



Office Administrator Portal

User Manual



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Welcome to the Office Administrator Portal

The Office Administrator Portal allows management of IP communications that include Web-managed, IP-PBX telephony capabilities for individual users and businesses. The technology resides in a service-provider's network, which provides a single-line solution with superior QoS voice-band applications for existing analog or IP-enabled MGCP telephones. In addition, the technology includes an integrated platform for delivering enhanced voice, video, and data applications for converged networks.

These Help instructions pertain to the Office Administrator Portal. With the Office Administrator Portal software you can add and manage the setups for users, configure features, numbers, adapters, Call Center, and other company-wide features.



Logging into the Office Administrator Portal

The Office Administrator Portal lets you manage all of the features available on your Internet-hosted telephone.

Note: Only one person can be logged into the Office Administrator Portal at a time. If a second administrator logs into the portal, the first user is automatically logged out.

To log into the Office Administrator Portal, follow these steps:

1. Obtain a user name, password, and URL for the Office Administrator Portal from your service provider.
2. Open a Web browser on your computer. Microsoft Internet Explorer version 5.0 and Netscape Navigator 6.0 (and more recent versions) are supported. You may experience display problems with older browsers.
3. Enter the URL for the Office Administrator Portal, specified by your service provider. The **Management Portal Login** page opens.
4. Enter the user name and password provided by your service provider.
5. If you want to know more about the portal or how to login, click the question mark
6. If you forgot your password and you have set a hint and answer, click the **[click here](#)** link and follow the instructions in Resetting Your Password From the **Login** Page.
7. Click **Login**.



Understanding the Employees Page

The **Employees** page provides access to the functions you will need to access most often, such as:

- Adding an employee.
- Moving an employee or changing an employee's extension.
- Resetting employee passwords.
- Viewing your list of employees.

The **Employees** page lets you manage all of the employee-related information for your hosted telephone services.

Employees	Contacts	Set Up	Reports	Support
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Find an Employee:

All	1 2 3	A - D	E - H	I - L
Name	Number / Ext.		Ac	
<i>Click to edit.</i>				
Admin, Admin	4083283453 / 3453		Re	
Alg, Brian	4083285904 / 5904		Re	

Adding a New Employee

To add a new employee, follow these steps:

1. From the **Employees** page, click **New**.

General	Home Address	Phone Number
Name: *	<input type="text" value="Luellen"/>	<input type="text" value="Vernon"/>
Login Name	Login Name defaults to [tenant]	
Title:	<input type="text" value="Marketing Manager"/>	
Company:	<input type="text" value="Safeway"/>	
Department:	<input type="text"/>	
Work Address:	<input type="text"/>	

2. Fill in the form with the appropriate information and note the following:
 - Enter a 4-digit unique extension number in the **Work Extension** field. This is an internal extension number and is typically the same as the last four digits of the public phone number, but can be any number you choose.
Caution: Make sure the extension number you enter does not begin with a 9.
 - Select a phone number from the **Work Phone** drop-down list if you want this employee's telephone to be directly accessible from the outside. Otherwise, select **UNASSIGNED** from the drop-down list. The 10-digit Work Phone selection is optional.



- If you enter an e-mail address for the employee, their login and password are automatically sent to them in a Welcome e-mail.
- Enter a SIP (Session Initiation Protocol) alias for the employee (optional). This alias should be in the same format as the user's e-mail address without the domain name that appears after the @ sign, such as *joe.smith*.
- The SIP alias lets users dial this employee using the alias you enter, but only if you have a SIP-based network. For more information, contact your service provider.
- The required fields are displayed in red.

1. Click the **Home Address** tab.

The **Home Address** tab opens.

General	Home Address	Phone Numbers
Home Address:	<input type="text"/> <input type="text"/>	
City:	<input type="text"/>	
State/Province:	<input type="text"/>	
ZIP/Postal Code:	<input type="text"/>	
Notes:	<input type="text"/>	

2. If available, enter the employee's home address information.

Tip: Use the **Notes** field to enter additional information about this employee. The information you enter will be visible to your employees through their User Portal.

3. Click the **Phone Numbers** tab.

The **Phone Numbers** tab opens.

