recorded** screenshot can be seen below and displays a total count of how may recorded calls there are on the Site:



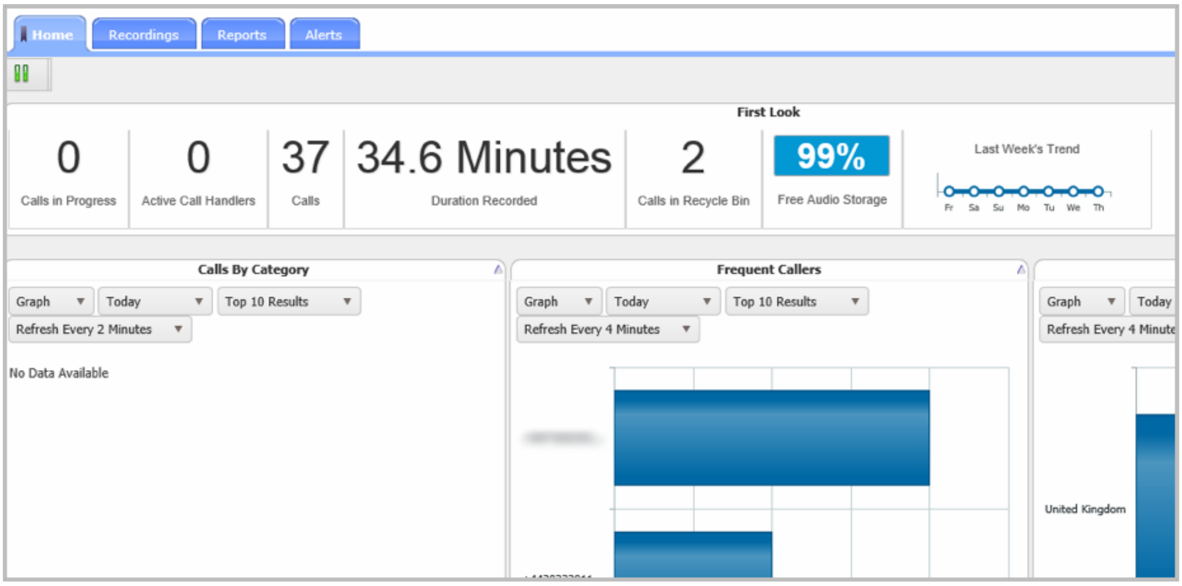
A **Total Subscribers** screenshot can be seen below and displays a total count of Users who are having their calls recorded:



If the **Details** button is selected, this will open up the Call Recording portal in another window.



From here the Company and Group Administrator may see calls, play calls, delete calls and manage their Call Recordings. Please review the *Cloud Voice Business Portal – Voice Recording Application User Guide* for further details on how to use this.

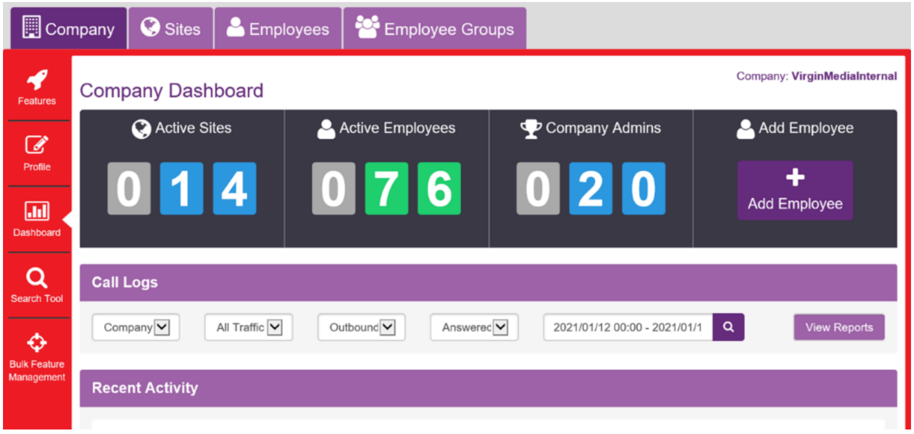


Call Logs

Call Logging provides a Site’s call records, comparison and analytical tools for tracking and improving the efficiency and effectiveness of business communications. The function works the same as described above in the *Company* section.

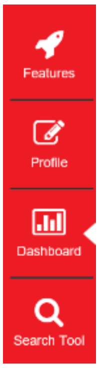
Managing Company’s

This allows the Company Administrator to manage the Company Profile, view the Company Dashboard and use the Search Tool.



Company Sidebar

When you select the Company tab you will be presented with a left-hand side bar, which provides administrative functions for that Company, as per the screenshot:



Features - Configure Company Features (NOT APPLICABLE FOR CLOUD VOICE)

Profile – the Company Profile lists all the details associated to the Company. This is informational only and not used.

Dashboard – The Dashboard allows you to access Call Logging and review recent billable activity.

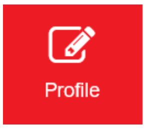
Search Tool – the Search Tool allows you to perform a search on a number of parameters, including telephone number and username.

Features

This feature is not applicable for Cloud Voice.

Profile

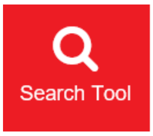
This section is not used so please do not make any changes in here.



Dashboard

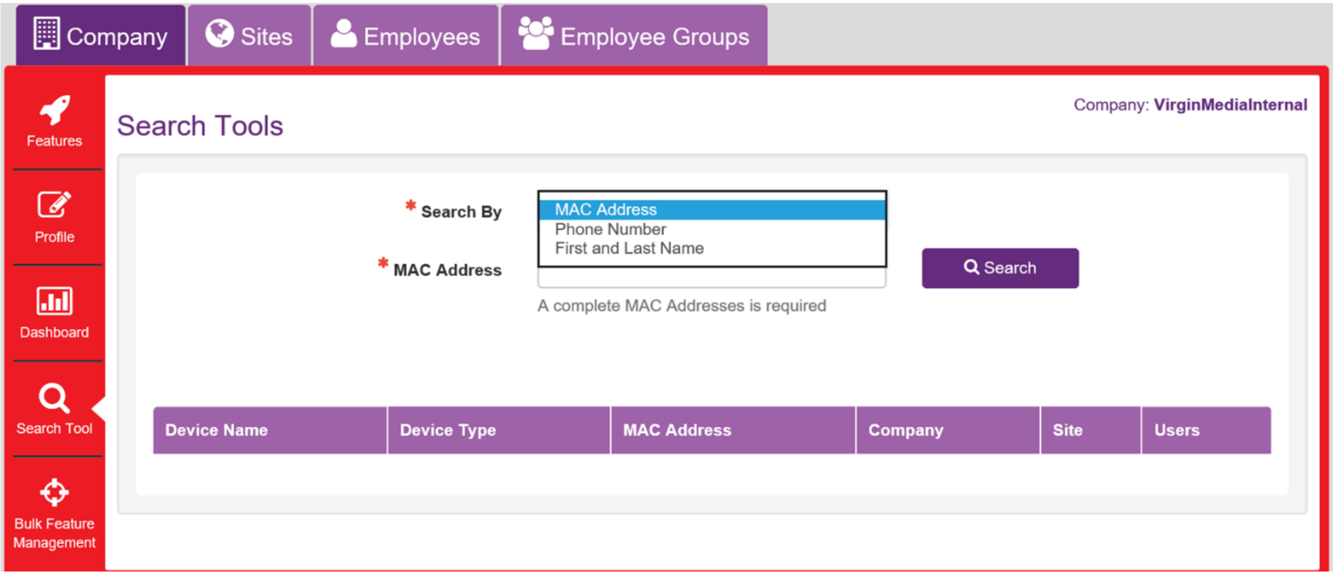
This section is has already been explained in the dashboards section of this guide, above.

Search Tool



This section is used to perform a search across the Company by IP Phone MAC Address, Telephone Number and Name.

Once logged into the Business Portal you will see the Search Tool icon in the left-hand panel. Once you select Search Tool you will be taken to the next screen where you can use the Search by dropdown to perform either of the searches shown below, and described in the next sections.

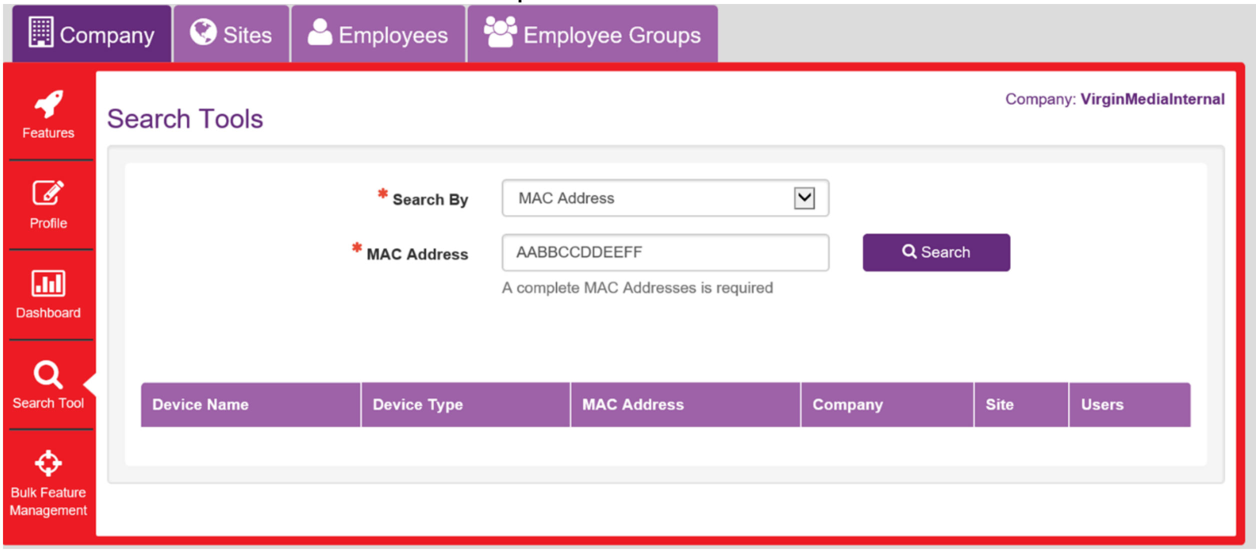


Search by MAC Address

If you want to locate a specific IP phone device to see which Site or User it belongs to, you can perform a Companywide MAC address search.

- Select MAC Address from the Search By parameter.

- Input the MAC address of the device into the MAC Address field, all in uppercase.
- Select the **Search** button to perform the search



- If the device is found it will return a table similar to the one below, listing the Company and Site that it is allocated to. If the device is allocated to a User the **Users** column will be populated with view which acts as a hyperlink. If it allocated to a site but not a user then the **Users** column will say **none**.

Device Name	Device Type	MAC Address	Company	Site	Users
1234567companyadmin	Polycom VVX 301	AABBCCDDEEFF	VirginMedia	xxxx	view

- Select the **view** hyperlink button to open up an informational pop-up window which will then display further details on the user behind the device.

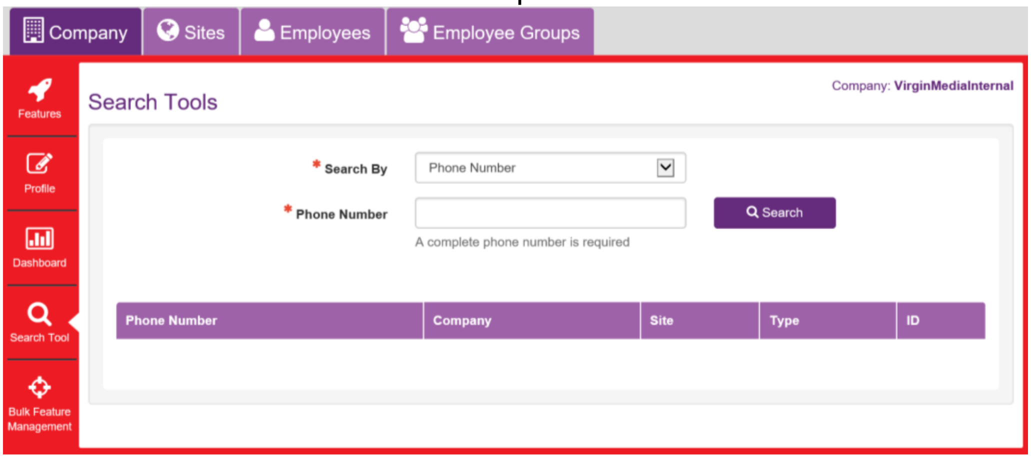
Username	First Name	Surname	Phone Number	Extension
companyadmin	Company	Admin	01228506232	6232

- Selecting the hyperlink in the **Username** column will take you to **the Employee Service Settings** page.
- Please note, if you perform a search and a match is found, but it is within a Company you do not have permission to view, you will get a message stating you do not have permission. This occurs because the search is performed platform wide.

Search by Telephone Number

If you want to locate a specific telephone number to see which Site, Enhanced Group Function (EGF) (Hunt group etc) or User it belongs to, you can perform a companywide telephone number search.

- Select **Phone Number** from the **Search By** parameter.
- Input the phone number into the **Phone Number** field, which will accept E164 format (+44xx) or national format (0203xx).
- Select the **Search** button to perform the search

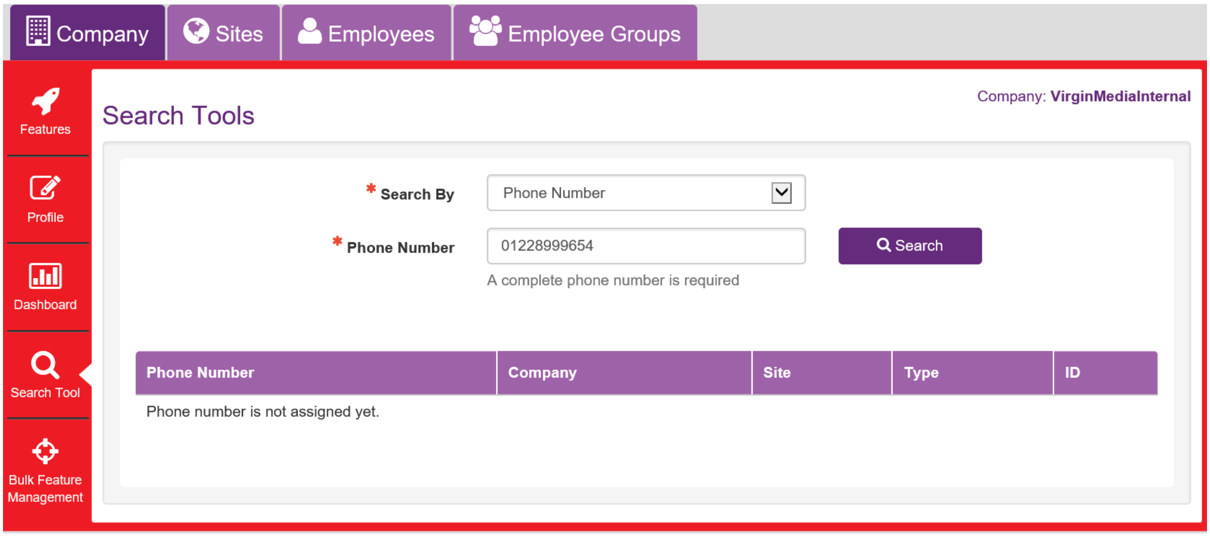


- If the telephone number is found it will return a table similar to the one below, listing the Company and Site that it is allocated to as well as if it allocated to a user or EGF. If the device is allocated to a user the Type column will be populated with the term User. If it allocated to a Hunt Group or similar group function then the Type column will be populated with the term EGF.

Phone Number	Company	Site	Type	ID
+44 1234 567891	VirginMediaInternal	TrialHook1	User	01234567891

- Selecting the hyperlink in the **ID** column will take you to **the Employee Service Settings** page.

- Please note, if you perform a search and a match is found, but the number is not assigned to an EGF or User, you will get a message stating that.

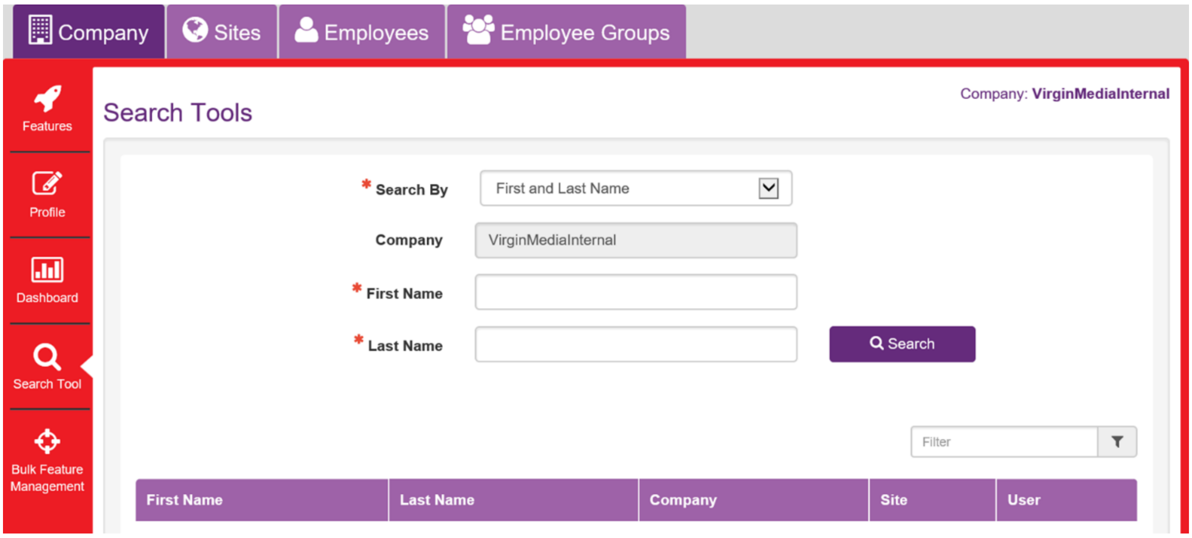


- Please note, if you perform a search and a match is found, but it is within a Company you do not have permission to view, you will get a message stating you do not have permission. This occurs because the search is performed platform wide.

Search by Name

If you want to locate a specific user by name to see which Site they belong to, or even which telephone number they have, you can perform a companywide name search.

- Select **First and Last Name** from the **Search By** parameter.
- Input the First Name into the **First Name** field and Last Name into the **Last Name** field, which will support wildcard searches. The Company field is optional and will limit the search to the company specified.
- Select the **Search** button to perform the search



- If the user is found it will return a table similar to the one below, listing the Company and Site that it is allocated to as well as the user's phone number which will appear as a hyperlink. The filter button is free text and will allow you to further refine your search.

First Name	Last Name	Company	Site	User
John	Smith	VirginMediaInternal	TrialHook1	01234567891

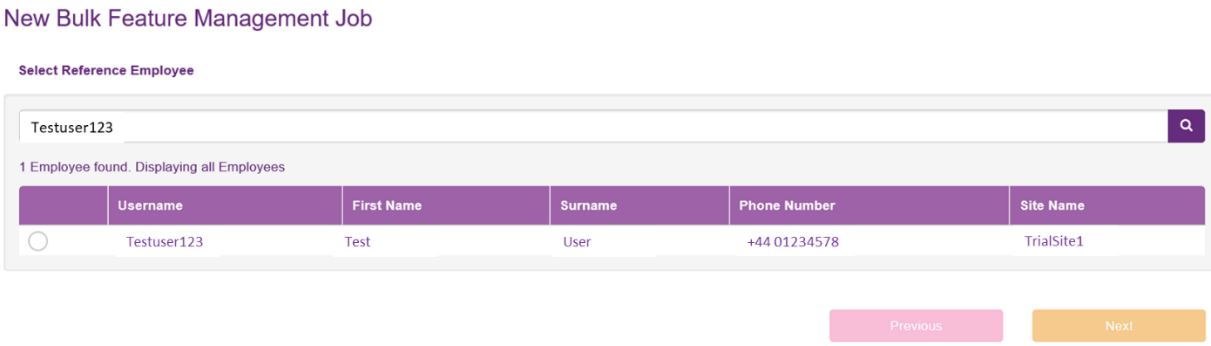
- Selecting the hyperlink in the **User** column will take you to **the Employee Service Settings** page.

Bulk Feature Management

Select this tab to duplicate feature settings from a reference Site or User to other target Sites and Users.

Once logged into the Business Portal you will see the Bulk Feature Management icon in the left-hand panel. Once you select **Bulk Feature Management** you will be taken to the next screen where you can start a new job or view any historical jobs.

To start a new job click on the **+Add** button which will then enable you to create a bulk mapping job for either Site or User (employee) features



Bulk Feature Management is supported on the following Site Features:

- Auto Attendant
- Add After Hours Greeting media, duplicate to all target Sites and enable.
- Add Business Hours Greeting media, duplicate to all target Sites and enable.

- **Call Centre**

Add Entrance Message media, duplicate to all target Sites and enable.

Add Comfort Message media, duplicate to all target Sites and enable.

Add On Hold Message media, duplicate to all target Sites and enable.

Add Overflow Message media, duplicate to all target Sites and enable.

- **Company Contacts**

Enable and duplicate contacts across all target Sites

- **Group Contacts**

Enable and duplicate contacts across all target Sites

- **Holiday Schedule**

Enable and duplicate schedule across all target Sites

- **Music on Hold File**

Add MoH media, duplicate to all target Sites and enable.

- **Music on Hold Configuration**

Enable and duplicate settings across all target Sites

- **Phone Services**

Enable and duplicate across all target Sites

- **Time Schedule**

Enable and duplicate schedule across all target Sites

Bulk Feature Management is supported on the following User Features:

- **Call Forwarding**

Enable and duplicate settings across all target Users.

- **Phone Services**

Enable and duplicate across all target Users

- **Pre-Alerting Announcement**

Add custom media, duplicate to all target Users and enable.

- **Pre-Alerting Configuration**

Enable and duplicate settings across all target Users

- **Voicemail Audio File**

Add custom media, duplicate to all target Users and enable.

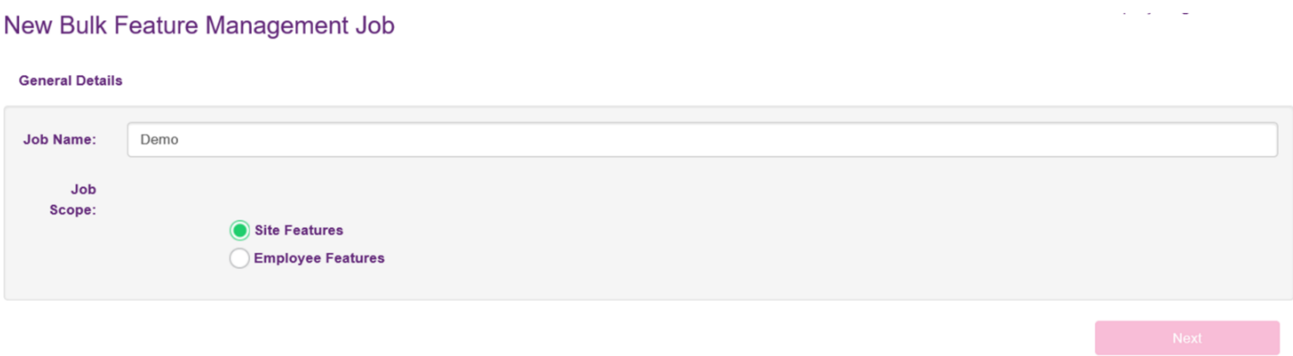
- **Voicemail Configuration**

Enable and duplicate settings across all target Users

- **Voicemail Configuration**

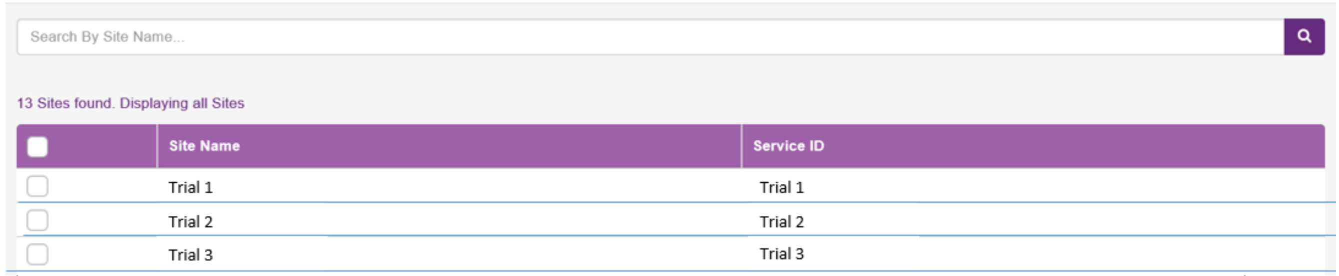
Enable and duplicate settings across all target Users

Insert a name for the job and select the **Site** radio button.



