# CommPortal
## User Guide

**MOMENTUM**
T E L E C O M

Powered by: **metaswitch**

*MaX UC*

# Notices

# Contents

# 1 Introduction

This manual describes CommPortal, a web interface that allows your subscribers to manage their calls and call services using a browser.

## 1.1 About This Manual

This manual contains the following chapters that describe the different features of the CommPortal UI.

- CommPortal Overview on page 8 provides an overview of the CommPortal UI and the key concepts associated with it, including a description of how subscribers and service provider administrators log in to the CommPortal Interface.
- Features for subscribers on page 18 describes the features and services provided to subscribers using the CommPortal UI, along with sections describing specific features or differences for MaX UC Desktop, Teen Line, Business Group line and PBX subscribers.
- Features for BG Administrators on page 47 describes the interface used by Business Group Administrators. (The current version of CommPortal does not support Business Group administrators managing PBXs through this interface.)
- Features for PBX Administrators on page 84 describes the interface that can be used by an administrator of a PBX.
- Features for Easy Attendant and Premium Attendant Lines on page 87 describes the interfaces used by subscribers to manage the Easy Attendant and Premium Attendant services.
- SIP Phone Applications on page 100 describes the SIP Phone Applications that you may be using in your deployment to provide access to CommPortal function on SIP devices.

The following appendices contain material on various features available as part of CommPortal that you might want to use as the basis for providing information for your subscribers.

- Appendix: CommPortal Assistant on page 105 describes how to use CommPortal Assistant.
- Appendix: Using Call Me on page 125 describes how to use Call Me buttons.
- Appendix: MaX UC Desktop on page 131 describes the end-user material provided with MaX UC Desktop, a soft client available for use on Windows and Mac computers. Note that MaX UC Desktop is the new name for Accession Desktop from V2.31.
- Appendix: MaX UC Mobile on page 132 describes the end-user material provided with MaX UC Mobile, a soft client available for use on iPhone, iPad and Android mobile devices. Note that MaX UC Mobile is the new name for Accession Mobile from V2.31.
- Appendix: MaX Meeting on page 133 describes the end-user material provided with MaX Meeting, a web conferencing client that can be deployed as part of a MaX UC Client deployment or as a standalone application.

Alongside this manual, the *Learn How To Deploy CommPortal And The MaX UC Clients* guide provides simple, step-by-step instructions and numerous screenshots to assist you to commission,

install and deploy the CommPortal and MaX UC Client applications. You can download this guide on the Metaswitch Manuals site.

## 1.2 About the CommPortal screen shots

This *CommPortal Guide* describes the features presented to subscribers and administrators by the CommPortal web UI.

The screenshots in the main body of the *CommPortal Guide* are from the new standard default web UI introduced in MetaSphere EAS v9.3.20. This is a brand-neutral UI without logos or branding, and is available in US English (as shown in this manual), plus any additional languages you have installed via an EAS language pack (including UK English, Canadian French and Latin American Spanish variants). If you customize the CommPortal UI to use your own company branding, your subscribers will obviously see a different style of UI.

The screenshots show the standard default web UI as it appears for a subscriber with a full set of MetaSphere Call Feature Server (CFS) and MetaSphere EAS call services. However, your subscribers may have not have access to all these features. For example, subscribers hosted on a legacy telephony switch will not see any tabs for CFS call services.

If you are continuing to use the default CommPortal UIs available prior to MetaSphere EAS v9.3.20, you should refer to an earlier version of this *CommPortal Guide*.

# 2 CommPortal Overview

CommPortal is an advanced web-based self-care interface which allows subscribers to view and manage the configuration of their MetaSphere account. When combined in a deployment with a MetaSphere CFS, CommPortal also allows subscribers to manage their own CFS call services through an integrated online interface.

CommPortal can also be used by administrators to view and update subscribers' accounts. There are specific CommPortal UIs for different types of subscriber and administrator and these are described in this manual.

- Features for subscribers on page 18 describes the features of the CommPortal UI seen by individual subscribers.
- Features for BG Administrators on page 47 describes the features available to Business Group Administrators.
- Features for PBX Administrators on page 84 describes the features available to PBX Administrators if you choose to enable the customized PBX Administrator UI.

  These administrators can also use the CommPortal UI for an individual line to manage their PBX, but will obviously only be able to configure the settings available on a PBX, so not all the features described in Features for subscribers on page 18 will be relevant.

- Features for Easy Attendant and Premium Attendant Lines on page 87 describes the CommPortal UI available to Easy Attendant and Premium Attendant subscribers that allows them to set up their call handling menus and schedules.

The CommPortal UI can be branded to include your company's logo and colors, and can also be integrated within your own website. You can either purchase a tailored branding of CommPortal from Metaswitch Professional Services, or if you have the expertise, create your own. You should refer to the *MetaSphere EAS & CommPortal Customization and Branding Guide* for more information on the various options for deploying and customizing the CommPortal Web UIs.

## 2.1 Interface Overview

CommPortal is the main web-based interface your subscribers will use to access their account using a browser. Subscribers can use CommPortal to control their Call Manager settings, listen to their voicemails, and configure all the features associated with their account. Your BG administrators will also use a CommPortal interface to manage the lines and services in their Business Group, and can also click through to see the CommPortal UI for an individual Business Group line.