General	Home Address	Phone Numbers	Phone
Home Numbers:	<input type="text"/>	#1 <input type="text"/>	#2 <input type="text"/>
Custom Numbers:	<input type="text"/>	#1 <input type="text"/>	#2 <input type="text"/>
Mobile:	<input type="text"/>		
Pager w/Email:	<input type="text"/>		

4. Enter the employee's home phone numbers, mobile phone number, e-mail pager, and home e-mail address, if available. An e-mail pager accepts text messages and is accessed using an e-mail address. This information is published to the directory so that your employees can easily customize their telephone services.

5. Select the digital, IP, or analog phone template for this employee using the **Use Template** drop-down list.

Note: If you need to assign an IP phone template to an employee and the **Use Template** drop-down list does not show a listing for your type of IP phone, you need to create a template for your IP phone type before you can assign a template to this employee.



The system defaults to an analog telephone template. If your employee actually has a digital or IP telephone and you do not change the default setting, the image on the **My Phone** page shows an analog telephone for this employee. Employees do not have the ability to change their own telephone template.

6. Click the **Settings** tab.

The **Settings** tab opens.

The screenshot shows a web interface with a purple header bar containing four tabs: 'Home Address', 'Phone Numbers', 'Phone', and 'Settings'. The 'Settings' tab is highlighted in yellow. Below the tabs, there are several form fields and radio buttons. Visible labels include 'Yes', 'Services:', 'Features:', 'Privileges:', and a dropdown menu currently set to 'Local, Long Distance and Intl'.

7. Select the modules, calling privileges, services, and favorites options for the employee by selecting from each of the drop-down lists as described in the following table.

Option	Description
Use Calling Privileges	Sets the calling policy for this employee's telephone. For a description of the types of calls allowed for each calling privilege, go to Configuring Calling Policies.
Add to Hunt Groups	Adds this employee to one or more hunt groups created for your company. Hunt groups are used to route incoming calls so the caller is connected with a real person. Go to Adding an Employee to a Hunt Group for more information.
Personal Locator	Lets this employee use the Personal Locator features. With Personal Locator, you can customize call treatments, add personal contacts, use caller ID, and create call treatments for groups of callers. Your options are Yes or No .
Mobile Office	Lets this employee use the Mobile Office features. With Mobile Office, you can use your call settings and directories from any WAP-enabled telephone, such as your cell phone. Your options are Yes or No .
Enable Voicemail	Specifies whether or not this employee or room extension has access to voicemail.
Voicemail Number	Specifies the voicemail extension that the employee dials to retrieve voicemail messages. There is usually a single voicemail access number for everyone in your company.
Enable Remote Calling	Lets this employee use the Remote Calling (Remote Instant Office) feature. With Remote Calling, you can log into your portal and place calls from most locations as if you were in your office. This feature is useful for traveling employees, telecommuters, and employees at satellite locations. This feature does not work if the phone you are at is behind a hotel exchange, PBX, or key system.
Block Caller ID	Lets you deny caller ID information on outgoing calls for the selected employee. Your options are Yes or No . If you select Yes , the employee does not display their own caller ID information on outgoing calls. If you select No , the employee displays their own caller ID information to outside callers.
Add as Company Favorite/Speed Dial	Adds this employee to your company Favorites list and assigns the selected speed dial code to this employee. The company favorites can be viewed on your user's Home and Contacts pages. Users can initiate a call to this employee using the click-to-call feature from the browser or by pressing the speed dial keys on their telephones.



Adding a Lobby or Conference Room Phone

If your company has shared phones that are not assigned to specific employees, such as a lobby or conference room phone, you can add these phones to the system in the same way you would add an employee.

To add a lobby or conference room phone, follow these steps:

1. From the **Employees** page, click **New**.

The **Add Employees** page opens with the **General** tab selected.

2. Follow the instructions for adding an employee. When adding your lobby or conference room phone, note the following:
 - You do not need to enter information in the **Home Address** and **Phone Numbers** tabs. These tabs are for employee phones only.
 - All names are displayed in the Portal and on the telephone as last name, first name so keep that in mind when you are adding your lobby or conference room phone. For example, if you want the display to show Conference Room1, you must enter *Room1* as the first name and *Conference* as the last name.
 - When configuring the parameters in the **Settings** tab, you might want to disable the Personal Locator and Mobile Office modules as well as voicemail.

Using the Telephones

In the Setup wizard or the **Employees** page you logically associated users with extension numbers. In this section you must associate the extension with a telephone. For example, if you assigned Joe Jacobs to extension 2310, you must associate Joe's phone with that extension number.