The next step is to select a reference Site that you want to copy features from. Type in the name followed by the search magnifying glass, or to search all simply select the green magnifying glass button.

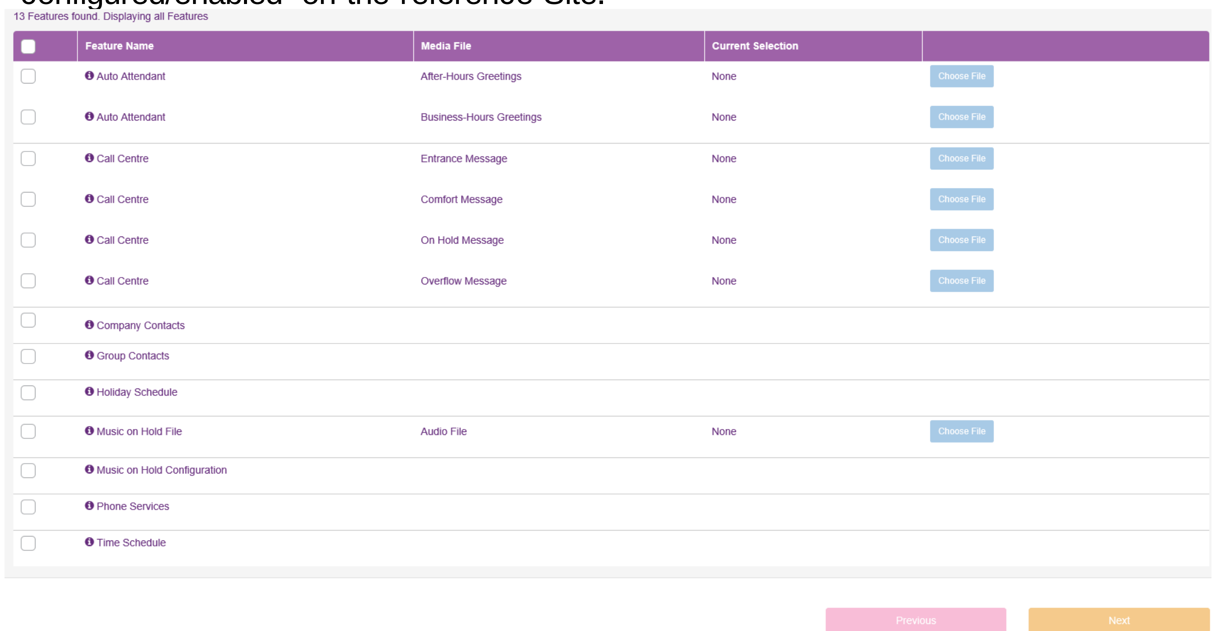
Select the radio button next to the reference Site followed by the **Next** button.



Select single or multiple target Sites that you want to copy features to. Type in the name followed by the search magnifying glass, or to search all simply select the green magnifying glass button.

Select the radio button/s next to the reference Site/s followed by the **Next** button.

The page will then present you with all of the available features that can be used as part of Site Bulk Feature Management. Please note it will only show features that have been configured/enabled on the reference Site.



Configure the features as needed, described further down in this document, then when you are ready simply click the **Next** button at the bottom of the page. The information icon next to each feature name provides more information on what can be configured.

You will then be presented with a summary page. Click on **Submit** to start the job.

You will then be returned to the main page where you will see the job with a status of **Not Started.**

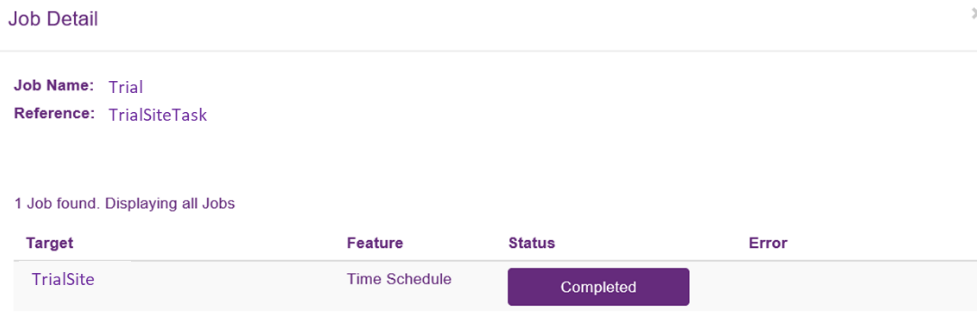
Once complete successfully the status will change to **Completed**.

Selecting the **Job Name** hyperlink will provide you with a modal showing you the status of each of the setting changes.

Throughout the process the status's you may see are as follows:

- Not Started
- In Progress
- Completed
- Error

When a job errors it does not mean the job has necessarily failed, it could be that these mappings already exist. Select the **Job Name** hyperlink to review the modal.



In this example you can see that certain elements already existed or the names were the same so the job did not attempt to overwrite these.

Job Detail

Job Name: Corporate HG Site Settings
Reference: FIRSTSITE

6 Jobs found. Displaying all Jobs

Target	Feature	Status	Error
SECONDSITE	Holiday Schedule	Completed	Holiday Schedule National Holiday Ratcliffe already exists in the target site
SECONDSITE	Company Contacts	Completed	
SECONDSITE	Group Contacts	Error	Group Contact John already exists in the target site
SixthSite	Holiday Schedule	Error	Holiday Schedule National Holiday Ratcliffe already exists in the target site
SixthSite	Company Contacts	Completed	
SixthSite	Group Contacts	Completed	

You can clear a job at any time by selecting the radio button next to the job, followed by delete. Please note this simply removes the reference to the job from here and does not back the settings out.

Mapping Custom Audio to Group Features

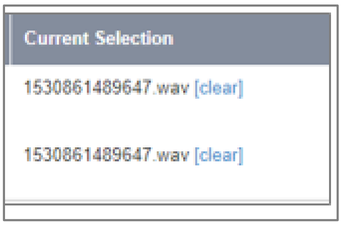
To upload custom audio files to the following supported features, select the radio button against each item.

13 Features found. Displaying all Features

	Feature Name	Media File	Current Selection	
☑	Auto Attendant	After-Hours Greetings	None	Choose File
☑	Auto Attendant	Business-Hours Greetings	None	Choose File
☑	Call Centre	Entrance Message	None	Choose File
☑	Call Centre	Comfort Message	None	Choose File
☑	Call Centre	On Hold Message	None	Choose File
☑	Call Centre	Overflow Message	None	Choose File
☐	Company Contacts			
☐	Group Contacts			
☐	Holiday Schedule			
☑	Music on Hold File	Audio File	None	Choose File

Select the **Choose File** button which will open up a new window allowing you to select a local audio file but don't forget the file standard must match the supported type, as detailed in the Site Features guide.

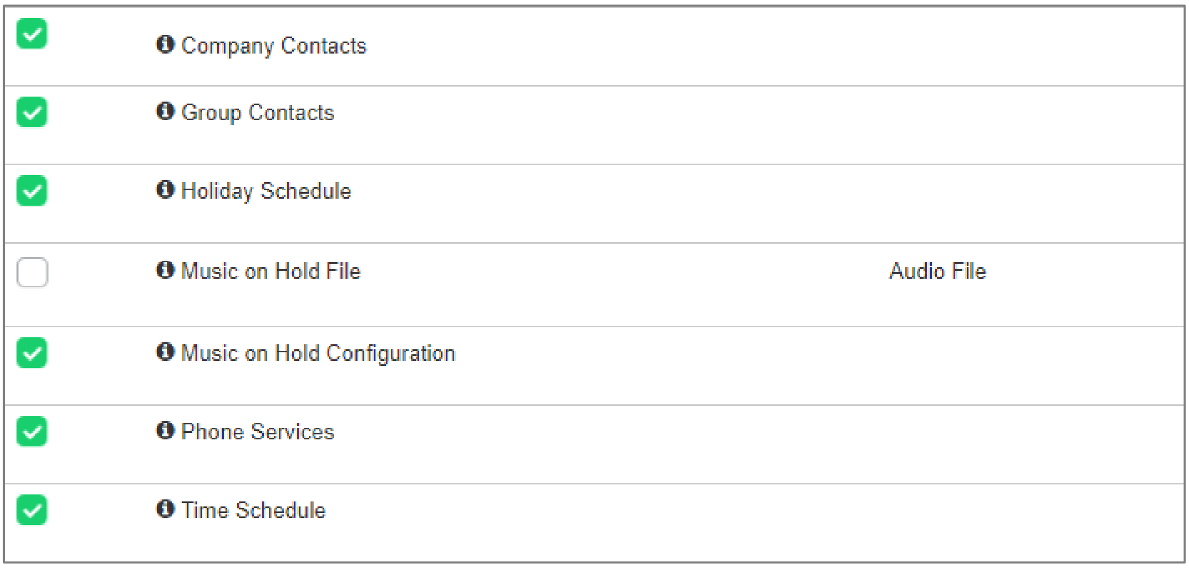
Once uploaded, the Current Selection parameter will show the file. If this is not correct you can select the **[clear]** button to remove this.



If you have other features to configure then carry on, if not select the **Next** button at the bottom of the page to complete the job. Please note Auto Attendants and Call Centers require the feature to be enabled and configured on both the reference Site and the Target site as here we are simply copying audio files to them. If they are not enabled at the Site you will see an error message.

Mapping Feature Settings

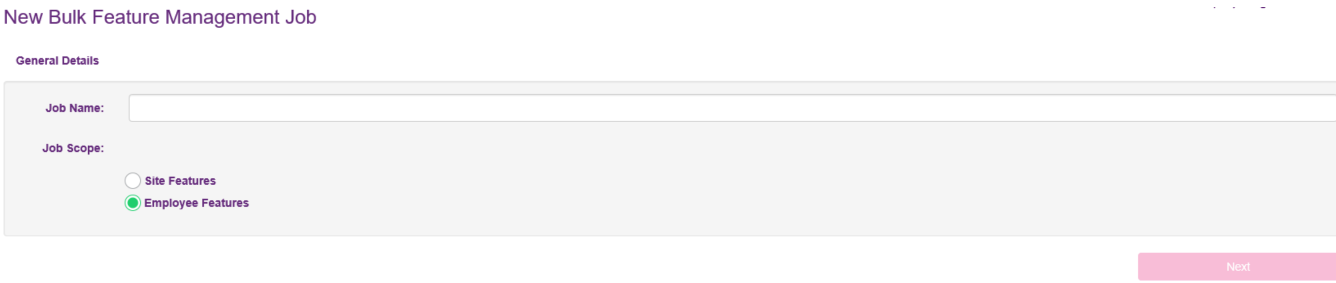
To copy other supported feature settings from one Site to another, select the radio button/s. This will copy all settings from the reference Site to the target Site/s for any of the following supported features:



If you have other features to configure then carry on, if not select the **Next** button at the bottom of the page to complete the job.

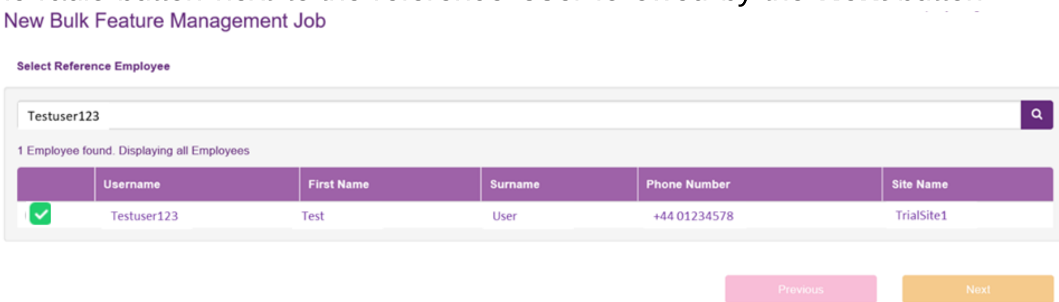
Bulk Feature Management – User Features

Insert a name for the job and select the **Employee** radio button.

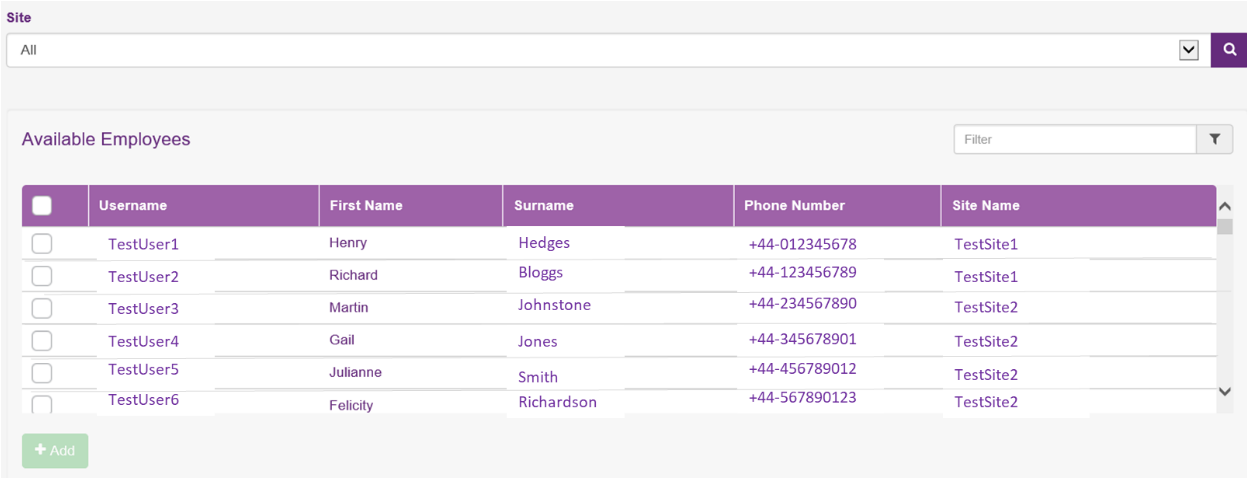


The next step is to select a reference User that you want to copy features from. Type in the name followed by the search magnifying glass, or to search all simply select the green magnifying glass button. Please note 'search all' is limited to 10 users only, if there are more it will not return any results.

Select the radio button next to the reference User followed by the **Next** button.



This page will show all Users across all Sites, but can be filtered by Site using the dropdown or typing into the filter box. Select single or multiple target Users that you want to copy features to, followed by the **+Add** button

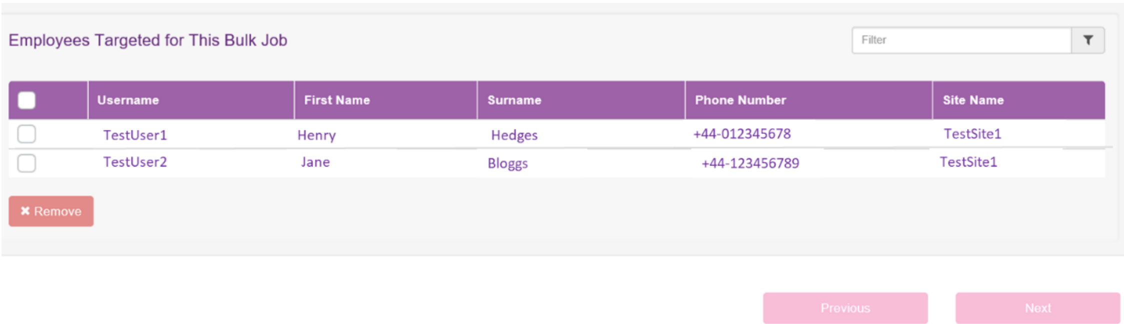

Site

All

Available Employees

	Username	First Name	Surname	Phone Number	Site Name
	TestUser1	Henry	Hedges	+44-012345678	TestSite1
	TestUser2	Richard	Bloggs	+44-123456789	TestSite1
	TestUser3	Martin	Johnstone	+44-234567890	TestSite2
	TestUser4	Gail	Jones	+44-345678901	TestSite2
	TestUser5	Julianne	Smith	+44-456789012	TestSite2
	TestUser6	Felicity	Richardson	+44-567890123	TestSite2

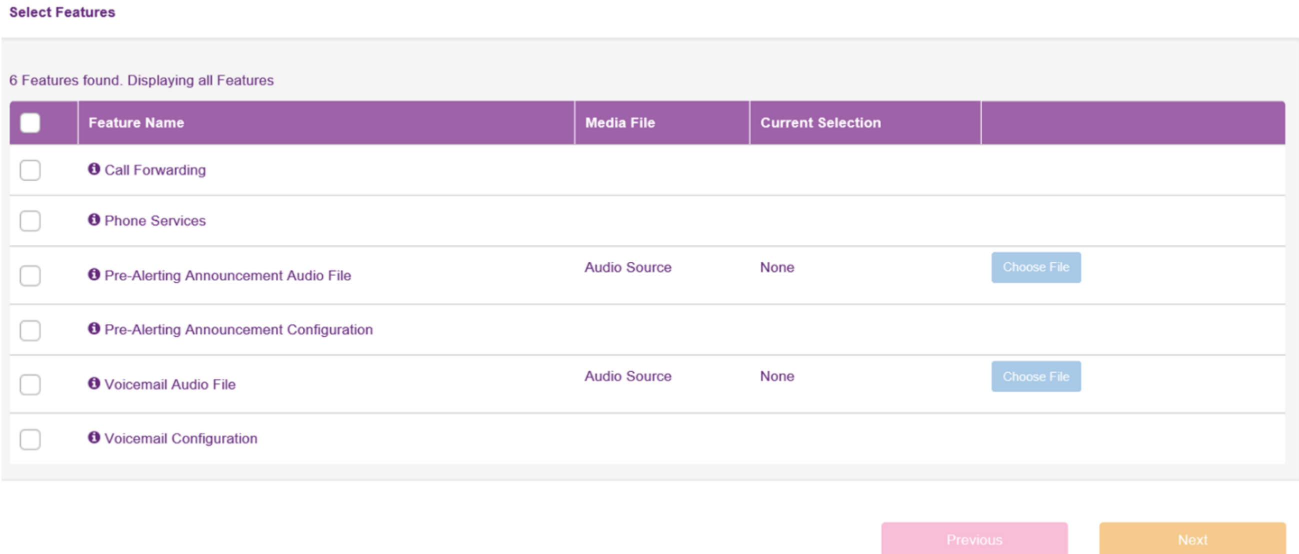
The target Users will then appear in the bottom box. If you have copied over any incorrectly, simply use the **Remove** button. If you are happy to proceed then select the **Next** button.


Employees Targeted for This Bulk Job

	Username	First Name	Surname	Phone Number	Site Name
	TestUser1	Henry	Hedges	+44-012345678	TestSite1
	TestUser2	Jane	Bloggs	+44-123456789	TestSite1

Select the radio button/s next to the reference User/s followed by the **Next** button.

The page will then present you with all of the available features that can be used as part of User Bulk Feature Management. Please note it will only show features that have been configured/enabled on the reference User.

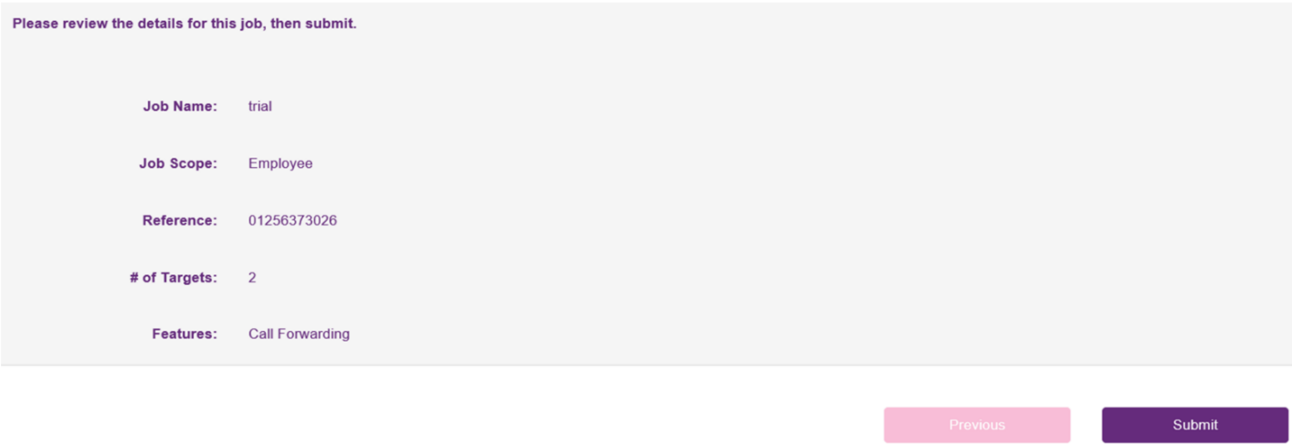

Select Features

6 Features found. Displaying all Features

	Feature Name	Media File	Current Selection	
	Call Forwarding			
	Phone Services			
	Pre-Alerting Announcement Audio File	Audio Source	None	Choose File
	Pre-Alerting Announcement Configuration			
	Voicemail Audio File	Audio Source	None	Choose File
	Voicemail Configuration			

Configure the features as needed, described further down in this document, then when you are ready simply click the **Next** button at the bottom of the page. The information icon next to each feature name provides more information on what can be configured.

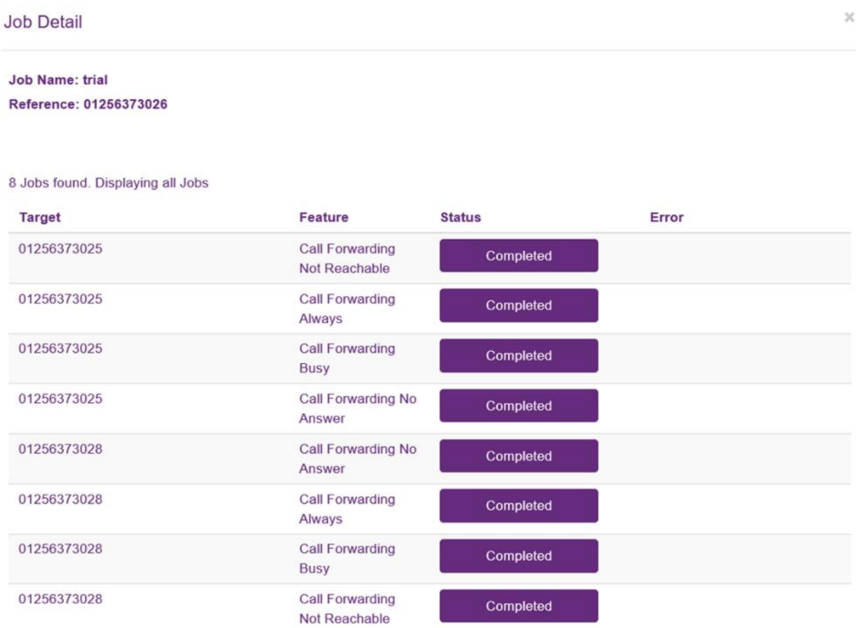
You will then be presented with a summary page. Click on **Submit** to start the job.