To assign extension numbers to telephones directly on each phone, follow these steps:

1. Go to the first telephone that you want to assign to an extension number and go off hook (that is, lift the receiver or press the **Spkr** button).
2. Enter the following numeric series: *51, tenant reg code, tenant password, extension number.

Your tenant reg code and registration password are initially supplied by your service provider. If you do not know these numbers, contact your service provider or use the Office Administrator Portal to assign extension numbers as described below.

*Note: You can change your registration password at any time using the **Reset Password** page.*

3. Repeat these steps for each telephone (adapter port) that you want to assign an extension to.



Using the Office Administrator Portal

To use the Office Administrator Portal to assign extension numbers to telephones, follow these steps:

1. Click the name of an employee in the **Employees** page of the Office Administrator Portal.

The **Edit Employee** page opens.

2. Click the **Phone** tab.

General Home Address Phone Numbers **Phone** Se

Note: This phone template may have been changed by the user. To overwrite the original default and the user's edits, select a new template and click Assign New Template.

Use Template: Default-Analog Assign Template

Phone Location: d001@10.10.10.187

3. Use the **Phone Location** drop-down list to assign a physical adapter or IP phone port to this extension.

You will need a port assignment diagram to know which adapter port numbers correspond to which telephone locations. Or, you can see if the phone jacks for each telephone are labeled.

Tip: The Office Administrator Portal lists adapter ports in a different format than IP phone ports. IP phones only have one port and appear as port#@IPaddress. For example, d001@172.16.129.91 signifies that the port belongs to an IP phone. However, adapter ports appear as port#@serialnumber. For example, d020@0001-2332-1677-7033 signifies that port 20 belongs to an adapter.

4. Click **Update**.



Resetting an Employee's Password

To reset an employee's password, follow these steps:

1. From the **Employees** page, locate the entry for a specific employee.
2. Click the **Reset Password** link next to the employee extension.

The **Reset Password** page opens and the new password is displayed.

Reset Password

Login Name:	40832859002154
Password:	<input type="text" value="kl6850pd"/>
Email employee with new information?	<input type="button" value="Yes"/>

3. Send an e-mail to the employee with their new password automatically by selecting **Yes** from the **Options** drop-down list.
4. Click **Save**.



Moving an Employee's Extension

1. You must first unassign the current extension assigned to the port the employee is moving to. So, from the **Employees** page, locate the entry for a specific employee.
2. Click the **Move Extension** link next to the employee's extension number.
3. Select **Not Assigned** from the **New Location** drop-down list and click **Save**.
4. Click **Move Extension** next to the extension number for the employee you are moving.
5. Select a new port location for the employee from the **New Location** drop-down list and click **Save**.
6. Click the **Move Extension** link next to the original employee extension number.
7. Select a new adapter location for the first employee from the **New Location** drop-down list and click **Save**.



Adding an Employee to a Hunt Group

To add an employee to a hunt group that has already been defined, follow these steps:

1. From the **Employees** page, click **New** if you are adding a new employee, or click an existing employee's name to edit that employee's settings.
2. Click the **Settings** tab.
3. Click **Select** in the **Add to Hunt Groups** field.
4. Select the check box next to each of the hunt groups you want associated with the current employee and extension.
5. Click **Save**.



Changing Employee Information

You can edit the information previously entered for any employee by clicking the name of the employee. Although you may have entered employee information using the Setup wizard, you can set many more parameters for each employee from the Employees page, including:

- E-mail address
- Home address
- Home, mobile, e-mail pager telephone numbers and home e-mail address
- Port to which the employee is connected
- Calling privileges for local, long distance, 900/976, and international calls
- Hunt group membership
- Caller ID blocking
- Company favorite and speed dial code settings

Open the **New Employee** page. It displays the current employee information. You can edit the information on each tab as described in Adding a New Employee. When you are finished, click **Save**.



Creating a New Company Contact

Before you and your employees can use the company contacts, you must create new contacts by clicking the **New** button on the **Contacts** page. The system allows you to create up to 100 company contacts.

To add a contact, follow these steps:

1. From the **Contacts** page, click **New**.
2. Enter the contact name, title, company, work address, work phone, fax, and e-mail address.

*Tip: You can use the **Notes** field (under the **Home Address** tab) to enter additional information about this contact. The information you enter will be visible to your employees through their User Portal.*

When entering phone numbers:

- Do not include a prefix, such as the number 1 for out-of-area calls or the number 9 for an outside line
 - Do not include an area code for local numbers
3. Click **Save** if you are finished entering all of the contact information.
 4. Click the **Home Address** tab.
 5. Enter the home address for this contact.
 6. Click the **Phone Numbers** tab.
 7. Enter the home, custom, and mobile phone numbers for this contact, if available. You can also enter the number for an e-mail pager and the contact's home e-mail address.
 8. Click the **Settings** tab.
 9. Using the drop-down list, you can add this contact as a company favorite by selecting the speed dial code (number) you want to use for this contact.
 10. Click **Save**.



Deleting a Company Contact

You can delete a contact from the company **Contacts** list.

To delete a contact, follow these steps:

1. Edit the contact information by clicking the name of the contact on the **Contacts** page.
2. Click **Delete**.

Click **Yes** to delete the selected contact.



Configuring Hunt Groups

You can create hunt groups that direct incoming calls to a group of users in series. The first number in the hunt group rings when a call comes into the hunt group telephone number. If there is no answer at the first extension, the next extension rings. The incoming call rings all extensions in the hunt group until it is answered or forwarded to voicemail.

To create a hunt group, follow these steps:

1. Click **Set Up** in the navigation bar.
2. Click the **Hunt Groups** tab on the **Set Up** page.

Name:	<input type="text" value="Hunt Gropu Alpha"/>
Description:	<input type="text" value="Level 4"/>
Extension:	<input type="text" value="4522"/>
Final Destination:	<input type="text" value="408-566-8661"/>
Phone Number:	<input type="text" value="408-328-3412"/>

3. Click **New** to create a new hunt group.

Name:	<input type="text" value="Hunt Gropu Alpha"/>
Description:	<input type="text" value="Level 4"/>
Extension:	<input type="text" value="4522"/>
Final Destination:	<input type="text" value="408-566-8661"/>
Phone Number:	<input type="text" value="408-328-3412"/>

4. Enter the name of the hunt group in the **Name** field.
5. Enter a description of the hunt group in the **Description** field.
6. Enter an internal extension number that you want to be the start of the hunt group in the **Extension** field.
7. Each hunt group must be assigned a unique starting extension and the extension cannot begin with 9.
8. Enter the final destination for a caller to the hunt group if no one answers, in the **Final Destination** field. A common final destination number would be a voicemail extension.
9. Select the telephone number that initiates the hunt group from the **Phone Number** drop-down list.
10. Each hunt group must have a unique starting number. This is the number you will give callers so they can enter the group to ensure their call is answered by a real person.
11. Click **Save**.



12. Click the name of a hunt group in the list to edit the extensions in the group.

[update](#) [delete](#) [members](#) [answer order](#) [cancel](#)

Name:	Hunt Group Charlie
Description:	Path 1 for Mary Alice
Ext:	8935
Phone Number:	408-328-3457
Final Destination:	685-212-3500

13. Click **Members** to add extensions to this hunt group.

[update](#) [cancel](#)

	Name	Phone Number/Ext
<input type="checkbox"/>	Machine, Fax by Carol	4083283455 / 2154
<input type="checkbox"/>	Strongman, Merry	4083283411 / 3411
<input type="checkbox"/>	Gongon, Gerald	4083283415 / 3415

14. Select the check box next to the name of each employee you want associated with this hunt group. Then, click **Update**.

15. On the Edit **Hunt Group** page, click **Answer Order** to specify the order in which the hunt group extensions ring.

[save](#) [cancel](#)

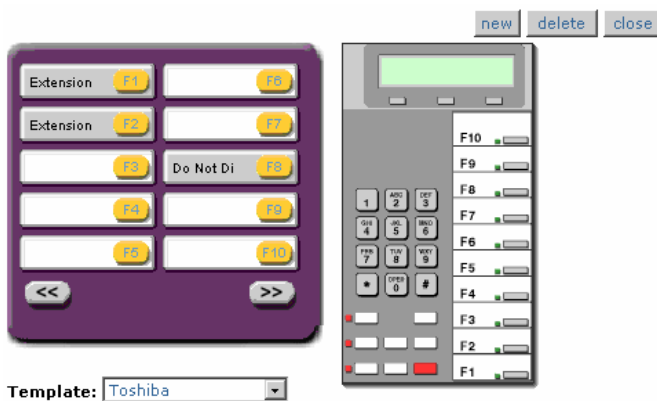
	Name	Phone Number/Ext.
#1	Bigallo, Brian	4083283416 / 3416
#2	Moose, Bullwinkle	4083283452 / 3452
#3	Repino, Philip	4083285905 / 5905
#4	Niceman, Noel	4083285902 / 5902

Setting Your Telephone Template

The company-wide telephone template lets you define the type of telephone used by your company and lets you predefine the feature or speed dial function of one or more of the programmable buttons on your telephones.