You will then be returned to the main page where you will see the job with a status of **Not Started.**

Once complete successfully the status will change to **Completed**.

Selecting the **Job Name** hyperlink will provide you with a modal showing you the status of each of the setting changes.



Job Detail

Job Name: trial
Reference: 01256373026

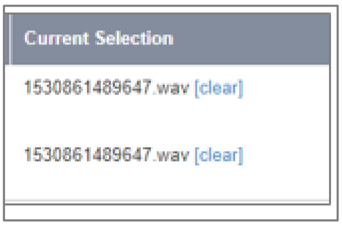
8 Jobs found. Displaying all Jobs

Target	Feature	Status	Error
01256373025	Call Forwarding Not Reachable	Completed	
01256373025	Call Forwarding Always	Completed	
01256373025	Call Forwarding Busy	Completed	
01256373025	Call Forwarding No Answer	Completed	
01256373028	Call Forwarding No Answer	Completed	
01256373028	Call Forwarding Always	Completed	
01256373028	Call Forwarding Busy	Completed	
01256373028	Call Forwarding Not Reachable	Completed	

Mapping Custom Audio to Users

To upload custom audio files to the following supported features, select the radio button against each item.

Select the **Choose File** button which will open up a new window allowing you to select a local audio file but don't forget the file standard must match the supported type, as detailed in the User Features guide.



Once uploaded, the Current Selection parameter will show the file. If this is not correct you can select the **[clear]** button to remove this.

If you have other features to configure then carry on, if not select the **Next** button at the bottom of the page to complete the job.

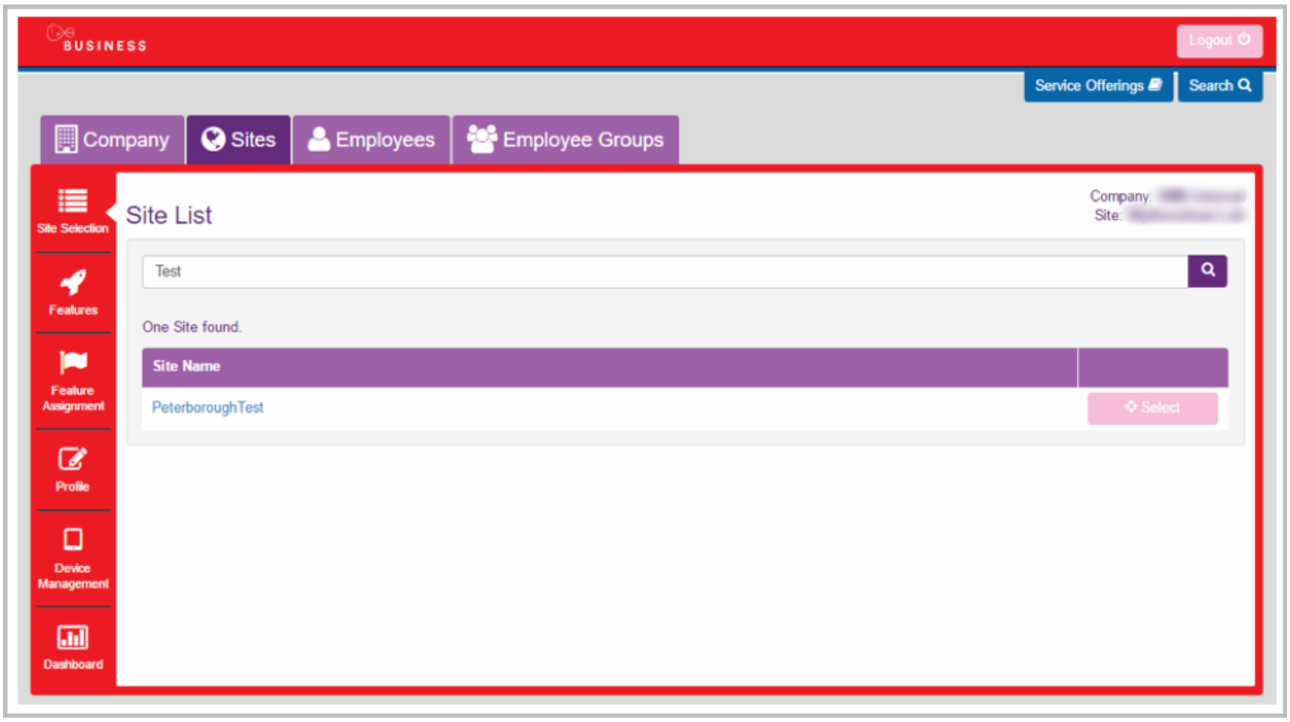
Mapping Feature Settings

To copy other supported feature settings from one User to another, select the radio button/s. This will copy all settings from the reference User to the target User/s for any of the supported features.

If you have other features to configure then carry on, if not select the **Next** button at the bottom of the page to complete the job.

Managing Sites

This allows the Company Administrator or Group Administrator to manage the Site Features, Site Profile and Devices, and view the Site Dashboard.



Sites Sidebar

When you select the Sites tab you will be presented with a left-hand side bar, which provides administrative functions for that Site, as per the screenshot

Site Selection – Search and select a Site to manage.

Features – Configure Site Features such as Hunt Groups, Music On Hold

Feature Assignment – Assign or disable Site Features that are included in the Site's Feature Package

Profile – The Site Profile lists all the details associated to the Site e.g. telephone number ranges, Call Capacity Groups, and Shared Devices etc.

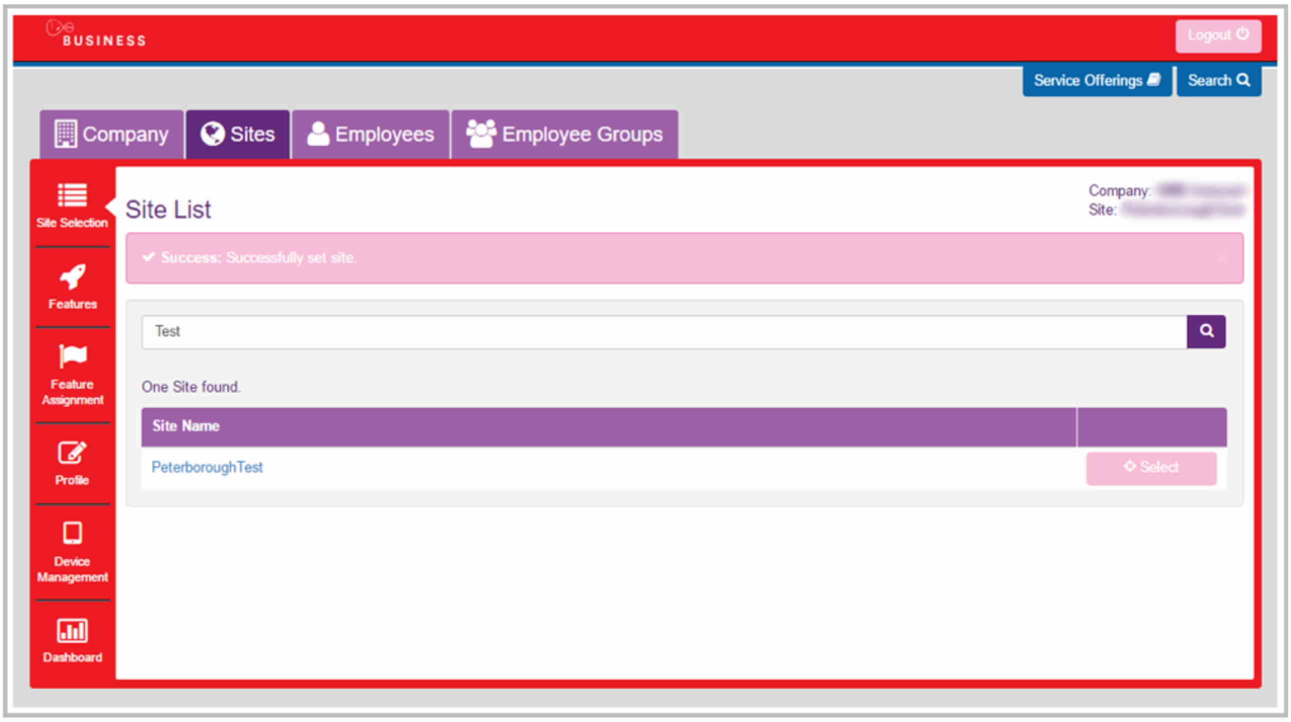
Devices Management – Add, modify and delete Devices and apply customisations

Dashboard – The Site Dashboard allows you to access Call Logging, Disaster Recovery features and a Site Feature Summary.

Site Selection

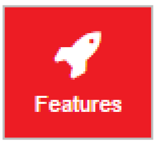
Select this tab to search, select and manage Sites:

You can search by Site name or simply hit the **Search** button to return a list of all Sites.



Features

Select this tab to configure Site features:



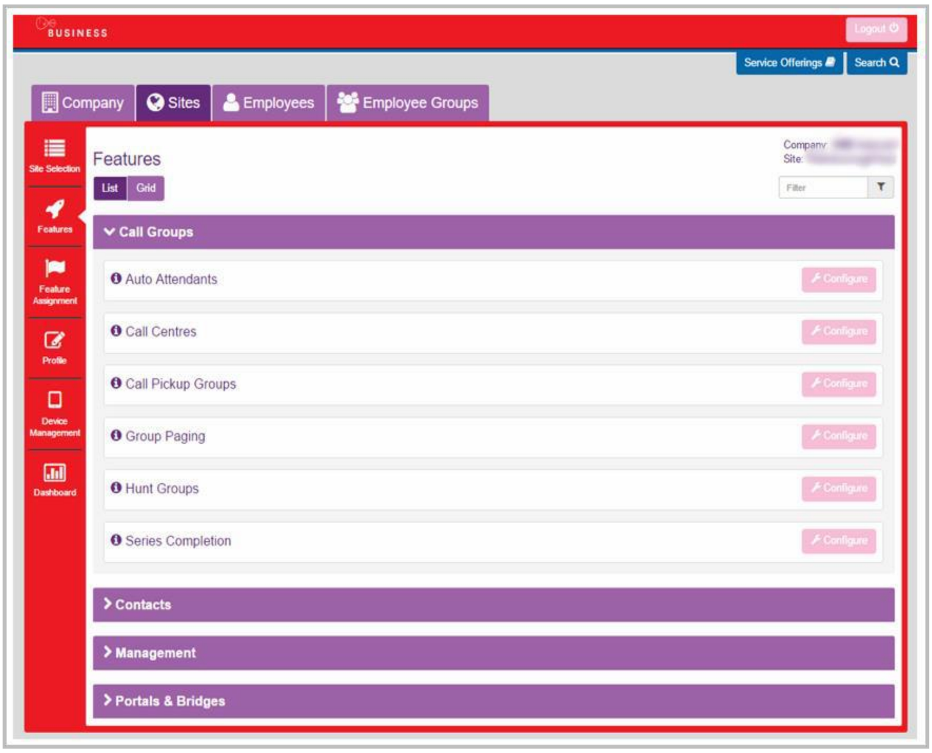
As a Company or Group Administrator, you can configure the features for a Site. Company Administrators can configure features for any Site within an entire Company. Group Administrators can only configure features for the individual Sites for which they have been granted administrative privileges. Site features are listed under the following categories and can be displayed as a List or a Grid:

- Call Groups – (e.g. Auto Attendants, Call Centres, and Hunt Groups)
- Contacts – (e.g. Company Contacts, Group Contacts, Phone Services)

- Management – (e.g. Call Capacity Management, Calling Plans, Group Calling Line ID)

- Portals & Bridges – (e.g. Call Director Portal, My Room Audio Conferencing Bridge and Voice Portal)

Click the **Configure** button next to the Site Feature that you wish to configure.



Feature Assignment

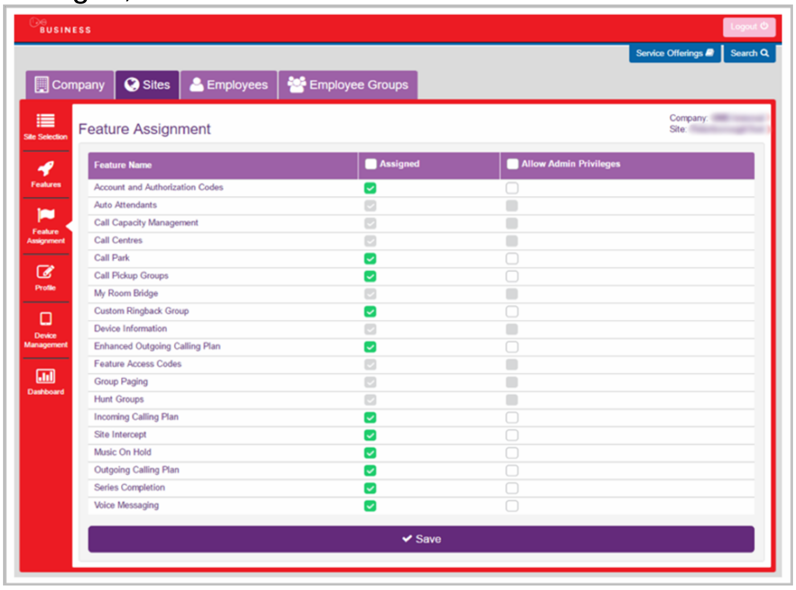
Select this tab to remove features from a Site:

As a Company Administrator or Group Administrator, you can use the Site Feature Assignment page to view the Site features that have been assigned to your Sites. You can also change these assignments, making features available or unavailable to individual Sites as required.

The changes you make to the feature assignments for a given Site apply to all Employees who use the service at that Site. For example, if you enable a specific feature, Employees at the Site can use it. If you disable a specific feature, it is not available for use by any Employees at the Site. Similarly, only features that are currently enabled can be configured using the Employee Feature Settings page. When you disable a feature, all corresponding configuration capabilities are also disabled. You can change a Site's feature assignments at any time.

If you are a Company Administrator, you can view and edit feature assignments for any of your Company's Sites. If you are a Group Administrator, you can only view and edit feature assignments if you have been granted administrative privileges for a Group that is being used to represent one of your Company's Sites.

To assign or remove features, or to permit or deny a Group Administrator the right to make changes, select or clear the check boxes in the **Allow Admin Privileges** list:

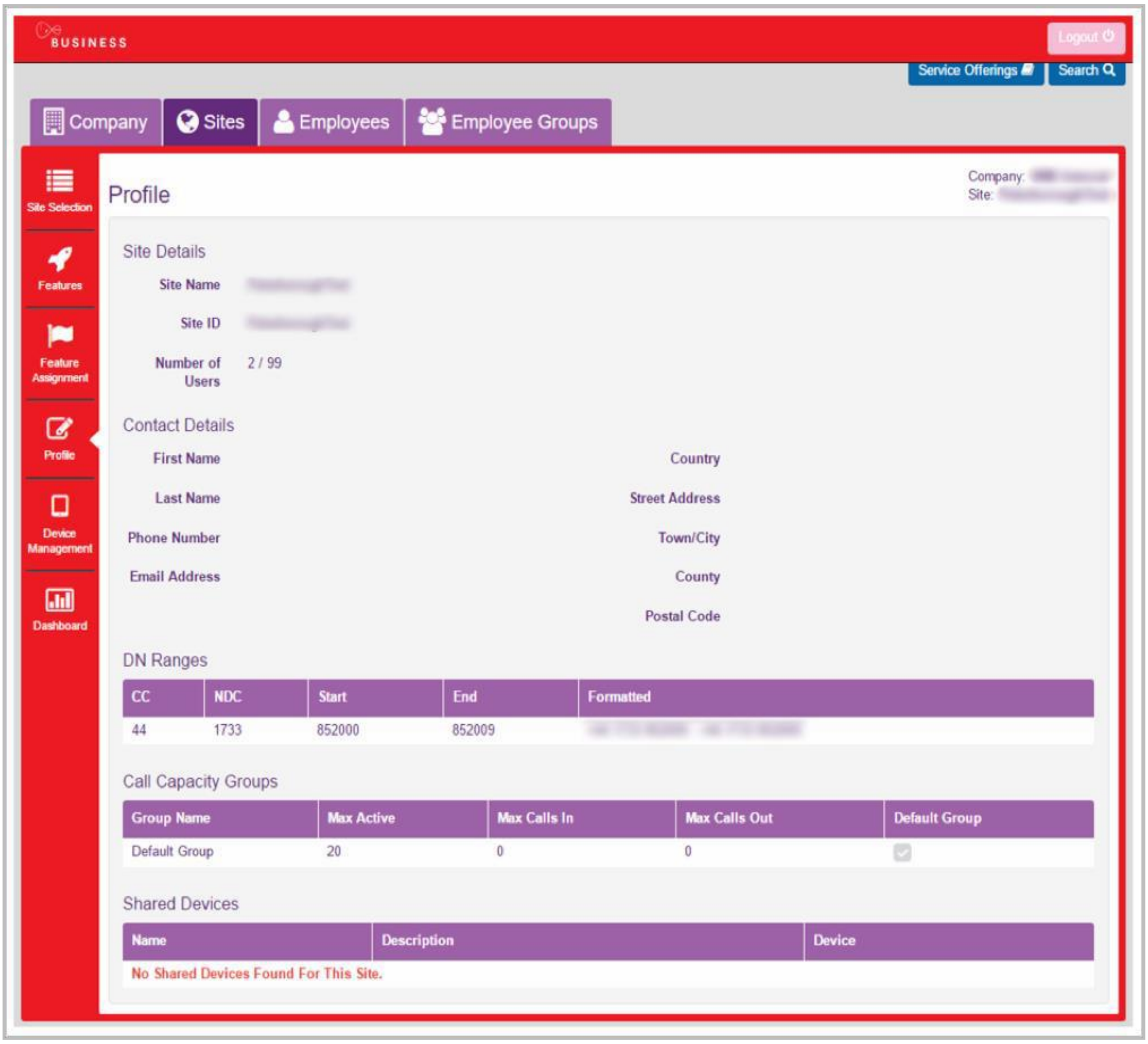


Profile

Select this tab to see a profile of the Site:

The Site Profile is informational and consists of the following:

- Site details (e.g. Number of Users, address and contact details)
- DN Ranges (telephone number(s) associated with the Site)
- Call Capacity Groups


BUSINESS
Logout
Service Offerings
Search
Company
Sites
Employees
Employee Groups
Site Selection
Features
Feature Assignment
Profile
Device Management
Dashboard
Profile
Company:
Site:
Site Details
Site Name
Site ID
Number of Users
2 / 99
Contact Details
First Name
Last Name
Phone Number
Email Address
Country
Street Address
Town/City
County
Postal Code
DN Ranges
CC
NDC
Start
End
Formatted
44
1733
852000
852009
Call Capacity Groups
Group Name
Max Active
Max Calls In
Max Calls Out
Default Group
Default Group
20
0
0
Shared Devices
Name
Description
Device
No Shared Devices Found For This Site.

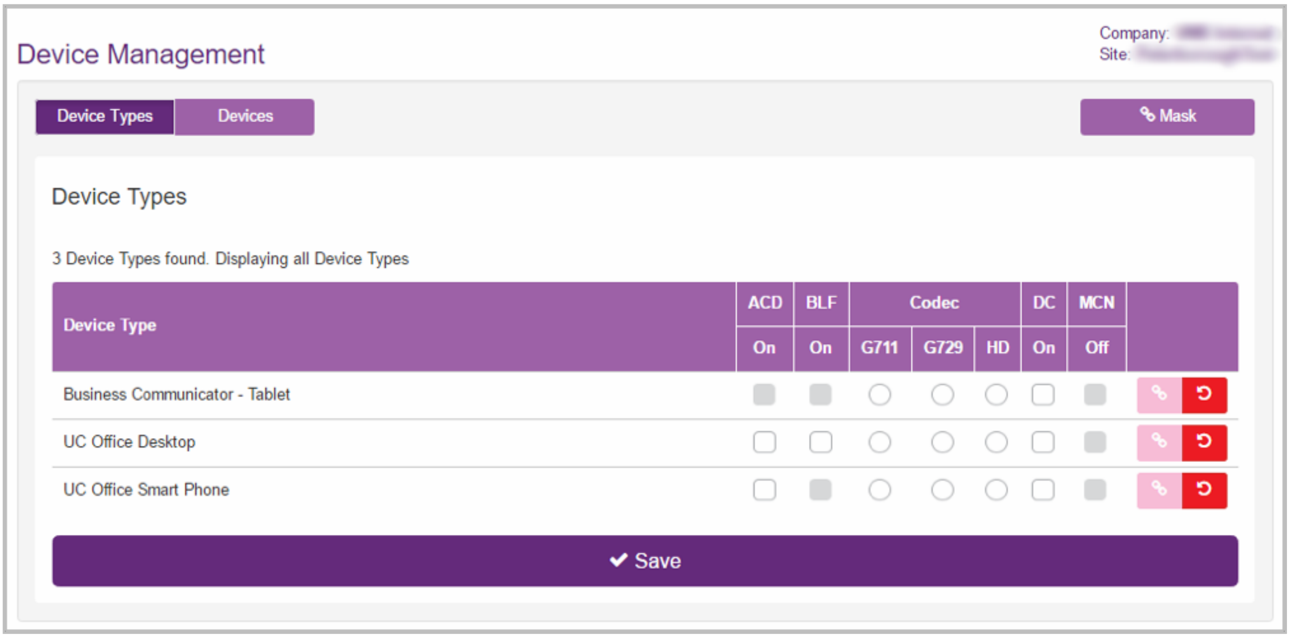
Device Management

Select this tab to manage devices and profiles:

The Device Management feature allows you to create, modify, and delete the devices (IP phones and/or Analogue Terminal Adaptors ATAs) that are used within a given Site. As an Administrator, you can also see a list all of the devices that are currently in use within a Site, or search for specific devices by device name, device type or available ports.

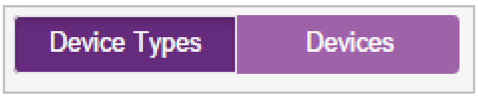
The Devices Employee feature associates a set of devices with an Employee (called “alternative locations” or “shared call appearances”). The **Device Management** Site Feature serves as a device inventory and provides functionality to manage and customise devices.

Devices are listed as Device Types – type of devices associated to the Site – and Devices – list of all devices under the Site.



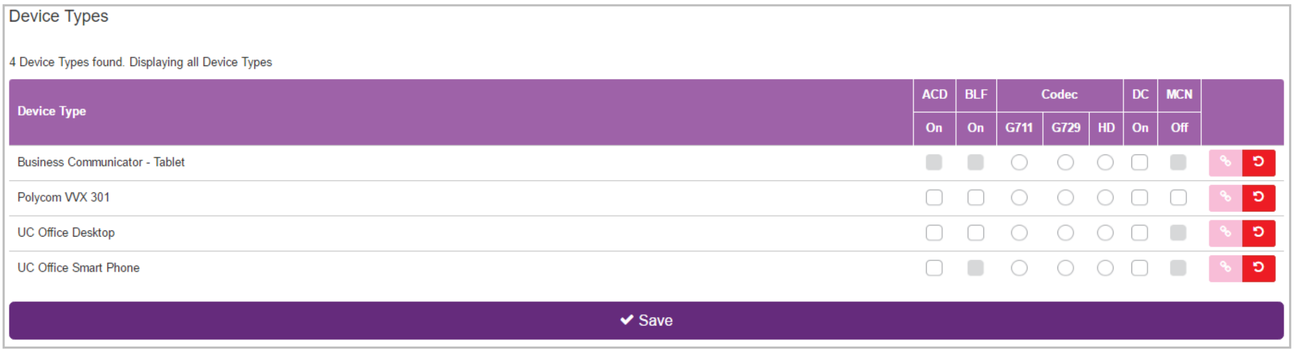
Device Types

The **Device Types** tab allows you to view, manage and apply customisations to all devices of a particular type (manufacturer and model) that are provisioned under the Site.



Only the customisations and their options that are available to the Device Type are displayed. Customisations that are not applicable are greyed out.

In order to customise all devices under the Site of certain types you simply choose from the customisation options and click **Save**. The device configuration files will be automatically rebuilt for all devices. When the devices are resynchronised (e.g. on reboot) with the configuration provisioning servers, the new customisations will be applied to the device(s).



For example:

The following table explains the available options, note, some options are only available if they have been purchased as an add-on as part of your Agreement:

Customisation	Option	Purpose
ACD *When purchased as an add-on*		To apply Call Centre Agent ACD State soft keys to the device that allow Call Centre Agents to Sign In/Out of Call Centres that they are assigned to and set their ACD state e.g. Available, Wrap-Up and Unavailable.
ACD *When purchased as an add-on*	On (tick check box)	This applies a configuration that will enable additional soft keys on the device for the Call Centre Agent to set their Call Centre ACD state.
ACD *When purchased as an add-on*	Off (default)	This applies a configuration that does not include the additional ACD soft keys for Users who are not Call Centre Agents or who do not wish to use this functionality.
BLF *When purchased as an add-on*		To apply Busy Lamp Field feature integration with devices. When this option is enabled, the SIP transport is changed from UDP to TCP to ensure that the complete and larger BLF signalling is communicated successfully. You are advised to contact your Network Administrator before making any changes to this customisation.

BLF *When purchased as an add-on*	On (tick check box)	This applies Busy Lamp Field feature integration with the device and changes the signalling transport.
BLF *When purchased as an add-on*	Off (default)	Leave this option off or set to off when Busy Lamp Field integration is not required.
Codec		To apply a particular voice codec that may offer better quality or less bandwidth consumption. Leave blank or click reset to use the default (typically applies G711 preference). You are advised to contact your Network Administrator before making any changes to this customisation.
Codec	G711	This applies a G711a/u codec preference.
Codec	G729	This applies only the G729 codec to ensure that a lower bandwidth is consumed at the cost of voice quality.
Codec	HD	This applies the G722 HD Voice codec. It consumes the same bandwidth as G711 and can offer a more realistic voice quality.
DC		This applies a configuration to the device that allows it to operate and communicate with the platform over a private Direct Connection deployment, e.g. a MPLS deployment that privately connects with the platform rather than via an Internet breakout point. You are advised to contact your Network Administrator before making any changes to this customisation.
DC	Off	This applies a standard deployment option when the device communicates with the platform via normal access methods over the Internet and not a Direct Connect deployment. Setting this to Off for a Device Type that is DC-enabled by default overrides the default and applies a configuration that is designed for communication over the Internet rather than the private access method.
DC	On	This applies a configuration to the device that is designed for deployments where the device will operate over a private Direct Connection deployment.
MCN		To disable Missed Call Notifications on the device.
MCN	Off (tick check box)	This disables Missed Call Notifications on the device.

MCN	On (default)	Leave the check box unticked for Missed Call Notifications to be enabled – the default behaviour.

Device Management also provides the option to create a configuration mask for customisations and apply this mask to multiple Device Types. This speeds up the application of the same customisations to multiple Device Types. Administrators select the mask options from the expandable Mask menu and then click the mask icon for each Device Type to apply the configuration.

Bulk Reboot

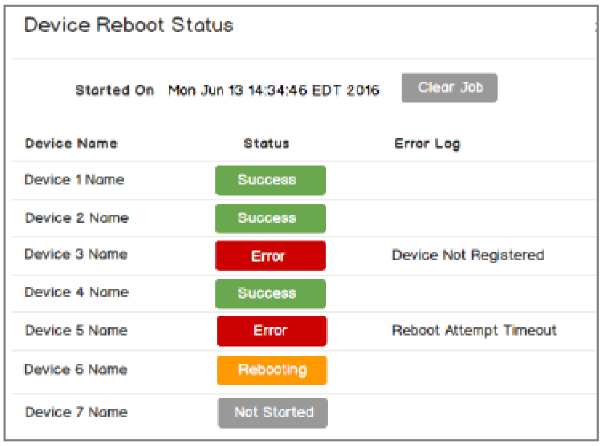
In order for the devices to take on their new configuration, you will need to reboot all of the device types using the reboot button:

Selecting this button will instruct the phones to reboot, but please note, any device that is unregistered will not be rebooted. When a device type reboot is initiated, the reboot icon that is normally displayed on the screen is replaced by a Reboot Status link until the reboot job is cleared, as per screenshot below.

When you click on the Reboot Status link, you are presented with a modal screen showing the date and time that the reboot was launched along with a list of device instances (at the time of reboot) of the specified type for the site, as per screenshot below. Manually refreshing the page will provide updates.

The following options may be seen:

- Success - Device has been rebooted successfully
- Error - There was an error while trying to reboot the device:
- Device not registered
- Reboot attempt timeout
- Internal Server Error
- Pending - Reboot command has been sent to the device
- Not Stared - Device has not been rebooted yet



Once the job has completed a refresh of the page will bring up the reboot button, providing all devices were successful. If they were not, you should select the **Clear Job** button to make the reboot button appear again for future use.

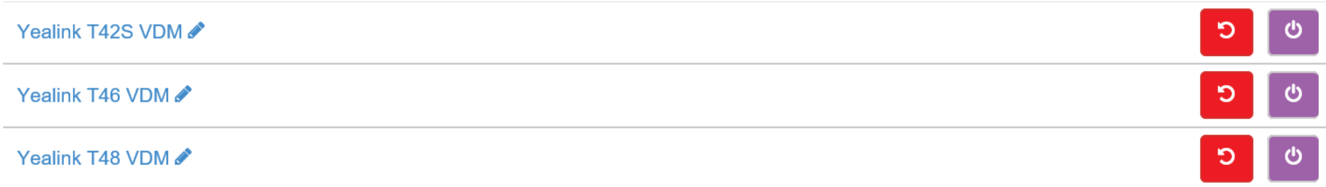
Bulk Reset

If the administrator has made lots of changes in error or simply wants to start again, then they can select the Reset option which will restore. Once selected you will need to arrange to reboot the devices in order for the phones to restore themselves, using the procedure outlined above. Resetting a Device Type would default the following settings:

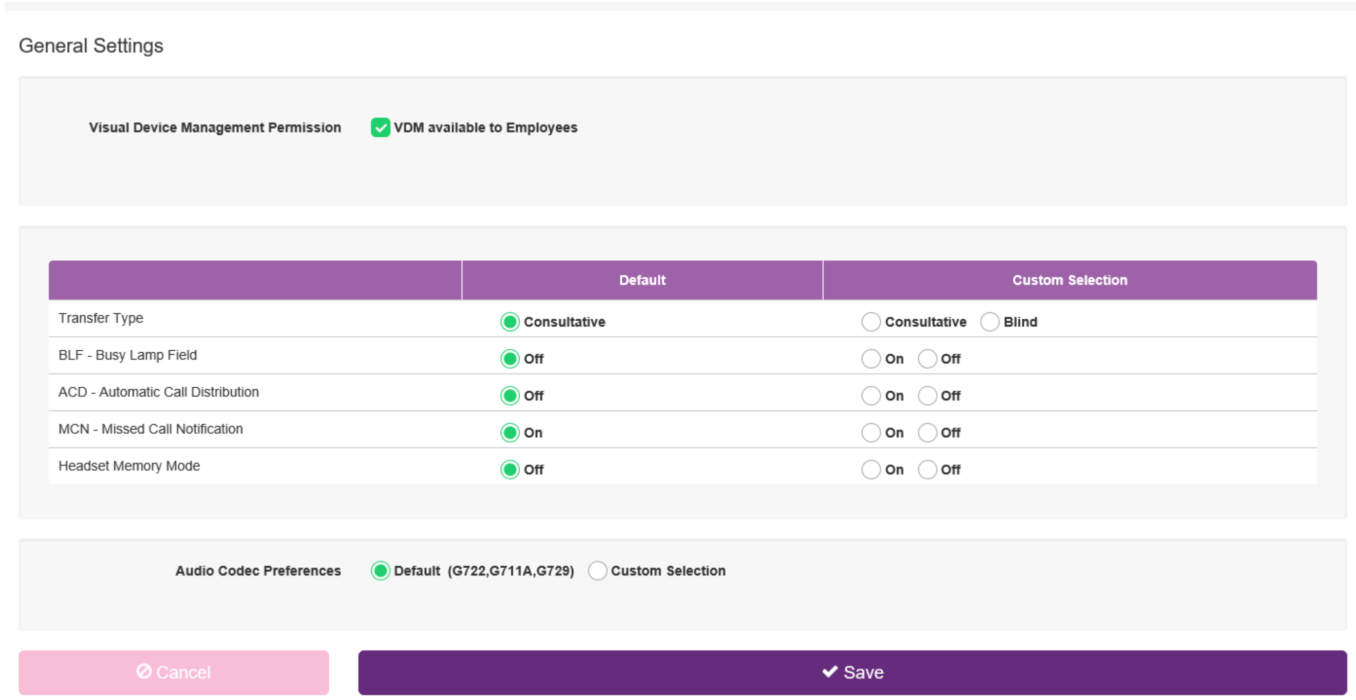
- ACD - Default is Off
- BLF – Busy Lamp Field - Default is Off
- Codecs - Default is G722, G711A, G729
- DC - Default is Off
- MCN - Default is On

Device Types - Advanced Customisation

If the device is using a VDM device type, capable of having advanced customisation, then the Device name will have the term VDM at the end of the name, will appear as a hyperlink and the basic configuration options will not appear on this front page, as shown below:



Simply click on the hyperlink and it will open up the following screen:



General Settings

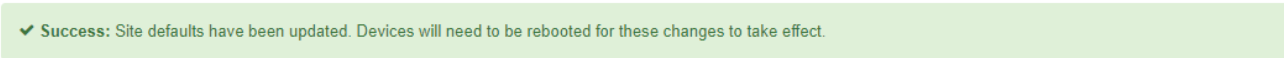
Company/Group Administrators can prevent Employees from using the **Configure** keys against VDM enabled devices. This will prevent these administration types from undertaking the following activity:

- Editing Line Keys
- Editing Soft Keys
- Editing Ringer Options

Restriction is done per Device Type per Site, individual Devices cannot be restricted. The following restriction option is then available:

- **VDM available to Employees** - Restrict End Users from accessing the VDM functionality by checking the available button.

Click on **Save** and you will be presented with the following message.



You can then customise these options for all devices under the Site:

- Transfer Type
- BLF – Busy Lamp Field (for supported devices only)
- ACD – Automatic Call Distribution
- MCN - Missed Call Notification
- Headset Memory Mode
- Audio Codecs
- Video Codecs (for supported devices only)

Again simply choose from the customisation options, click **Save** and arrange to reboot the devices. The following table explains the available options:

Customisation	Option	Purpose
Transfer Type		This will allow the administrator to determine whether Consultative or Blind Transfer is used by default for all transfer types.
Transfer Type	Consultative (Default)	If this enabled, then when the user selects the transfer button soft key during a call, once they have entered the number it will dial the party they are transferring to. The user can then consult with the party before handing over the call and putting the phone down.
Transfer Type	Blind	If this enabled, then when the user selects the transfer button soft key during a call it will transfer the call straight through with no consultation.
BLF		To apply Busy Lamp Field feature integration with devices. When this option is enabled the SIP transport is changed from UDP to TCP to ensure that the complete and larger BLF signalling is communicated successfully. You are advised to contact your Network Administrator before making any changes to this customisation.
BLF	On (tick check box)	This applies Busy Lamp Field feature integration with the device and changes the signalling transport.
BLF	Off (default)	Leave this option off or set to off when Busy Lamp Field integration is not required.
ACD		To apply Call Centre Agent ACD State soft keys to the device that allow Call Centre Agents to Sign In/Out of Call Centres that they are assigned to and set their ACD state e.g. Available, Wrap-Up, and Unavailable.
ACD	On (tick check box)	This applies a configuration that will enable additional soft keys on the device for the Call Centre Agent to set their Call Centre ACD state.
ACD	Off (default)	This applies a configuration that does not include the additional ACD soft keys for Users that are not a Call Centre Agent or who do not wish to use this functionality.
MCN		To disable Missed Call Notifications on the device use this option.
MCN	Off (tick check box)	This disables Missed Call Notifications on the device.
MCN	On (default)	Leave the check box unticked for Missed Call Notifications to be enabled – the default behaviour.
Headset Memory		Enabling this will configure this setting on the phone, saving the user from doing this locally. Headset memory mode instructs the phone to

		remember whether the user used the headset or the speakerphone for their last call. When the user then makes the next call it remembers to send the call to the headset if that was last used.
Headset Memory	On	This enables Headset Memory Mode.
Headset Memory	Off (default)	This disables Headset Memory Mode.
Audio Codec		To apply a particular voice codec to reduce bandwidth consumption. Leave blank or click reset to use the default (applies H264 preference). You are advised to contact your Network Administrator before making any changes to this customisation.
Codec	G711	This applies a G711 codec preference.
Codec	G729	This applies only the G729 codec to ensure that a lower bandwidth is consumed at the cost of voice quality.
Codec	G722	This applies the G722 HD Voice codec which is set by default. It consumes the same bandwidth as G711 and can offer a more realistic voice quality.
Video Codec		To apply a particular video codec to reduce bandwidth consumption. Leave blank or click reset to use the default (applies G722 preference). You are advised to contact your Network Administrator before making any changes to this customisation.
Codec	H264	This applies a H264 codec preference.
Codec	H263	This applies a H263 codec preference.

Devices

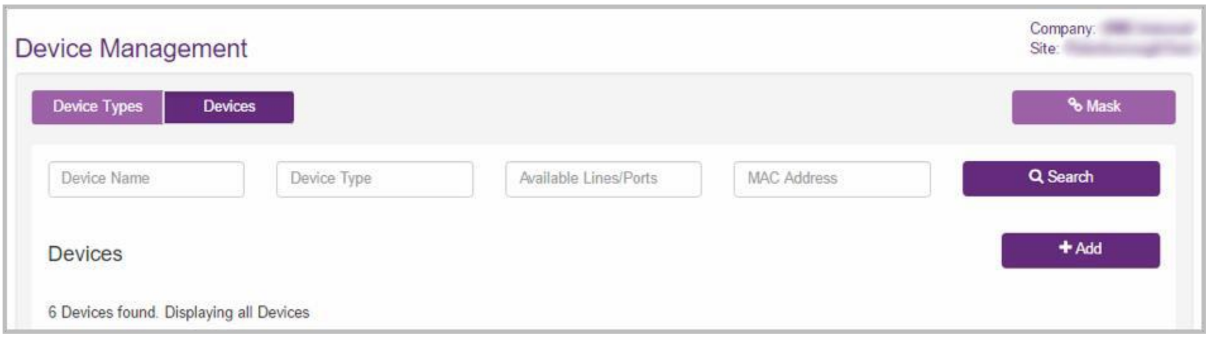
The **Devices** tab allows you to search, create, modify and delete devices and view, manage and apply customisations to a subset of devices or individual devices that are provisioned under the Site.

Only the customisations and their options that are available to the Device Type are displayed. Customisations that are not applicable are greyed out.

In order to customise individual devices you simply locate the device and then choose from the available customisation options, as per the table above, and click **Save**. If you can't find it then you can use the **Search** button to locate the device:

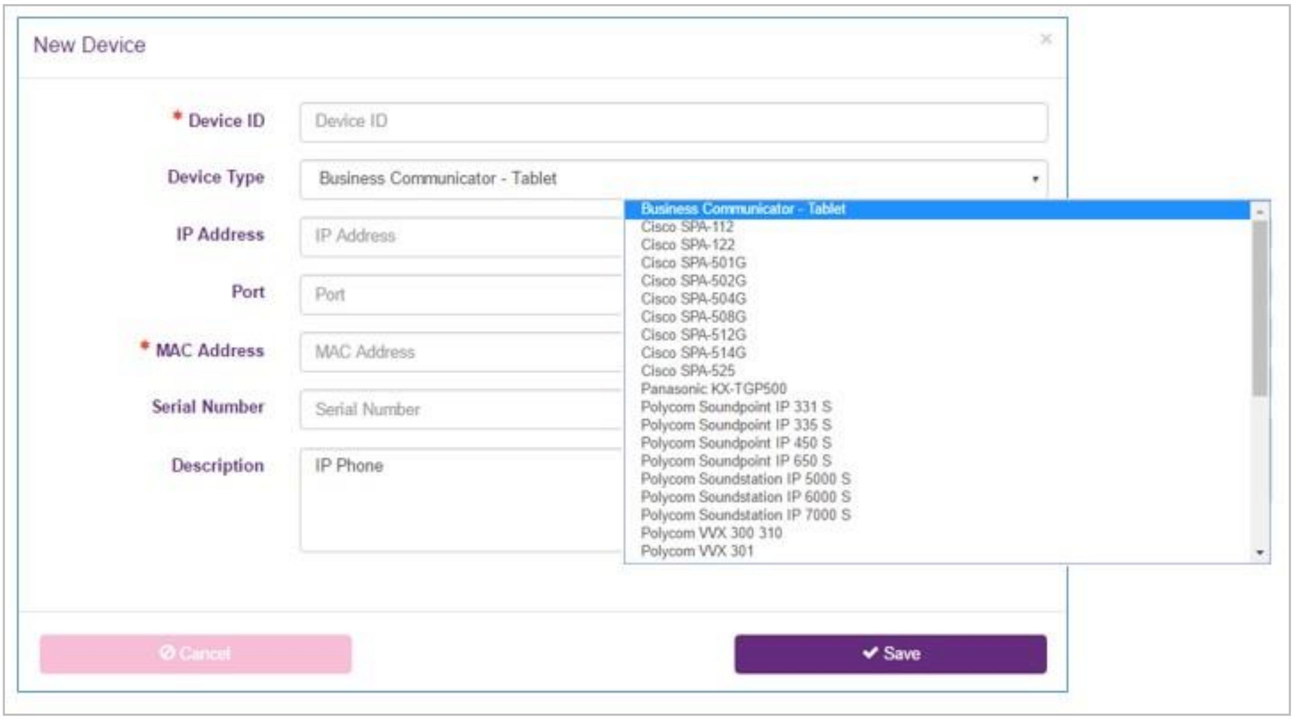
The device configuration file(s) will be automatically rebuilt. When the devices are resynchronised (e.g. on reboot) with the configuration provisioning servers the customisations will be applied to the device(s).

To add a new device click the **+Add** button underneath the Search button:



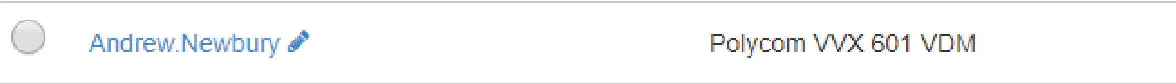
Then follow these steps:

1. Click **New** – The New Device page is displayed
2. Fill in the fields to configure the new device
3. New Device Fields:
    - Device ID – A unique identifier for the device
    - Device Type – The type (make and model) of device. Note the device must be on the list of approved handsets.
    - MAC Address – The MAC address of the device
4. Click **Save**



Devices – Advanced Customisation

If the device is using a VDM device type, capable of having advanced customisation, then the Device name will have the term VDM at the end of the name, similar to the one below.

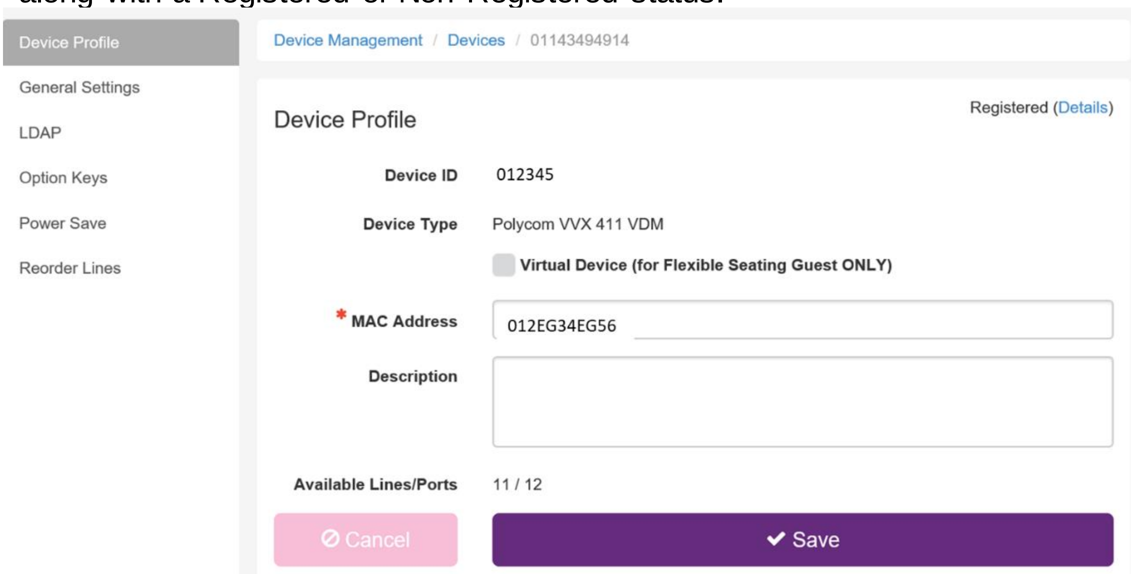


Simply click on a device which will open up the following options:

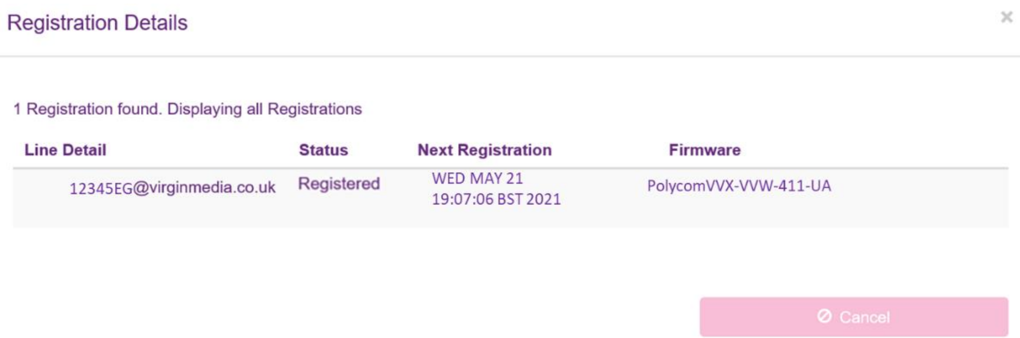
- **Device Profile** – this provides an overview of the device along with its registration status.
- **General Settings** – this enables you to customise a device, similar to the options available in the Basic Customisation section, but with a few additions.
- **LDAP –** if enabled then this will allow an LDAP directory to be accessed from the device.
- **Option Keys** – this enables you to set-up speed dials and function keys, including a customer function.
- **Power Save** – this enables you to customise when this function is in operation.
- **Reorder Lines** – this enables you to reorder Primary Line, Additional Line and Shared Call Appearance keys

Device Profile

Clicking on this option will open up the following screen displaying some basic information along with a Registered or Non Registered status.