To set or change the telephone template for your company, follow these steps:

1. From the **Set Up** page, click the **Phones** tab.
2. Click **Edit Templates** to select the default telephone template. For example, you can assign feature buttons on a digital telephone that will serve as default feature buttons assignments for your employees.



3. Use the **Template** drop-down list to select an existing template.
4. For digital and IP telephones, you can assign default programmable feature buttons as follows:
 - Click the first programmable feature button you want to assign.
 - To assign a phone number to a feature button, (1) enter the feature button name in the **Label** field, (2) enter the telephone number in the **Phone #** field, and (3) click the **Assign** button below the **Phone #** field.
 - To assign a feature to the feature button, select a feature from the **Feature** drop-down list and click the **Assign** button below the drop-down list.
5. Click the **Lock Key** check box if you want to lock this feature button assignment so that your users cannot change it.
6. Click **Close** to close the **Edit Phone Templates** page.

The buttons you have preassigned are grayed out and the speed dial number or feature is shown in each employee's **My Phone** page.



Changing Company Information

You can use the **Company Info** and **Billing Address** tabs on the **Support** page of the Office Administrator Portal to view and change any of the company information you input as part of the Setup wizard. This information includes the company name, address, contact person, billing address, billing contacts, and passwords.

To change your company information, follow these steps:

1. Login to the Office Administrator Portal using your office administrator user name and password.
2. Click the **Support** tab.
3. Click the **Company Info** tab to display the company information you already input.

From this tab you can change your company name, address, telephone number, contact information, or your passwords. When you have finished, click **Save Changes**.



Resetting Your Passwords From the Support Page

You can reset your login password or your telephone registration password using the **Reset Password** tab on the **Support** page. You can also use this tab to set your hint and answer that can be used to identify you if you forget your password. The hint and answer should be set the first time you log into the portal, as described in Logging Into the Management Portal.

To reset any of your passwords, follow these steps:

1. From the Company Info tab, click Reset Password.
2. To ensure that you will be able to change your password if you forget it, select a hint question from the **Hint** drop-down box.
3. Enter your answer to the hint question in the **Answer** field and click **Update**.
4. If you have not changed any of the other passwords, messages remind you. Click **OK** on all of the messages. A confirmation message displays.
5. Click **Update** on the **Company Info** tab.



Entering Billing Information

You can enter billing information using the **Billing Address** tab on the **Company** page.

To enter your billing information, follow these steps:

1. Click the **Billing Address** tab on the **Support** page.
2. Select the **Same as Company Address** check box if your billing address is the same as the one you entered for your company. If the billing address is different, enter your billing address in the fields provided.



Account Information

You can use the **Billing** tab on the **Reports** page to view the tenant account information. This information includes the account name, number, status, currency in which it is tabulated, billing cycle detail, and the balance.

To view the account information, click the **Billing** tab on the **Reports** page.

To make changes to the account information, go to the **Change Account Info** page.



Invoice

You can view and print the invoice for the service. The information provided includes the date span of the invoice, invoice and account numbers, previous balance, payments and adjustment, usage plan charges, monthly service charges and usage-call details.

To view the invoice, proceed as follows:

1. Click the **Billing** tab on the **Reports** page.
2. On the **Account Information** page, click the **Invoice** tab.



Account Activity

You can view the tenant-account activity for each active month of service. The information provided includes monthly tabulations of date, time, events, resources and cost.

To view the account activity for a particular month, proceed as follows:

1. Click the **Billing** tab on the **Reports** page.
2. On the **Account Information** page, click **Account Activity** tab.



Products Used

You can view the products that were purchase and used. The information provided includes the name of the overall service, product name, status, type of service, service type, date of purchase, when it was started, and the usage.

To view the product information, proceed as follows:

1. Click the **Billing** tab on the **Reports** page.
2. On the **Account Information** page, click **Products** tab.