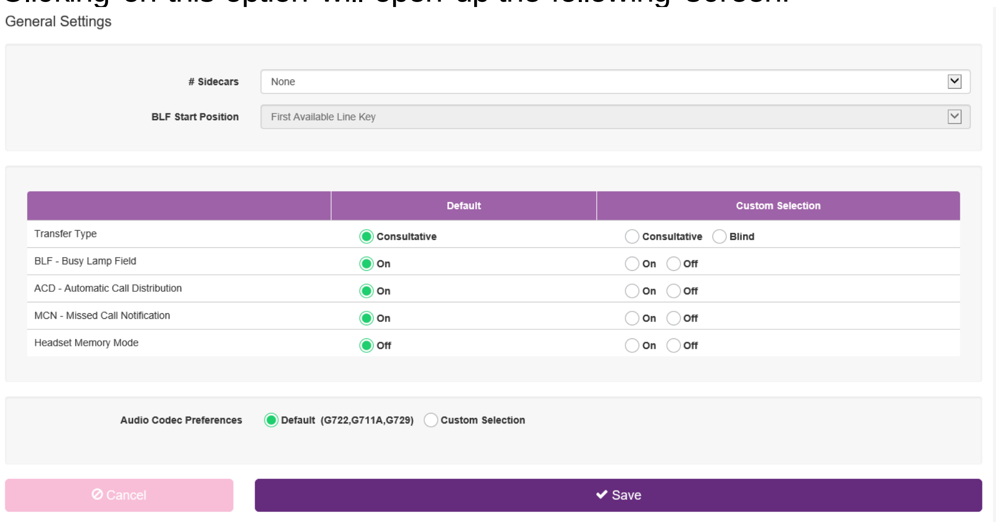


Clicking the **Details** button next to Registered will show the administrator all lines linked to the primary user, so additional lines and shared call appearances. Within this display modal you can also see the next registration attempt and what level of firmware the device is using.



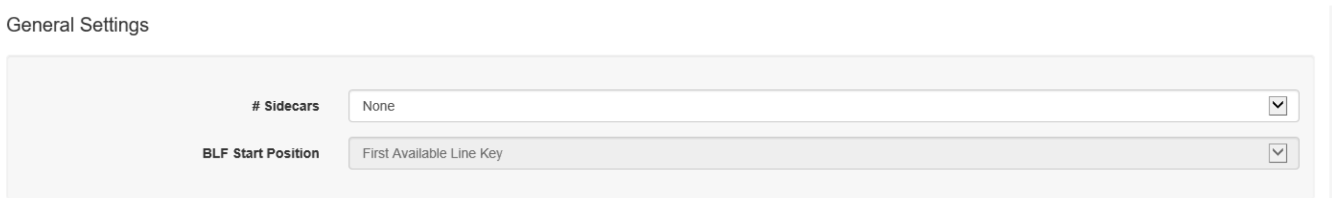
General Settings

Clicking on this option will open up the following screen:



You can customise the settings for IP Phone Sidecars:

- **# Sidecars –** Select the type and quantity of sidecar attachments that the device will be using.
- **BLF Start Position –** Select whether BLF keys will start on the phone first, using available line keys, or whether it will start on the sidecar first.



When you add a Sidecar a static image will also appear in the Business Portal, from page 4.

You can then use the sidecar to also add Line and Speed Dial keys, explained further on. If you want to use the Sidecar just for speed dials, and are not using BLF, simply ignore the **BLF Start Position** parameter.

Click on **Save** and you will be presented with the following message.

✔ **Success:** A device reboot is required for changes to take effect. You can do this now or, if you have other changes, make these first and then reboot.

If you have further changes to make then make these first. Otherwise go back to main screen, using the breadcrumb trail, and select the **Reboot** button. This will instruct the phone to power off and then back on, once it has powered on the settings will take effect.

You can then customise these options for this device:

- Transfer Type
- BLF – Busy Lamp Field (for supported devices only)
- ACD – Automatic Call Distribution
- MCN - Missed Call Notification
- Headset Memory Mode
- Audio Codecs
- Video Codecs (for supported devices only)

Again simply choose from the customisation options, click **Save** and arrange to reboot the device. The following table explains the available options:

Customisation	Option	Purpose
Transfer Type		This will allow the administrator to determine whether Consultative or Blind Transfer is used by default for all transfer types.
Transfer Type	Consultative (Default)	If this enabled, then when the user selects the transfer button soft key during a call, once they have entered the number it will dial the party you are transferring to. The user can then consult with the party before handing over the call and putting the phone down.
Transfer Type	Blind	If this enabled, then when the user selects the transfer button soft key during a call it will transfer the call straight through with no consultation.
BLF		To apply Busy Lamp Field feature integration with devices. When this option is enabled the SIP transport is changed from UDP to TCP to ensure that the complete and larger BLF signalling is communicated successfully. You are

		advised to contact your Network Administrator before making any changes to this customisation.
BLF	On (tick check box)	This applies Busy Lamp Field feature integration with the device and changes the signalling transport.
BLF	Off (default)	Leave this option off or set to off when Busy Lamp Field integration is not required.
ACD		To apply Call Centre Agent ACD State soft keys to the device that allow Call Centre Agents to Sign In/Out of Call Centres that they are assigned to and set their ACD state e.g. Available, Wrap-Up, and Unavailable.
ACD	On (tick check box)	This applies a configuration that will enable additional soft keys on the device for the Call Centre Agent to set their Call Centre ACD state.
ACD	Off (default)	This applies a configuration that does not include the additional ACD soft keys for Users that are not a Call Centre Agent or who do not wish to use this functionality.
MCN		To disable Missed Call Notifications on the device.
MCN	Off (tick check box)	This disables Missed Call Notifications on the device.
MCN	On (default)	Leave the check box unticked for Missed Call Notifications to be enabled – the default behaviour.
Headset Memory		Enabling this will configure this setting on the phone, saving the user from doing this locally. Headset memory mode instructs the phone to remember whether the user used the headset or the speakerphone for their last call. When the user then makes the next call it remembers to send the call to the headset if that was last used.
Headset Memory	On	This enables Headset Memory Mode.
Headset Memory	Off (default)	This disables Headset Memory Mode.
Audio Codec		To apply a particular voice codec to reduce bandwidth consumption. Leave blank or click reset to use the default (applies G722 preference). You are advised to contact your Network Administrator before making any changes to this customisation.
Codec	G711	This applies a G711 codec preference.
Codec	G729	This applies only the G729 codec to ensure that a lower bandwidth is consumed at the cost of voice quality.
Codec	G722	This applies the G722 HD Voice codec which is set by default. It consumes the same bandwidth as G711 and can

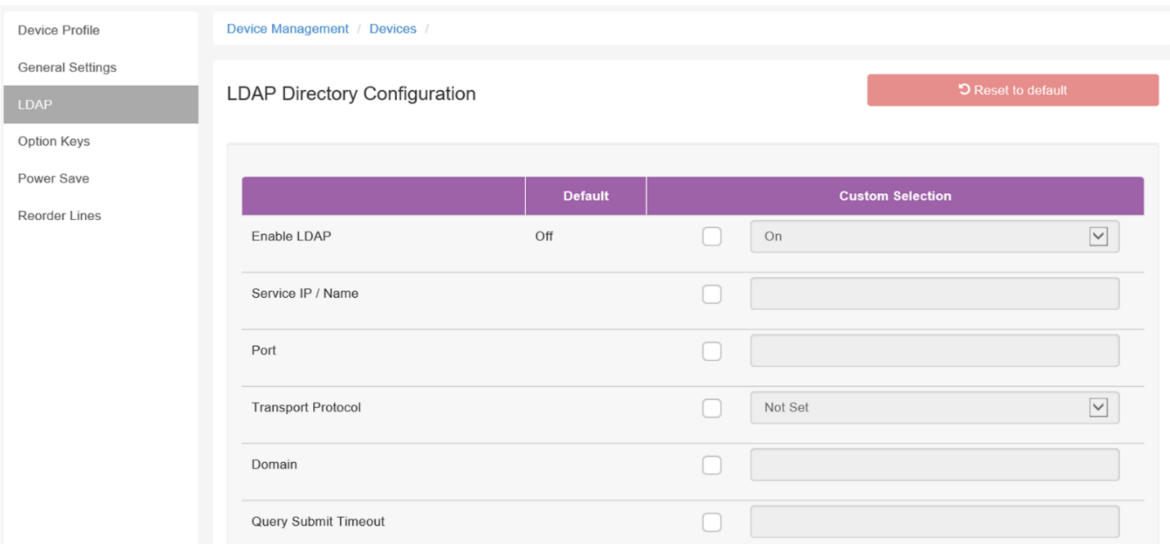
		offer a more realistic voice quality.
Video Codec		To apply a particular video codec to reduce bandwidth consumption. Leave blank or click reset to use the default (applies H264 preference). You are advised to contact your Network Administrator before making any changes to this customisation.
Codec	H264 (Default)	This applies a H264 codec preference.
Codec	H263	This applies a H263 codec preference.

LDAP

If your Service Provider has enabled it, then an LDAP option will also appear in the left-hand navigation menu. Clicking on this menu button will present the following screen allowing LDAP to be configured. These settings are then retained on our service, so in the event of a factory reset or reboot of the device, it will then download its settings again. The image below is a sample from a Polycom device, but please be aware the settings displayed for Yealink devices will be different.

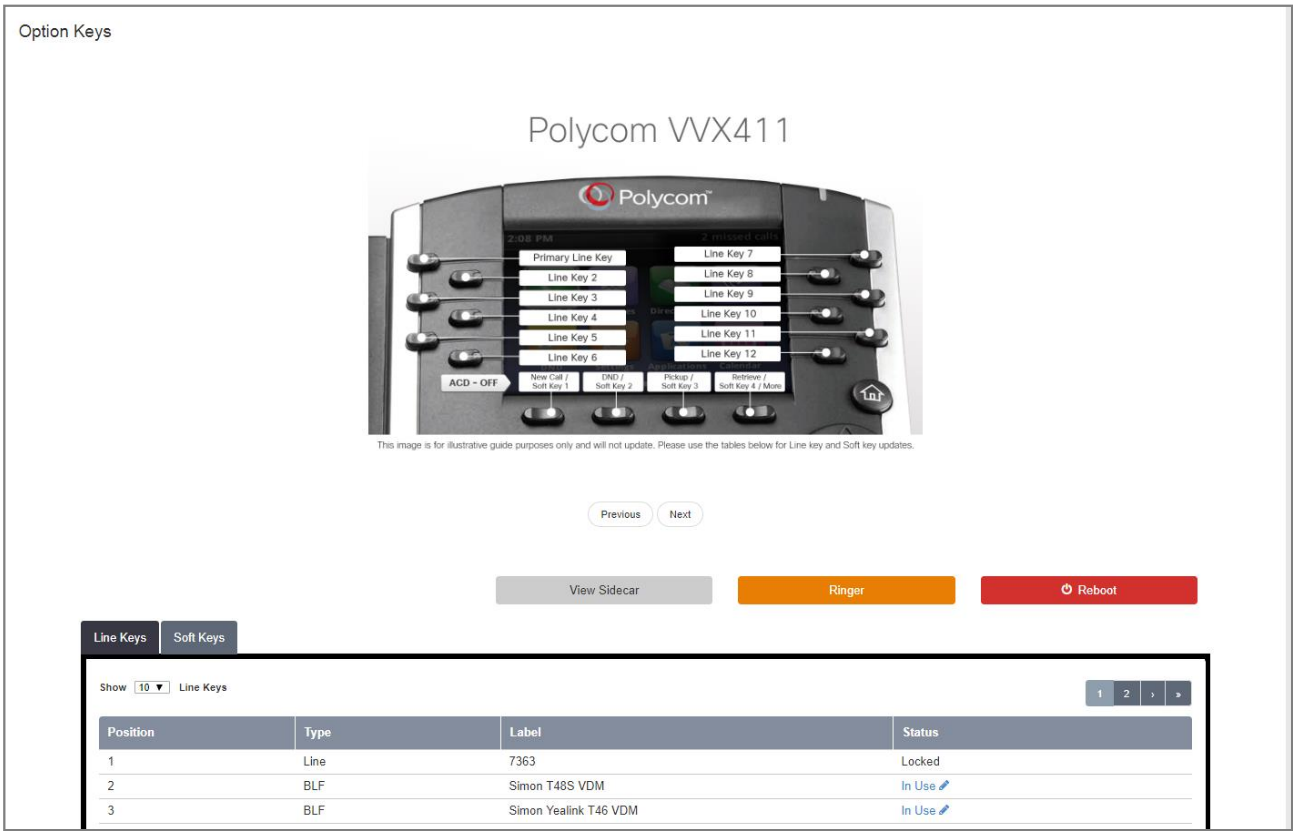
Please refer to the separate LDAP configuration userguide for details on how to configure each device, available on the Document Centre under the following folder:

- Wholesale Hosted Communications/Centrex CPE/General Guides



Option Keys

Clicking on this option will open up a screen similar to the one shown below, depending on the device in use:



The images presented are for illustrative purposes only to show the administrator what the key labels are and if any defaults are set. Where the Device profile has ACD enabled then this image will change to show the correct images with the ACD keys in use. Where a Sidecar expansion module is in use, this can be seen by clicking on the **View Sidecar** image as shown below:

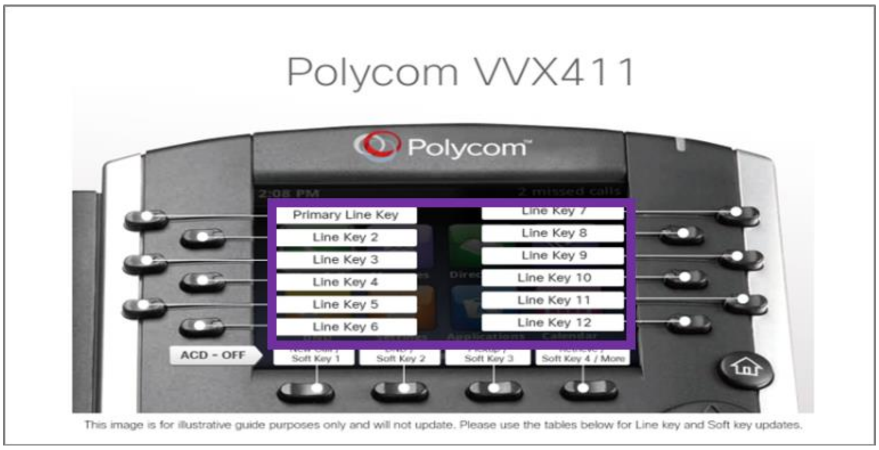
Please note, if you are accessing the device tab from the Employees tab then a VDM device type will have a high resolution image of the device, similar to the below.

The **Configure** button will then be available to use and once clicked will show you the options keys.

Line Keys

A Line key is a soft/hard key that the phone manufacturer has determined can be used for the purpose of assigning a phone number to. The number of available keys depends on the manufacturer and the model number. When you click the customise button it will present you with a static image displaying the number of available keys. Most phones have up to 3 different pages of customisations, and if you are using a Sidecar then you can click the **View** Sidecar button to see the available options here.

An example of where the line keys appear is shown on the sample image below, but will vary depending on the device in use. Don't forgot to use the **Next** button to see any additional pages as most phones will allow more soft keys to be configured.



The line keys table will show a similar image to the one below:

Line Keys | Soft Keys

Show 10 ▼ Line Keys

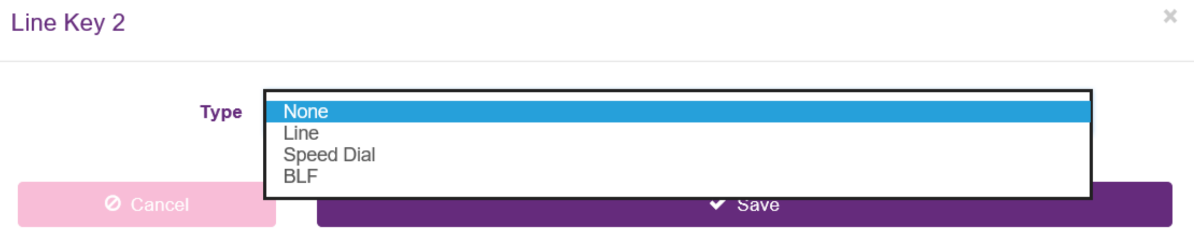
1 2 › »

Position	Type	Label	Status
1	Line	7363	Locked
2	BLF	Simon T48S VDM	In Use
3	BLF	Simon Yealink T46 VDM	In Use
4	BLF	Simon Yealink T48 VDM	In Use
5	Empty		Not Configured
6	Empty		Not Configured
7	Empty		Not Configured
8	Empty		Not Configured
9	Empty		Not Configured
10	Empty		Not Configured

The column headings can be explained as follows:

- **Position** – this corresponds to the number shown on the phones image to show where the key is located.
- **Type –** this displays what the key can be used for and whether it is in use:
    - **Line** – this shows a Line (phone number) with a corresponding User License, note a user's Primary number is always added to Position 1
    - **SpeedDial –** will show if the key has been configured as a quick dial phone number
    - **BLF –** will show if a monitored contact has been added from the BLF Features page or from the Device Management page.
    - **Empty –** will show if the key has not been configured
- **Label** – this will show the data the user has entered against this Line key, *i.e. the name.*
- **Status –** this will show the status of the key in question with the following available options:
    - Locked – configured by BT as part of the device profile and cannot be changed
    - In Use – displayed when the key has been configured on the Business Portal
    - Reserved – displayed when the key has been configured with no data, used to reserve or keep a line key empty on the phones display
    - Not Configured – displayed when the key has not been configured.

Keys that can be edited are denoted in blue with a pencil icon against them, clicking this will allow you to edit the key and will present the following pop-up and options:



- None – This simply inserts a blank into that key and prevents any other key using it
- Line - This is either your Primary Number, an Additional Line or a Shared Call Appearance Line. Please see below for further instructions.
- Speed Dial – This allows you to add a phone number with a name and display this on your phones home screen. Please see below for further instructions.
- BLF – This allows you to add a monitored BLF contact with a name and display this on your phones home screen. Please see below for further instructions.

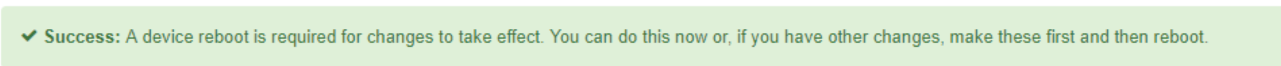
Assign a Line

If you have had an Additional Line or Shared Call Appearance created for you by your Administrator, then this new line will automatically appear in the next available spare Line Key. If you are not happy with this position then you can move it using the **Reorder Line Keys** button in the left hand navigation bar, explained further on in this document.

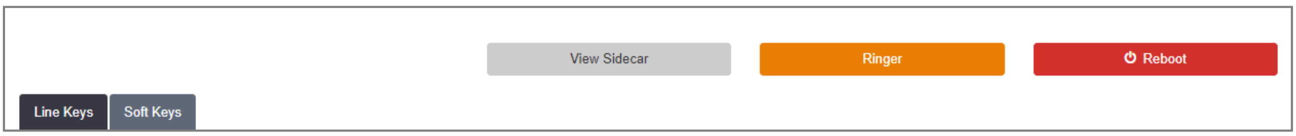
If you want an additional line or shared call appearance to appear in a specific place straight away, before creating the service, this can be done here. By selecting **edit** against a key that has a status of **Not Configured**. Alternatively you can just overwrite an existing key by clicking on the status hyperlink.

Select **Line** from the **Type** drop down.

Click on **Save** and you will be presented with the following message.



The status of the key will still show **Empty** until you have created the additional line or shared call appearance but the status will change to **In Use**. In effect you have reserved this key specifically for an additional line or shared call appearance.

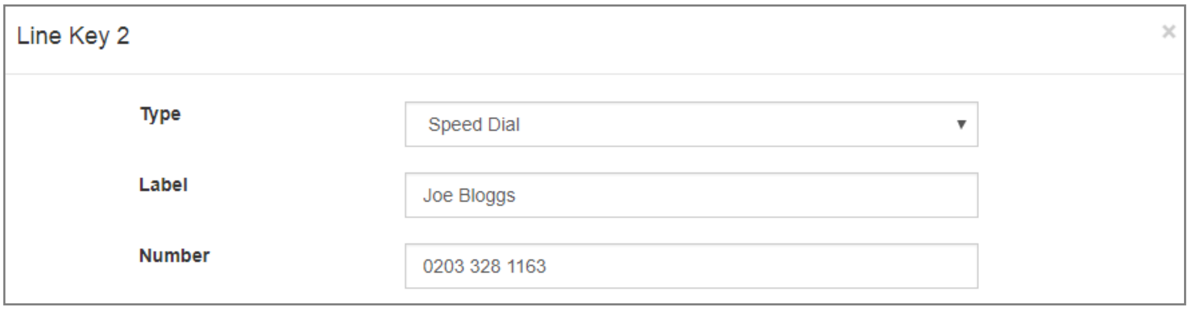


If you have further changes to make then make these first. Otherwise select the **Reboot** button. This will instruct the phone to power off and then back on, once it has powered on the Speed Dial will appear on the phone.

Assign a Speed Dial Key

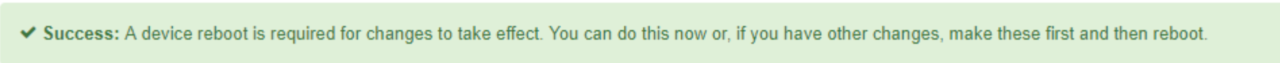
To assign a Speed Dial, select **edit** against a key that has a status of **Not Configured**. Alternatively you can just overwrite an existing key by clicking on the status hyperlink. If you want to add speed dials to the sidecar, then please ensure you select the **View Sidecar** button which will then present these options and advanced you to the correct section of the table.

Select **Speed Dial** from the **Type** drop down.

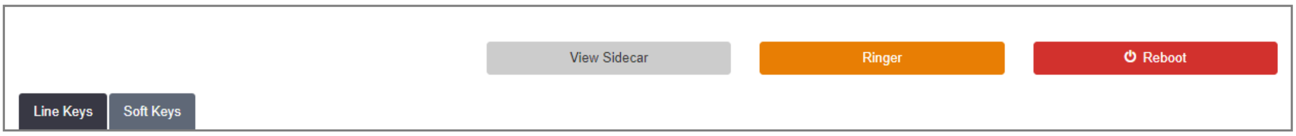


Insert a name in the **Label** box, which will display on the phone, typically this will be the name of the person whom the number belongs to. Enter the telephone number into the **Number** parameter, ensuring you enter this correctly as there is no validation on the number entered here.

Click on **Save** and you will be presented with the following message.



If you have further changes to make then make these first. Otherwise select the **Reboot** button. This will instruct the phone to power off and then back on, once it has powered on the Speed Dial will appear on the phone.



Assign a BLF Key

You can assign a BLF key from the Users Features page on the Business Portal, as show below, using this option will simply assign the users added to the monitored list on the next available keys and in the order they are added to the list in this features settings page.

However if you want to be more specific on what key they appear on, or simply configure it from Device Management, you can click the hyperlink against a key. This option can also be used if you have added all they keys in one go from the features page, and now want to move some of these around. If you want to add BLFs to the sidecar, then please ensure you select the **View Sidecar** button which will then present these options and advanced you to the correct section of the table.

Select **BLF** from the **Type** drop down.

Locate the user from the **User** section and select the radio button to the left of their name.. In here you can scroll through the list which will show all Users on site or you can filter by Site or even search for the user if need be.

Click on **Save** and you will be presented with the following message.

✔ **Success:** A device reboot is required for changes to take effect. You can do this now or, if you have other changes, make these first and then reboot.

If you have further changes to make then make these first. Otherwise select the **Reboot** button. This will instruct the phone to power off and then back on, once it has powered on the Speed Dial will appear on the phone.

Soft Keys

A soft key is a soft/hard key that the phone manufacturer has determined can be used for the purpose of assigning functions to. The number of keys available depends on the manufacturer and the model number. When you click the customise button it will present you with a static image displaying the number of available keys. Most phones have up to 2 different pages of customisations so please ensure you use the **Next** button to see the options available.

An example of where the soft keys appear is shown on the sample image below, but will vary depending on the device in use. Don't forgot to use the **Next** button to see any additional pages as most phones will allow more soft keys to be configured.

The soft keys table will show a similar image to the one below:

Line Keys | Soft Keys

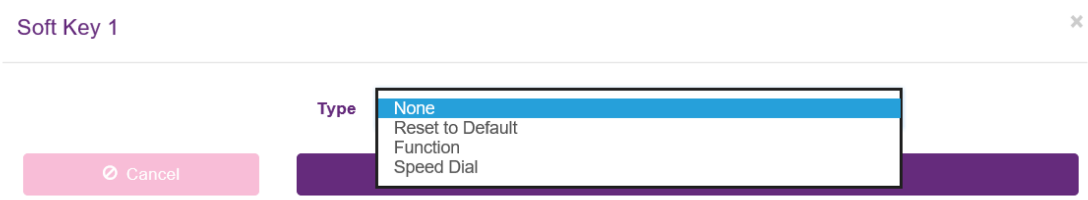
Show 10 Soft Keys

Position	Type	Label	Configure
1	Function	New Call	edit
2	Function	DND	edit
3	Function	Pickup	edit
4	Function	Retrieve	edit
5	None		edit
6	None		edit
7	None		edit
8	None		edit
9	None		edit
10	None		edit

The column headings can be explained as follows:

- **Position** – this corresponds to the number shown on the phones image to show where the key is located.
- **Type –** this displays what the key is being used for and whether it is in use:
- **Function** - This shows you whether the key has been created as a function key
- **SpeedDial –** will show if the key has been configured as a quick dial phone number
- **Reset to Default –** This will simply reset the key back to its original default setting, as displayed on the static phone image.
    - **None –** This simply removes a function key and frees it for further use.
- **Label** – this will show the name of the soft key data, either defaulted or where the user has entered their own data.
- **Configure –** this allows you to edit the key, editable keys are denoted in blue with a pencil icon against them.

When you click on the **Edit** button against a key option, whether in use or spare, the following will be available in the drop down:



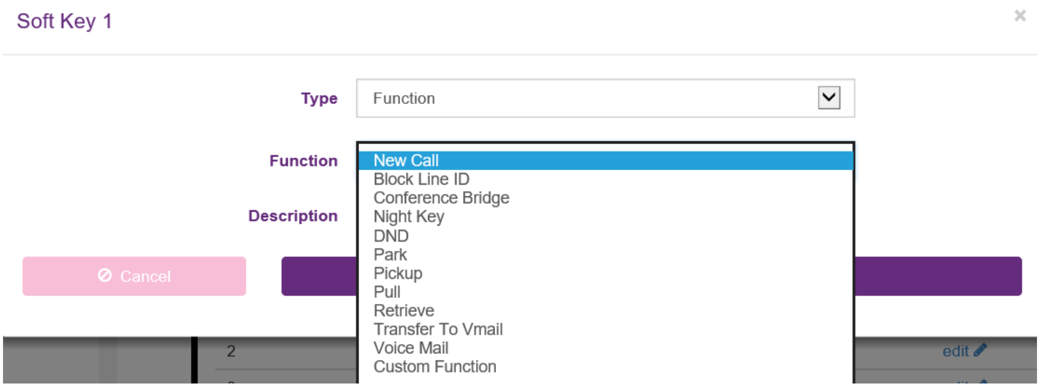
- **None** – This simply removes a function key and frees it for further use.
- **Reset to Default** – This will simply reset the key back to its original default setting, as displayed on the static phone image. Once you do this it will update the configuration file but you will then need to reboot the phone.
- **Function** - This allows you to set a key to operate a specific function from the available list that the platform provides, including setting a Custom Function. For example if you use Office UC Smartphone you may regularly move calls between the mobile and IP phone handsets so here you can assign the Pull function (*11) to a key.
- **Speed Dial** – This allows the user to add a phone number with a name and display this on their phones home screen. Please see below for further instructions.

Assign a Function Key

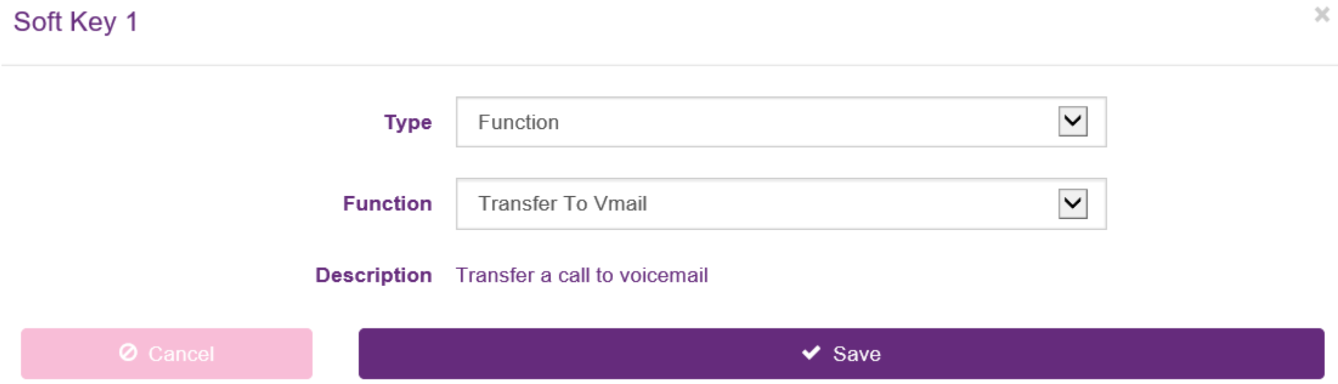
To assign a Function key, select **edit** against a key that is spare.

Select **Function** from the **Type** drop down.

Select one of the options from the **Function** drop down.



Once you select a function key it will also provide a brief description of the keys operation.



The following set of bullets provide a description of all of the functions, please refer to the Site and User Features guides for further detail.

- **Block Line ID** – allows a user to block their number being presented on outbound calls with a single push of a button by utilising the feature *Calling Line ID Delivery – Blocking,* feature access code **31.*

- **Conference Bridge** – allows a user to enter a conference number and a pin number allowing them to dial straight into a conference bridge with a single push of a button.

- **Night Key -** allows a user to enable/disable a Call Forward Always setting on a Huntgroup/Auto Attendant/Call Centre with a single push of a button, thus allowing them to forward all inbound calls to a main number. You will need to then enter the following:

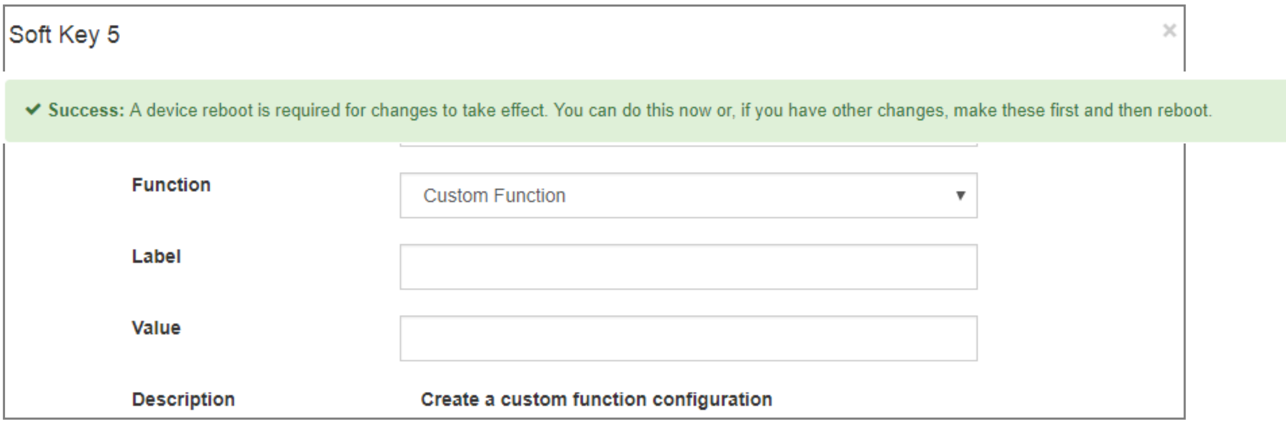
    - **Voice Portal Ext** – this is the extension number set within the Voice Portal feature

- **Service Ext** – this is the extension number of where you want the call to be sent
- **Voice Portal Ext** – this is the extension number set within the Voice Portal feature
- **Action** – this needs to be set as either; 1 to activate Call Forwarding, 2 to deactivate Call Forwarding or 3 to listen to Call Forwarding status.

- **DND -** allows a user to prevent calls coming into their device/s when they do not want to be interrupted with a single push of a button by utilising the feature *Do Not Disturb,* feature access code **78.*
- **Park -** allows a user to park a call on another handset within their pickup group with a single push of a button by utilising the feature *Call Park,* feature access code **68 or #58.*
- **Pickup -** allows a user to answer any ringing line within their pick up group with a single push of a button by utilising the feature *Call Pickup*, feature access code **98.*
- **Pull -** allows a user to seamlessly move calls between different Shared Call Appearance Devices with a single push of a button by utilising the feature *Call Director Move,* feature access code *11
- **Retrieve -** allows a user to retrieve a call from another phone within a pickup group with a single push of a button by utilising the feature *Call Park,* feature access code **88.*
- **Transfer to Voicemail -** allows a user to send a call straight to Voicemail with a single push of a button.
- **Voicemail -** allows a user to dial straight into their Voicemail with a single push of a button by utilising the feature *Voicemail,* feature access code **86.*
- **Custom Function -** allows a user to create their own custom function, utilising other feature access codes, including combinations of these.

To create a Custom Function select this option which will open up a more advanced screen.

Custom functions require you to input a configuration based on macros, which may be different for each manufacturer. Please refer to the manufacturer's user guides from their websites for advice on how to create these.



Click on **Save** and you will be presented with the following message.

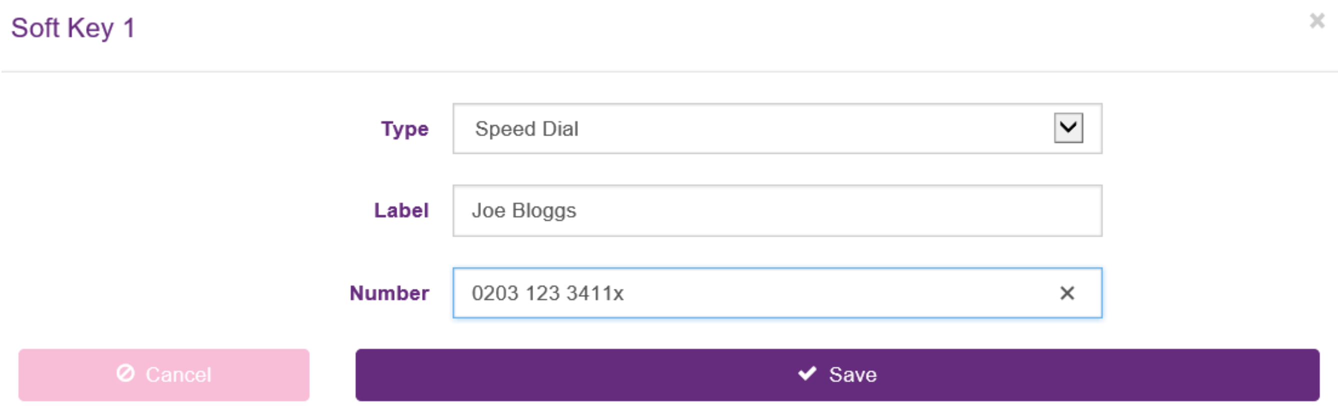
If you have further changes to make then make these first. Otherwise select the **Reboot** button. This will instruct the phone to power off and then back on, once it has powered on the Speed Dial will appear on the phone.

Assign a Speed Dial Key

To assign a Speed Dial, select **edit** against a key that is spare.

Select **Speed Dial** from the **Type** drop down.

Insert a name in the **Label** box, which will display on the phone, typically this will be the name of the person whom the number belongs to. Enter the telephone number into the **Number** parameter, ensuring you enter this correctly as there is no validation on the number entered here.



Click on **Save** and you will be presented with the following message.

✔ **Success:** A device reboot is required for changes to take effect. You can do this now or, if you have other changes, make these first and then reboot.

If you have further changes to make then make these first. Otherwise select the **Reboot** button. This will instruct the phone to power off and then back on, once it has powered on the Speed Dial will appear on the phone.

Ringer

The enables you to change the default audible ring tone used by the phone. If you would like to hear samples of these before you set this, then you need to do this on the phone as per the instructions below:

Polycom Devices

- Select the Home Key
- Select the Settings Key
- Select 1 Basic
- Select 5 Ring Type
- Select 1 Default
- Place a tick in any of the boxes and select the Play button to hear the ring tone.

Yealink Devices

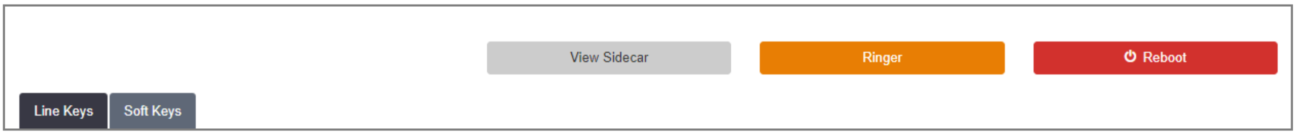
The following is for the T42 device:

- Select Menu
- Select Settings
- Select Basic Settings
- Select Sound
- Select Ring Tones
- Select Common
- Press any of the options to hear the ring tone.

The following is for the T46/48 device:

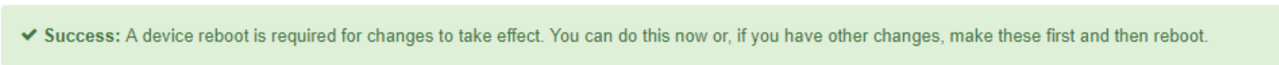
- Select Menu
- Select Basic
- Select Sound
- Select Ring Tones
- Select Common
- Press any of the options to hear the ring tone.

Although you can set the ringer on the phones it will not add it to the configuration file and any future updates will remove it. To set correctly you must do this in the Business Portal by selecting the **Ringer** button.



This will then bring up a series of options, select the one you like based on what you found on the phone.

Click on **Save** and you will be presented with the following message.



If you have further changes to make then make these first. Otherwise select the **Reboot** button. This will instruct the phone to power off and then back on, once it has powered on the Speed Dial will appear on the phone.

Power Save

The **Power Save** option will allow you turn off or further customise when Power Save is initiated on the Device Types. By default, during the hours of 19.00 – 07.00, 7 days a week, the phones screens will reduce their brightness and will look like they have turned off. This is an energy saving policy but does not affect calls or features. Simply touching a button, or screen on touchscreen variants, picking up the handset or receiving a call will immediately bring the screen back to full brightness. If required this feature can either be turned off, or the times and days can be customised

Power Save Settings

	Default	Custom Selection
Power Save	On	On Off

Office Hour Schedule

Power Save mode is active outside of office hours.

Custom

	Default	Custom Selection
Monday	07:00 - 21:00	00:00 - 00:00
Tuesday	07:00 - 21:00	00:00 - 00:00
Wednesday	07:00 - 21:00	00:00 - 00:00
Thursday	07:00 - 21:00	00:00 - 00:00
Friday	07:00 - 21:00	00:00 - 00:00
Saturday	07:00 - 21:00	00:00 - 00:00
Sunday	07:00 - 21:00	00:00 - 00:00

In addition the Timeout Settings can be adjusted which means that when the Device Types become inactive they will ever so slightly reduce the brightness of their screens in order to conserve energy.

The options available are:

- **Office Hour Idle Timeout (min)** – where the phone is operating in hours, so power save is not on or has not yet kicked in, there are still some energy saving benefits. The default is 480 minutes/8 hours before the phone, if idle, will instigate power save.
- **Off Hour Idle Timeout (min)** – once the power save schedule kicks in, it does not need to operate immediately, i.e. straight after 6pm. Setting this can instigate a cool-down period before this happens, with default currently set to 10 minutes.
- **User Input Extension Idle Timeout (min)** – where the phone is operating during the Power Save schedule, but is then used, this determines when it will reactivate power save, with the default set to 10 minutes.

Timeout Settings

Custom

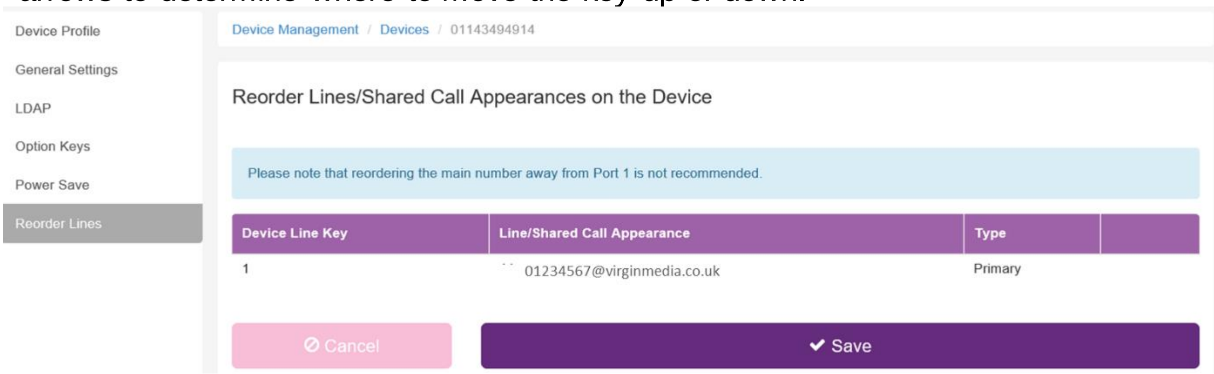
	Default	Custom Selection
Office Hour Idle Timeout (min)	480	
Off Hour Idle Timeout (min)	10	
User Input Extension Idle Timeout (min)	10	

Cancel | Save

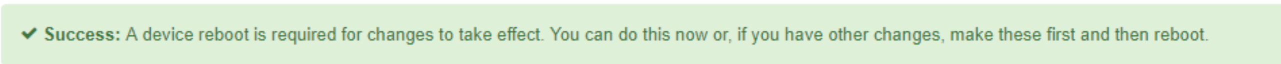
BUSINESS

Reorder Lines

The **Reorder Lines** option will allow you move the position of any Additional Lines or Shared Call Appearances around if you are not happy with their position. Simply use the arrows to determine where to move the key up or down.



One you have made your changes. click on **Save** and you will be presented with the following message.



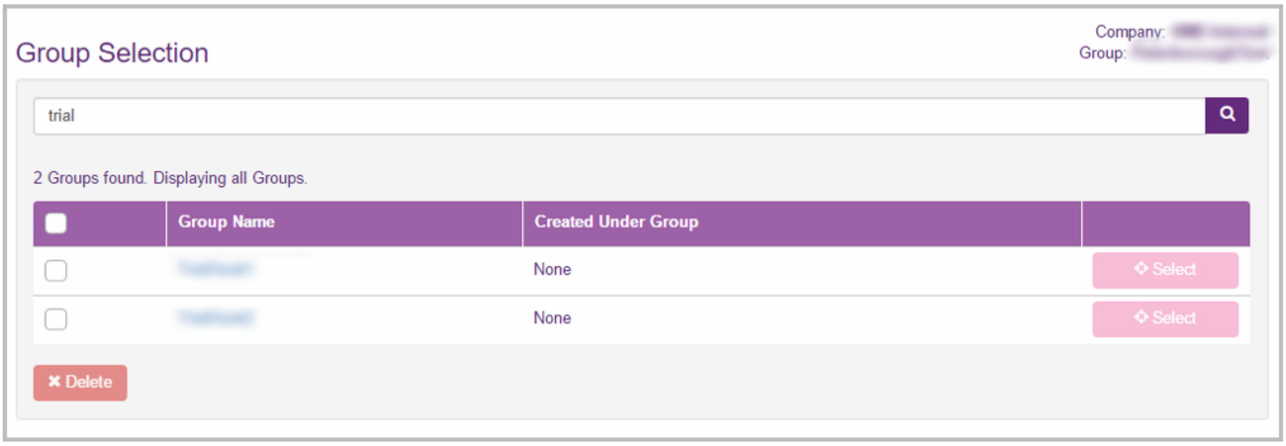
If you have further changes to make then make these first. Otherwise select the **Reboot** button. This will instruct the phone to power off and then back on, once it has powered on the Speed Dial will appear on the phone.

BUSINESS

Adding & Managing Groups (Optional)

As a Company Administrator, you can use the Business Portal to create a hierarchy of Groups for organising your Company's Employee accounts. Each Group you create can act as a container for other Groups, for specific sets of Employee accounts, or both. You can build a multi-level Group hierarchy by creating one or more top-level Groups, and then by adding sub-Groups within this top-level Group. Once you have created a Group hierarchy, you can assign Employees to specific Groups or create additional Groups as required.

You can use Groups to organise your Company's user accounts in any meaningful way. For example, you can use Groups to reflect your Company's real-world organisational or functional structure:



When you start to manage your Company's hierarchy of Groups and user accounts, you will notice that some Groups have already been created. These Groups represent your Company and its geographic location(s), specifically, the Company Site(s) at which the service can be activated. These Groups are created by Virgin Media Business when the service is set up and appear as top-level Groups.

As a Company Administrator, you cannot create Company Site-specific Groups. You can view the Site- specific Groups that Virgin Media Business has created, modify their properties, and assign administrators to them, just as you can with any Groups you create. Unlike the Groups you create, however, when you assign a Group Administrator to a Group that represents a Site, you give this User the ability to configure service features that apply to the Site as a whole.

Employee Groups Sidebar

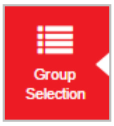
When you select the **Employee Groups** tab you will be presented with a left-hand side bar, which provides administrative functions for that Group, as per the screenshot below:

Group Selection
Select your Group to manage or delete.
Add Group
Select this tab to 'Add' new Groups.
Profile
Select this tab to view contact details and other information for the Group.
Group Admins
Select this tab to assign a Group administrator to a Group or Site. You would give this Employee the ability to create, manage, and delete user accounts, sub-groups, and service activations within the Group.
Group Memberships
Select this tab for Employee association to Groups.

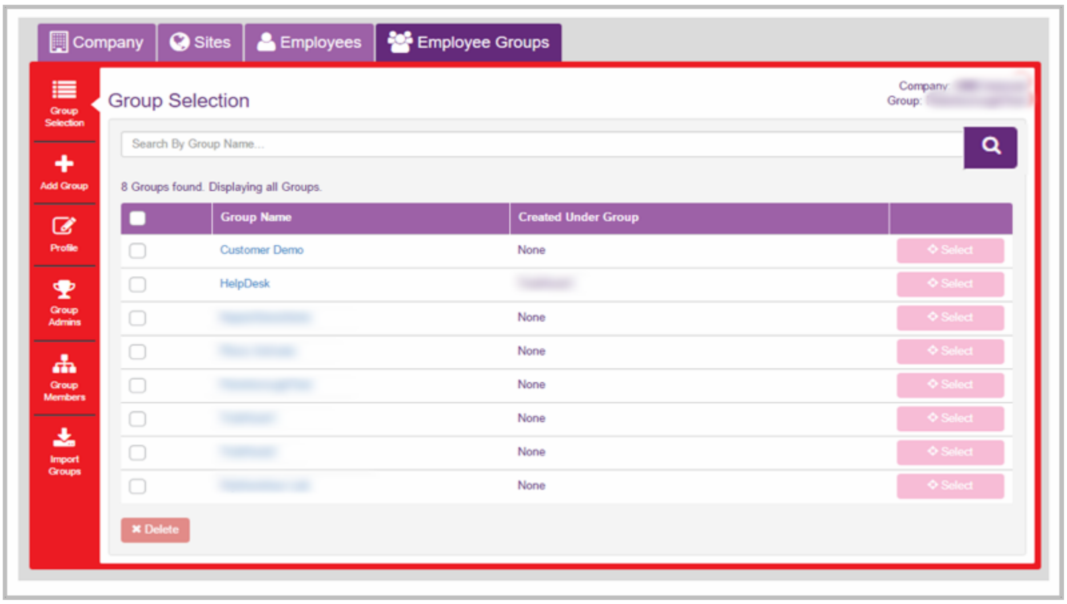
Import Groups
Select this tab for importing Groups.

Group Selection

Select this tab to manage or delete Groups:



You can search by Site name or Group name by simply hitting the **Search** button to return a list of all Groups or by entering a name before searching. Please note that Sites are classed as Groups and are automatically built as standard.

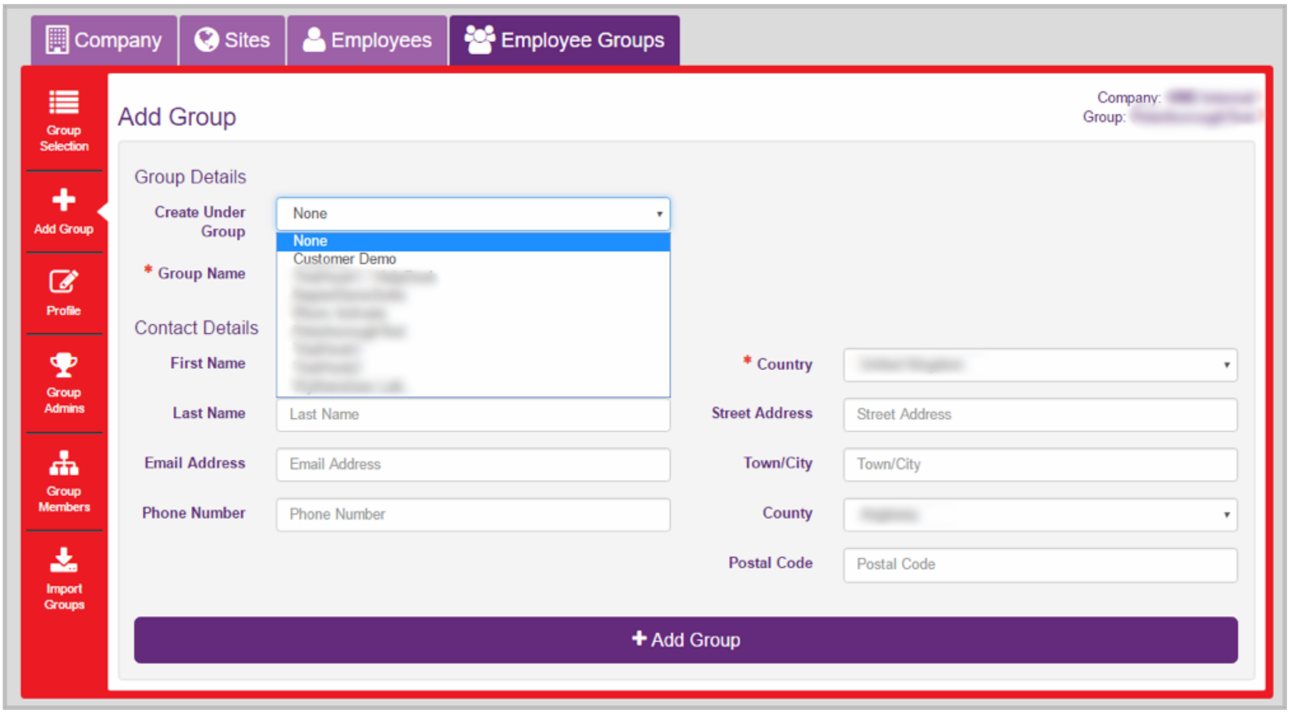


Add Group

Select this tab to add new Groups:

If you are logged in as a Company Administrator, this page lists all the Groups that currently exist within the Company. If you are logged in as a Group Administrator, this page lists the Groups for which you have been assigned administrative privileges.

You can use the Business Portal to add Users to Groups that represent the logical organisation of the Company at any time. You can then add the User to any existing Group or remove specific Group Memberships as required. If you are a Group Administrator, you can only manage Group Memberships on behalf of Users who are members of the Groups for which you have been assigned administrative privileges.



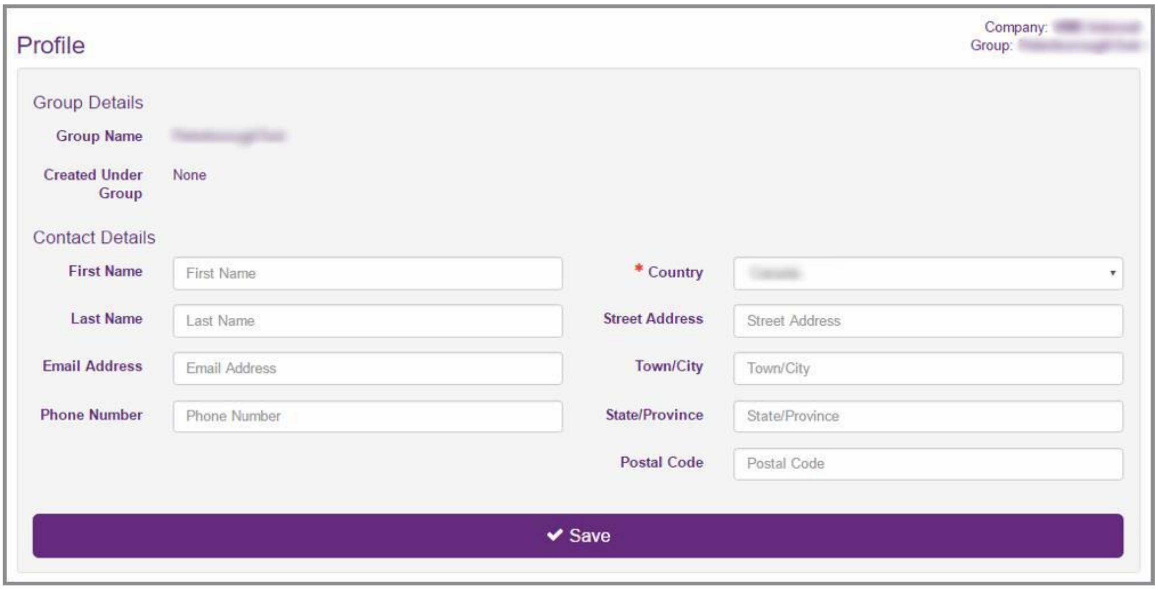
To add a Group, select **Create Under Group** and complete the required fields

Profile

Select this tab to see or amend a Group profile:

You are able to view or amend the following:

- **Created Under Group** – The Group that the current Group was created under. If it is a top-level Group, this value is “none”. If it is a sub-level Group, this value is the name of the Group or Groups above the current Group in the hierarchy, for example, “Sales“ or “Sales/Sales West”.
- **Group Name** – The name of the Group. Once you create a Group or sub-Group, you cannot change its name.
- (Optional) Contact First Name
- (Optional) Contact Last Name
- (Optional) Contact Email Address
- (Optional) Contact Phone Number
- (Optional) Address



Group Admins

Select this tab to assign a Group Administrator to a Group:

When you assign a Group Administrator to a Group, you give this Employee the ability to manage user accounts and sub-groups within the Group. When you assign a Group Administrator to a Group that represents one of your Company's Sites, the Group Administrator also gains the ability to configure the service features that apply to the entire Site.

When you assign a Group Administrator to a Group, the administrative capabilities extend to all sub-Groups contained within the Group. These privileges do not extend upward within the Group hierarchy.

You cannot assign Group administration privileges to users who have Employee or Company administrator accounts. Employee accounts have no administrative capabilities; Company Administrators automatically have administrative privileges for all Groups within the Company. You therefore need to change the employees' administration layer to **Group Admin** under the **Profile** tab of the User.

If you are a Company Administrator, you can use the Business Portal to assign a Group Administrator to any Group or sub-Group. If you are a Group Administrator, you can use the Business Portal to assign Group Administrators to any of the Groups you manage.

Assign an Administrator to a Group

Set the Group that you want to assign Administrators to, as described in Group Selection side tab then follow these simple steps:

1. Select the **Group Admins** side tab and **Search**.

2. Select the desired Administrator(s).

3. You can limit the search by selecting one of the following:

   - All Group administrators

   - Administrators Of This Group

   - Administrators Not Of this Group

4. Select the check box beside the name of each Employee to whom you want to grant administrative privileges for the Group or clear the check box beside the name of

each Employee from whom you want to remove administrative privileges for the Group.

5. Click **Save** to save your changes.

6. A message is displayed at the top of the page to indicate that the Group's administrator settings have been updated

Group Members

Select this tab to assign a Group administrator to a Group:

Once you create a Group, you can select it and assign Employees (or "members") to it to continue building your organisational hierarchy.

If you are a Company Administrator, you can assign any Employee to any Group. Similarly, you can remove Employees from specific Groups or move Employees between Groups as required. If you are a Group Administrator, you can assign Employees to any Group you have created or for which you have been assigned administrative privileges. Similarly, you can remove Employees from any of the Groups you manage.

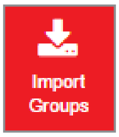
Set the Group that you want to assign administrators to, as described in Group Selection side Tab and select **Search**. If you are logged in as a Company Administrator, this page lists all the Groups that currently exist within the Company. If you are logged in as a Group Administrator, this page lists the Groups for which you have been assigned administrative privileges.

Select the check box beside the username of each Employee that you want to add to the Group or clear the check box beside the username of each Employee that you want to remove from the Group, then select **Save.**

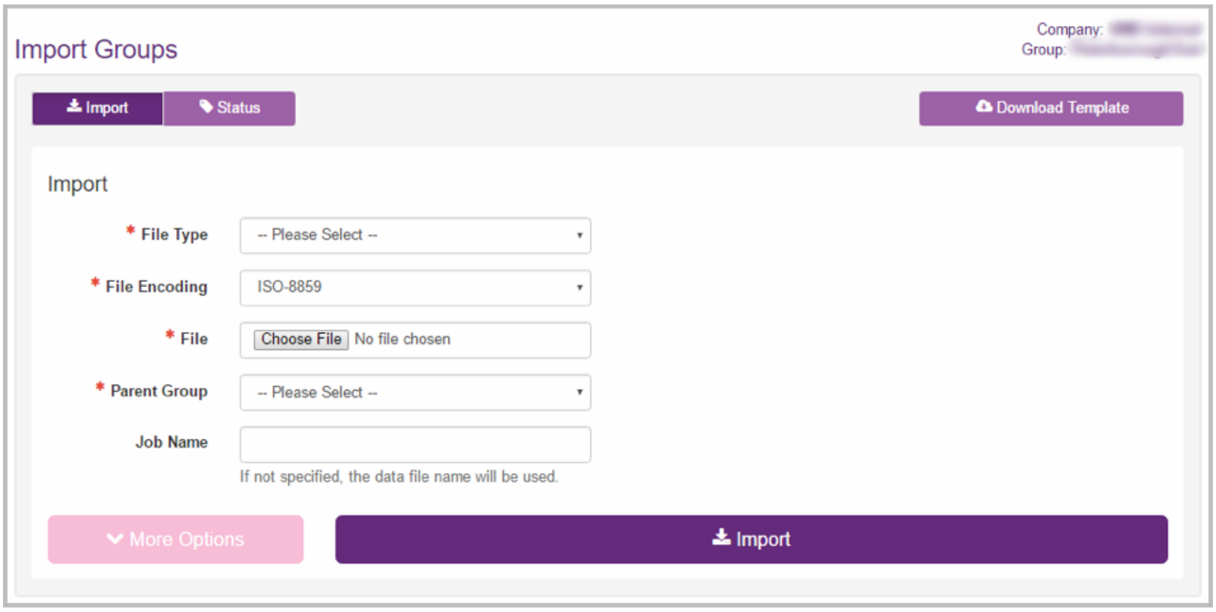
A message is displayed at the top of the page to indicate that the Group's administrator settings have been updated:

Import Group

Select this tab to import groups rather than creating them on the portal:

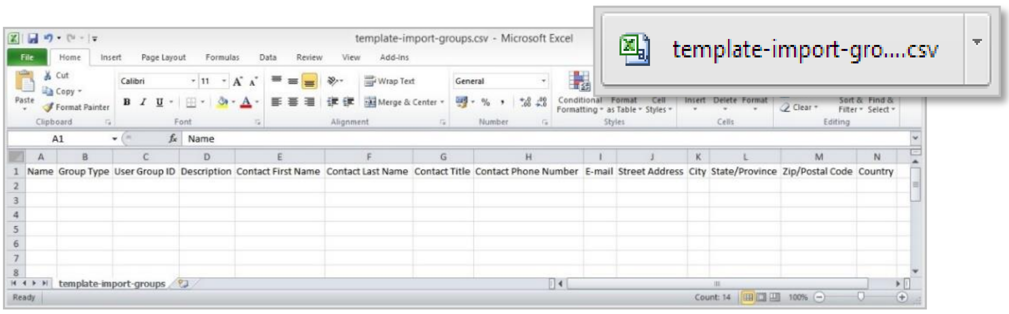


Preparation and Importing Groups



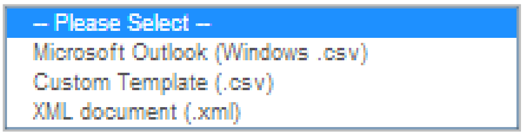
The following sections describe tasks you must perform using applications other than the Business Portal. It is recommended that you consult the documentation provided with these applications as you perform these tasks.

1. Click the Download Template link.



If you are filling in a Group template, you must specify a value in the **Name** column for each Group you intend to import e.g. Sales Group.

2. Select the type of file from which you want to import Groups.



You can choose Microsoft Outlook (.csv), Custom Template (.csv), or XML Document (.xml). The file type you choose must correspond to the file that contains the Group information you want to import. ***Custom Template (.csv) is recommended for Group Import files created using Microsoft Excel.***

3. Browse and Select the file you want to import.

4. Select the Parent Group you need the Group imported.

5. Type a name for the import job in the field provided; this name will be used to identify the job so that you can track its progress.

6. More options:

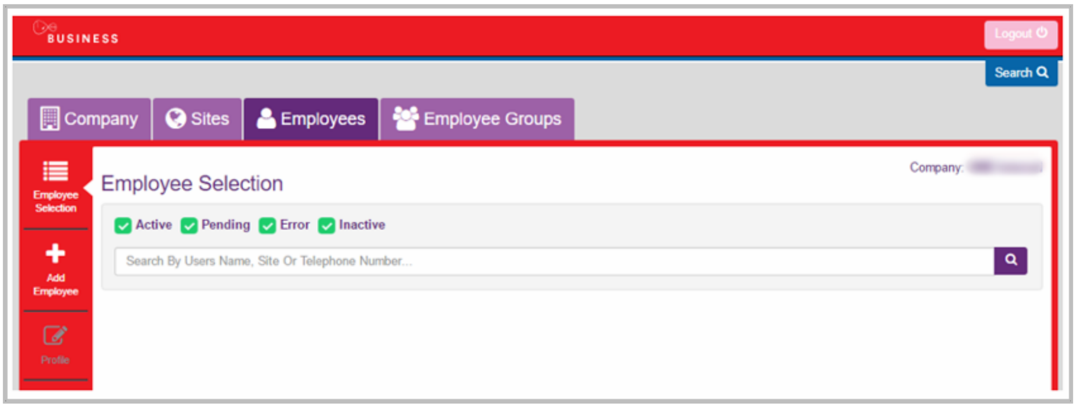
   - **Schedule** – Start now or select a future date and time.
   - Method:
     - a) Add New Groups – Adds all new Groups specified in the import file; does not change the information for Groups who already exist within the selected target Group.
     - b) Update Current Groups – Overwrites the information for existing Groups with the information specified in the import file; does not add new Groups specified in the import file.
   - **Priority** – Low, Medium, High
   - **Mode** – **Run In Test Mode** is recommended for first-time users to test the Job before submitting.

7. Click **Import**.

8. You can check the status of any ongoing or completed import jobs using the Check Status page.

Managing Employees

The Employee will be able to log in and manage their own features and passwords etc. However an Administrator can also do this, as well as administer the Employee's Devices. (Employees can't administer their own devices.)



Employees Sidebar

When you select the **Employees** tab you will be presented with a left-hand side bar, which provides administrative functions for that User, as per the screenshot below:

Employee Selection
Search and select Employees to manage, activate and deactivate

Add Employee
Not currently available.

Profile
Select this tab to view address details, administrative privileges (role) and reset portal passwords.

Service Settings
Select this tab for Service Settings (Feature Packs and Add-ons, DDI, etc.) and Resetting Employee Passwords for Voice Portal Pin (numbers only) and Applications.

Features
Select this tab for Employee Feature management.

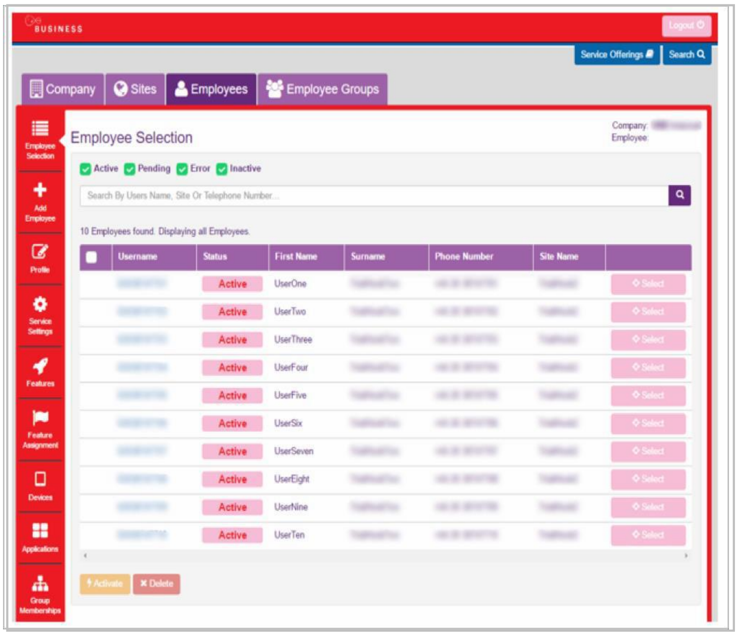
Devices
Select this tab for a list of the Employee's associated devices (Primary and additional Shared Call Appearance Devices) and to add new devices for the Employee.

Applications
Select this tab for the Employee's application username, to reset the application password and a quick links to download the applications available for the Employee.
Group Memberships
Select this tab for Employee association to Groups.
Admin Privileges
Assign Groups to administer for Employees with the Group Administrator role.
Dashboard
Select this tab for the Employee's dashboard including Quick Feature Management, Call History, Voice Mail Message Summary and Call Logging.
Import Employees
Not currently available.

Employee Selection

Select this tab to search, select and manage Employees.

You can search by Employee name or simply hit the **Search** button to return a list of all Employees, which will then allow you to perform a number of changes as detailed after the Add Employee selection below



Add Employee

Though the add employee tab is available, the add employee functionality is not available at this time as this would impact your contract.

If you want to add employees, please contact your sales representative at Virgin Media Business.

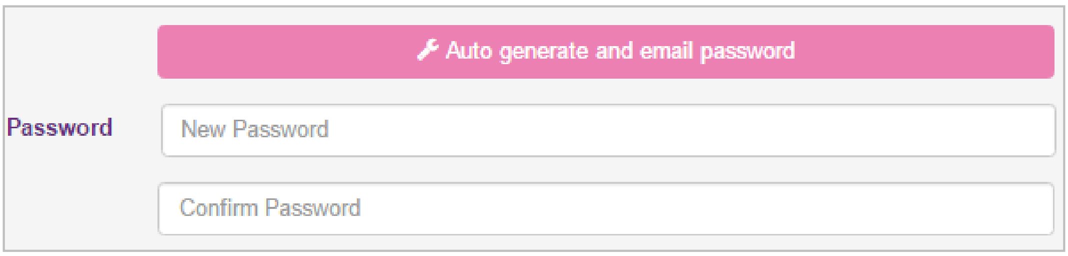
Profile

Select this tab to see a profile of the User and to modify some elements:

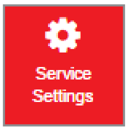
The User Profile is mainly informational and consists of the following:

- Username
- Employee Address details
- Employee Role – Customer, Group Administrator or Employee (this can be changed)
- Address fields

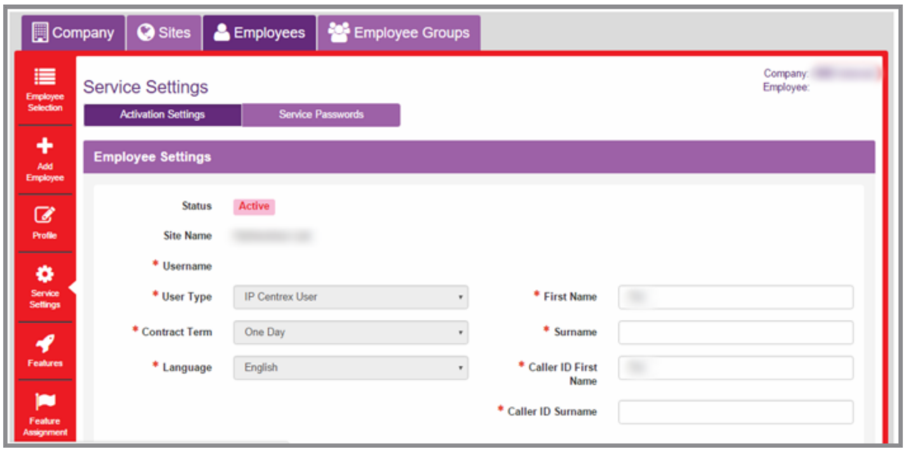
As a Company or Group Administrator, you are also able reset the User's password for them. Selecting **Auto generate** will set a secure password and automatically send it to the Employee:



Service Settings



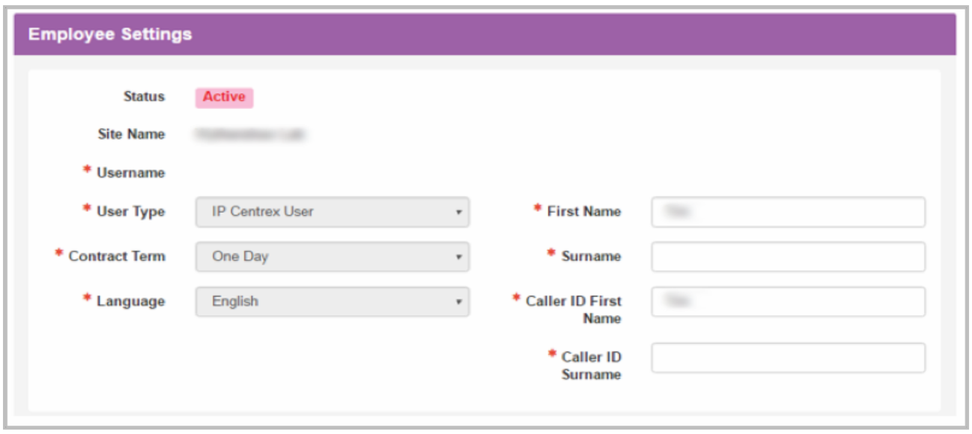
Select this tab to Modify configuration settings for an existing User.



Employee Settings

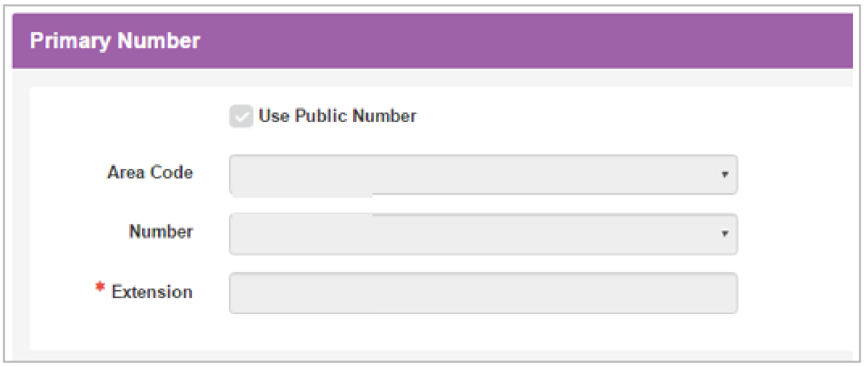
By default you are able to change the following settings on this page:

- First Name – User's first name
- Surname – User's last name
- Call ID First Name – The first name that is displayed to other parties during calls that you place or receive
- Caller ID Surname – The last name that is displayed to other parties during calls that you place or receiveThe non-editable fields show choices that have been selected for that User as part of the Agreement.



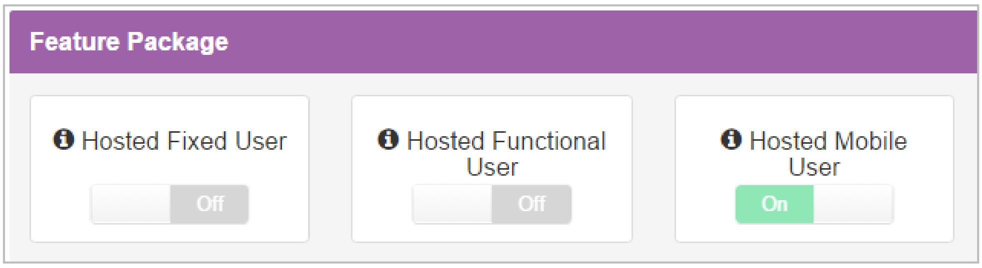
Primary Number

By default this section is informational only and displays what telephone number and extension number you were given when the service was set up for you:



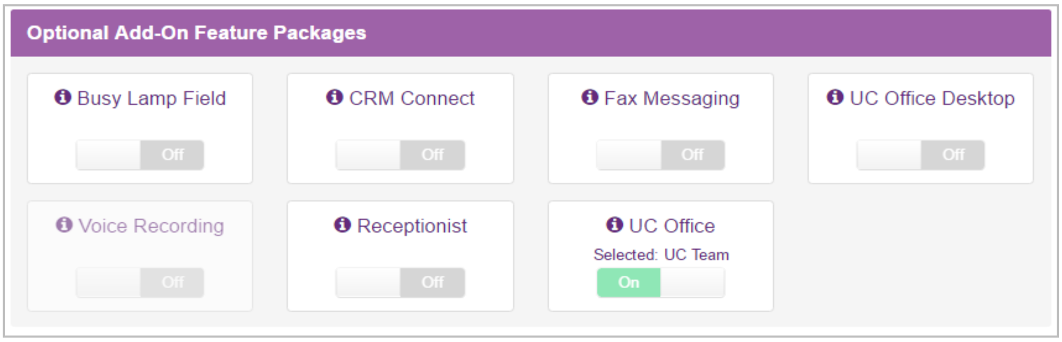
Feature Package

By default, this section is informational only and displays what Line Pack (User feature pack) the Virgin Media Business Administrator allocated to you when the service was set up for the user as per the Agreement:



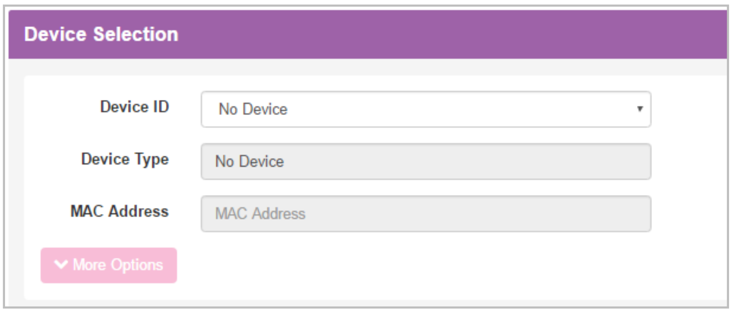
Optional Add-On Feature Packages

By default, this section is informational only and displays what Add-On Features the Virgin Media Business Administrator allocated to the User as per the Agreement:



Devices

Use the options provided to Modify the Employee's Primary Device, by selecting one that has already been created under the Site:



If you are using the Additional Line feature, whereby you want to add another line to an existing User's phone, then ensure you select that existing device. If you select **New Device**, you must choose the appropriate device type from the Device Type field and fill in the MAC Address (required).

Resubscribe a User

Resubscribe allows you to control when/if you will roll out new features to existing Users. In order to resubscribe a user, and make any new features appear, a Virgin Media Business Administrator would have needed to have resubscribed the Company and Site beforehand.

If instructed to resubscribe a user, you simply need to scroll down to the bottom of the page and select the **Save** button from within Service Settings. This will then reconnect to the server to check for any new features. During this process the user's status will changed to Pending, before moving to Complete, approximately one minute. Once completed, simply navigate to the features page and search for the new feature.

Remove Employee

Please contact your sales representative at Virgin Media Business to remove employees. This functionality is not available yet as this will impact your Agreement.

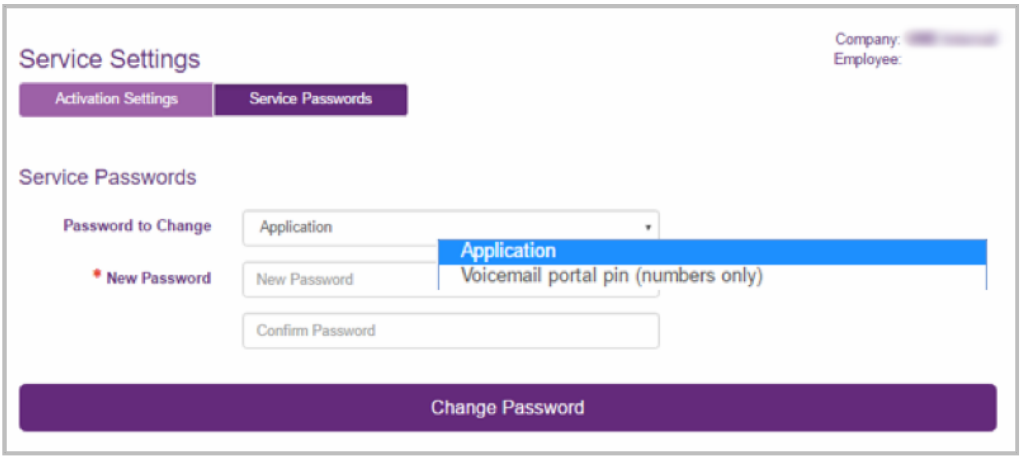
Service Settings – Service Passwords

As an Administrator, you can use the Business Portal to change your Employee's passwords on their behalf or they can manage these themselves under their **My Account** tab:

The following passwords can be changed:

- **Application** – Changing the Application password changes the password that Employees use to access the Applications associated with them.

- **Voice Portal PIN** (numbers only) – this is their Voicemail PIN and Voice Portal passcode



Features

As an Administrator, you can use the Business Portal to change your Employee's features on their behalf, or they can manage these themselves under their account login. No hierarchal precedence is set when features are changed, so if a User makes changes, after an Administrator has, the User ones will be the ones

activated.

The Features are categorised as follows:

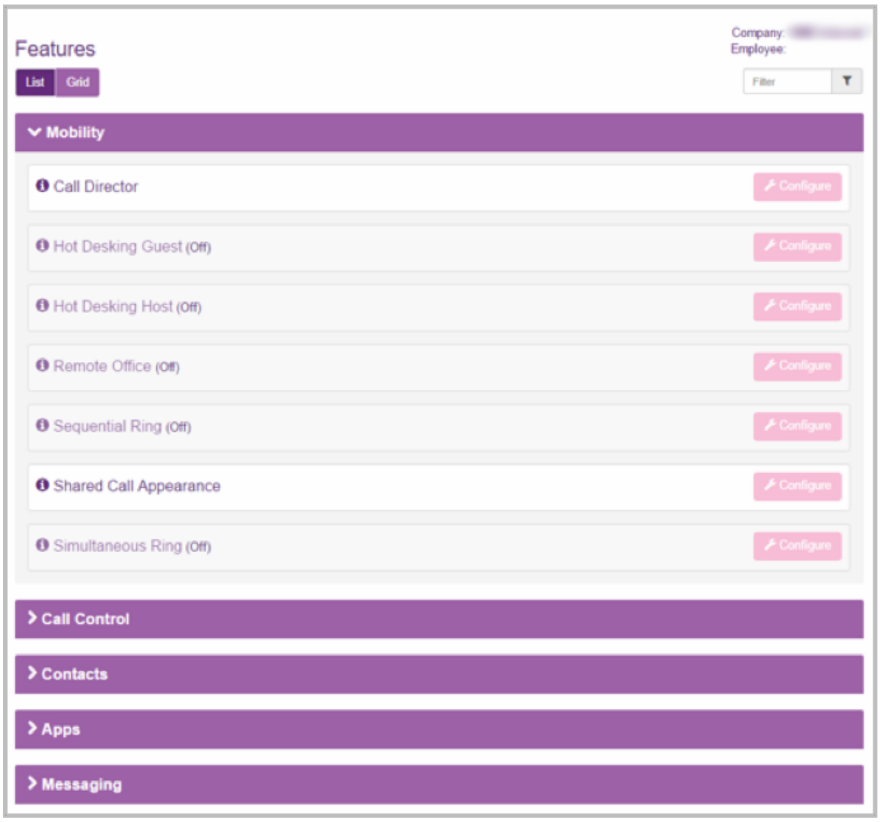
- **Mobility** – Subject to the Feature Package ordered, this category will allow you to configure the features that allow call mobility, e.g. Call Director, Remote Office etc.

- **Call Control** – Subject to the Feature Package ordered, this category will allow you to configure the features that allow call control, e.g. Call Forwarding, Call waiting etc.

- **Contacts** – Subject to the Feature Package ordered, this category will allow you to configure the contacts and directories-related features, e.g. Personal Contacts, Phone Services or Speed Dials.

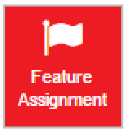
- **Apps** - Subject to the Feature Package ordered, this category will allow you to configure the applications available for Cloud Voice, e.g. Mobile, Tablet, Desktop.

- **Messaging** – Subject to the Feature Package ordered, this category will allow you to configure the Employee's Voicemail, Fax Messaging features etc



Features Assignment

Select this tab to remove features from a User:



As a Company Administrator or Group Administrator, you can use the Employee Feature Assignment page to view the features that have been assigned to your Employees. You can also change these assignments, making features available or unavailable to individual employees as required.

The changes you make to the feature assignments for a given Employee only apply to that Employee. If you disable a specific feature, it is not available for use by that Employee. Similarly, only features that are currently enabled can be configured using the Employee Feature Settings page. When you disable a feature, all corresponding configuration capabilities are also disabled. You can change an Employee's feature assignments at any time.

If you are a Company Administrator, you can view and edit feature assignments for any of your Employees. If you are a Group Administrator, you can only view and edit feature assignments if you have been granted administrative privileges for a Group that is being used to represent one of your Company's Sites.

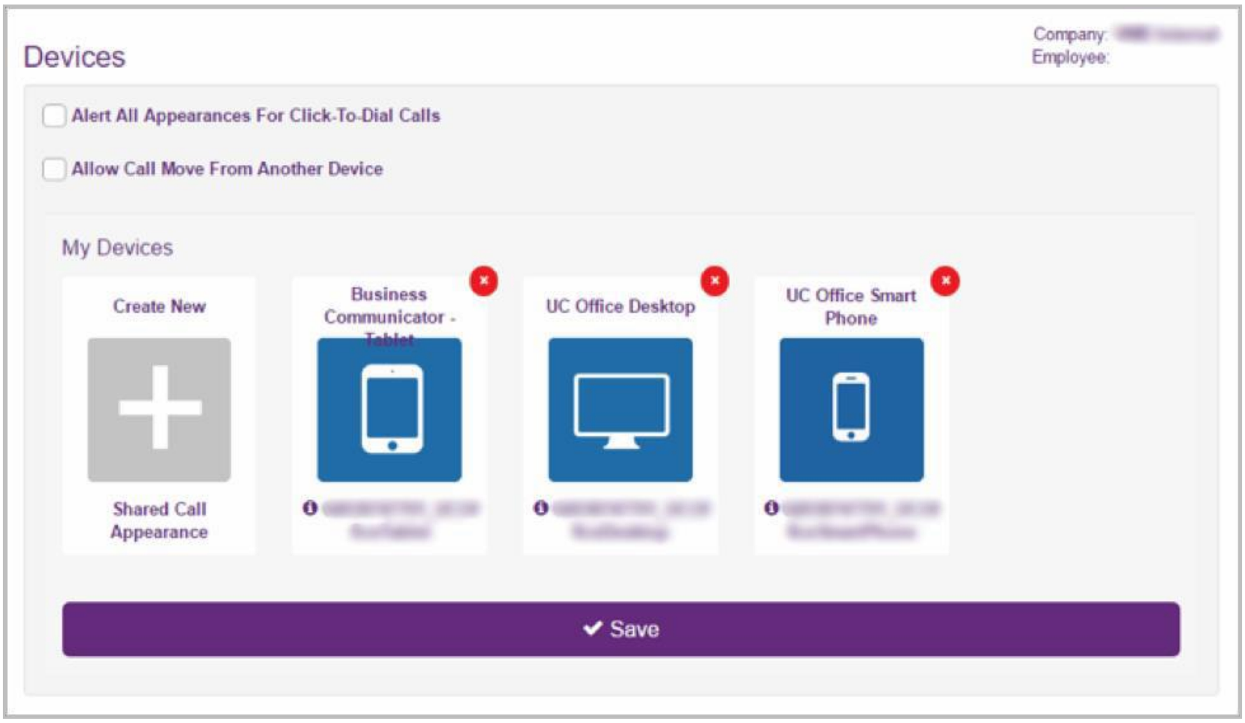
To assign or remove features, or to permit or deny a Group Administrator the right to make changes, select or clear the check boxes in the **Allow Admin Privileges** list.

Devices

Use this option to change device settings and/or add a new device:

Each Employee will have a device associated with them to enable them to make and receive calls. The Shared Call Appearance 5 feature (subject to feature pack ordered), allows an Employee to have up to five additional devices associated with them. This allows incoming calls to ring on all of the devices simultaneously and outbound calls can be made from any one of the associated devices, all using the associated single telephone number.

The device that is associated with the Employee during setup is the Primary Device. All associated devices are considered alternative locations and are Shared Call Appearance Devices. Please note that a softphone application is considered a device and will be listed under **Devices**:

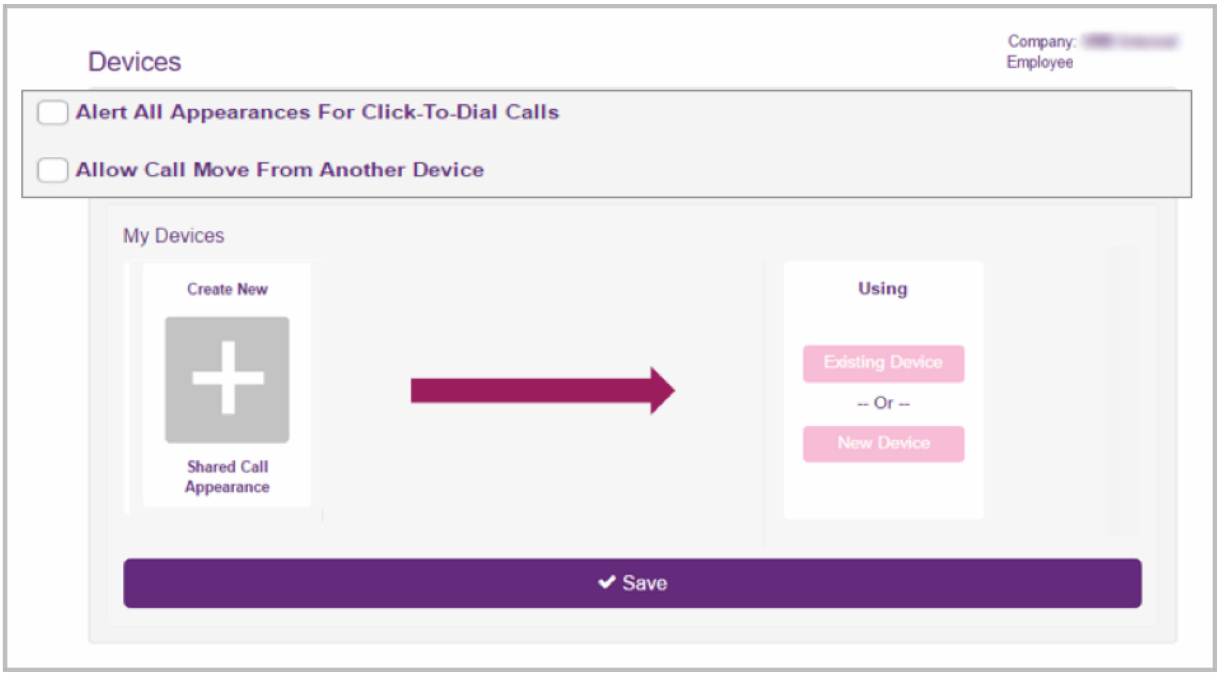


You can add a new device by selecting **Create New Shared Call Appearance.** This will allow you to add an **Existing Device** available under the Site or add a completely **New Device**. Please refer to the *Site* section of this guide for information on adding new devices.

The following options can also be set against each device:

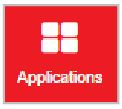
- **Alert All Appearances For Click-To-Dial Calls –** When enabled, your primary and SCA (Shared Device(s)) locations are alerted for a Click to Dial call.

- **Allow Call Move From Another Device –** This allows you to dial a FAC (Feature Access Code – Call Retrieve and Call Director Call Move – *11) to retrieve an existing active call from another location (Shared Device(s)):



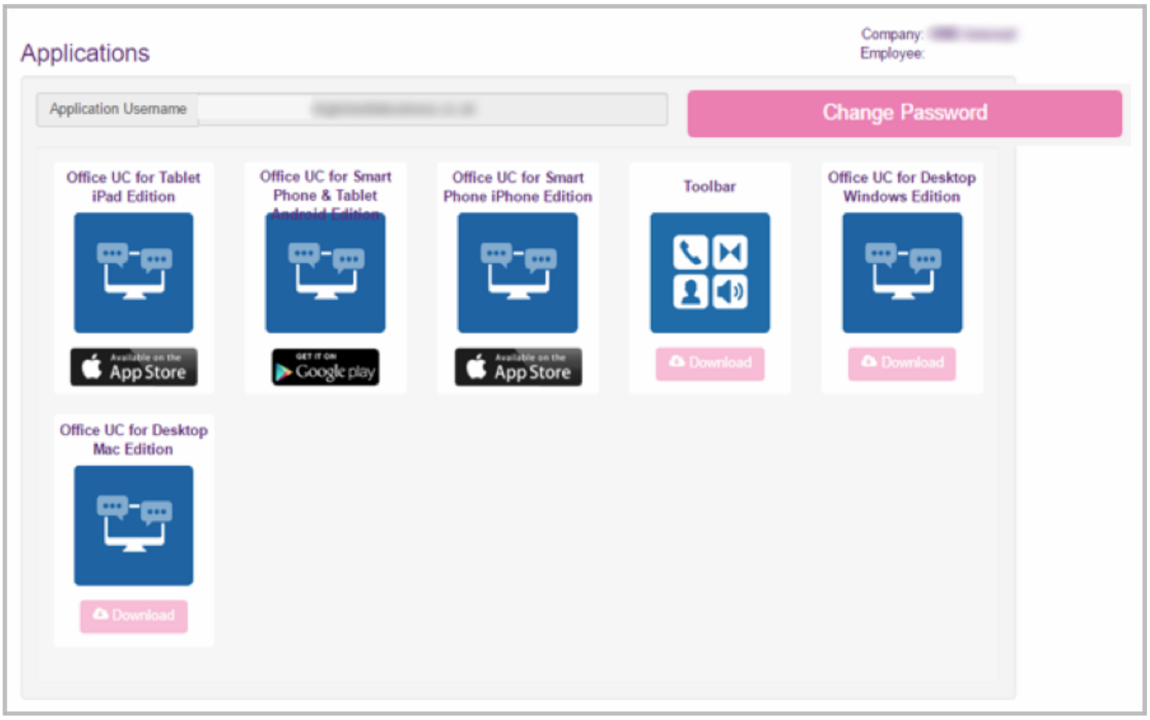
Applications

Select this tab to see what Applications are available to an Employee:



Within this page, we list the Application Username for reference and offer the opportunity to change the password. Changing the password for applications does not generate an email, so you will need to pass this to the Employee if it is changed here. Alternatively the Employee can do this themselves under their Service Settings.

On this page you or the Employee can also download the Apps by either downloading directly to their PC/Mac or via the Apple App Store or Google Play:



Group Memberships

Select this tab to manage which Group(s) the Employee is a member of:

From this page you can see:

- All Groups
- Groups of Which This Employee Is A Member
- Groups of Which This Employee Is Not A Member

If you want to add the Employee to a Group then simply place a tick in the box and hit **Save**. Alternatively you can remove them from a Group by removing the checkbox against the Group, followed by **Save**.

For Group Creation, Managing a Group or Deletion of a Group refer to *Adding and Managing Groups* in this guide. This area allows you to manage which Group(s) the Employee is a member of.

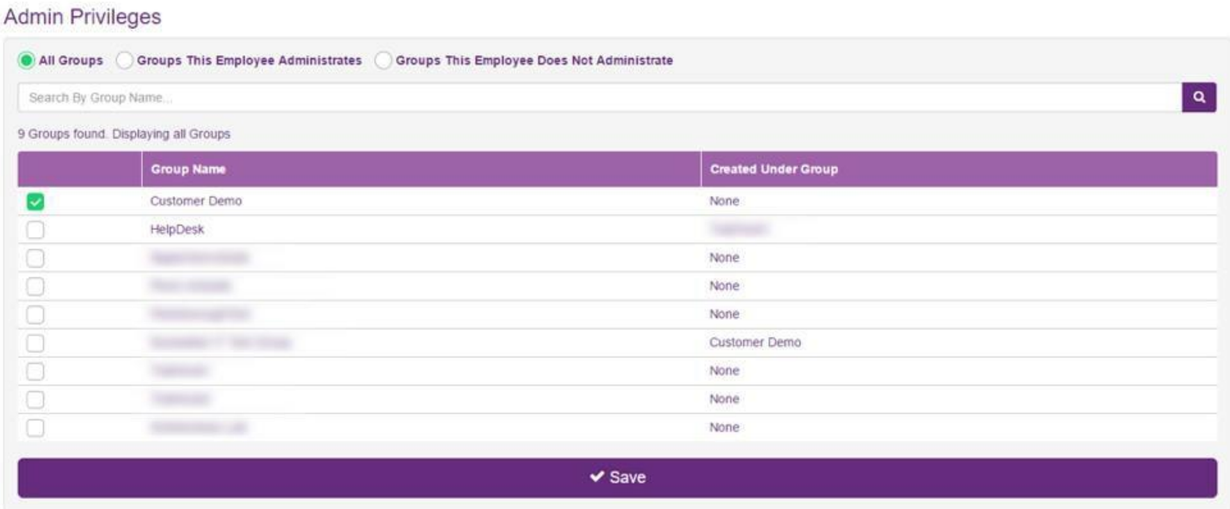
Admin Privileges

Select this tab to see what administration privileges the Employee has:

By default, Employees with the Group Administrator role have privileges that allow them to manage Employee accounts and Groups. However, these privileges are only enabled when the Group Administrator is assigned to a specific Group.

If you are a Company Administrator, you can assign Group Administrator users to any Site or Group within your organisational hierarchy. If you are a Group Administrator, you can assign other Group Administrator users to any of the Groups you currently manage.

When you assign a Group Administrator to a Group, the administrative privileges extend to all sub-groups contained within the Group. These privileges do not extend upward within the Group hierarchy. You can change a Group Administrator's Group assignments at any time:



Filter Groups by selecting the top radio buttons – All Groups, Groups This Employee Administrates and Groups This Employee Does Not Administrate.

Import Employees

This section is for information only. To import employees will impact your Agreement and therefore you will need to contact your sales representative at Virgin Media Business.

Thank you

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