On accessing CommPortal, subscribers see the following Home page. The CommPortal Home page automatically displays the subscriber's Call Manager service as well as links to all their other services. The options displayed are controlled by the subscriber's Class of Service and any customization that you may carry out on the default UI. The following screenshot shows a subscriber with Easy Call Manager and a full set of CommPortal features.
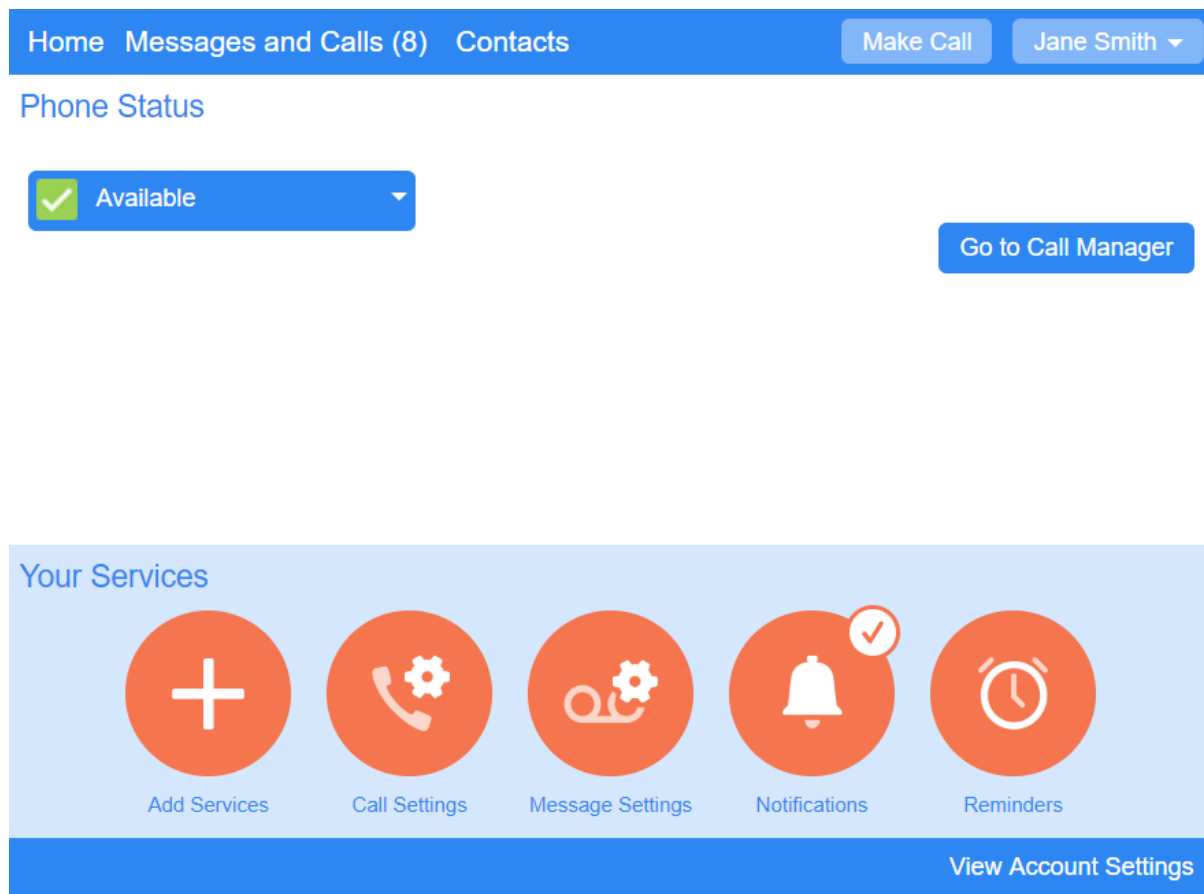
**Figure 1: CommPortal UI Home Page**

Subscribers can click the text links in the top and bottom ribbons and the orange icons to launch new pages where they can view and manage the other features of their CommPortal account. Some of the orange icons display information about that service at the top right of the icon - for example a tick shows that a service has been enabled, a number is a count of the particular item, and ⌖ indicates that the subscriber will leave the CommPortal UI when clicking this icon. For a detailed description of the options on the Home page, see CommPortal Subscriber Home page on page 18.

Any changes made using CommPortal are immediately reflected in the MetaSphere TUI (the Telephone User Interface subscribers can also use to access and manage their account). For example, if a subscriber deletes any messages, they will no longer be available through the TUI.

## 2.2 Browser and Operating System support

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

Some of the additional features available with CommPortal may be restricted in some browsers or operating systems. For details of browser compatibility, see the CommPortal Releases space on the Metaswitch Support Community (https://communities.metaswitch.com/community/support/product_information/release-information).

## WebRTC and Flash

CommPortal allows subscribers to record new voicemails, greetings and reminders, and to add introductory messages to voicemails they are forwarding.

Where browsers support it, CommPortal uses a WebRTC component to play and record this audio. Some browsers, for example Internet Explorer, do not currently support this WebRTC function and instead use Adobe Flash. If you, or your subscribers, are using a browser that does not support the CommPortal WebRTC function, you will need to install the Flash plug-in.

### Installing the Adobe Flash plug-in

**Note:**

This procedure is only required if you are using a browser that does not support WebRTC.

You must use Version 10 or later of the Adobe Flash plug-in. CommPortal provides a link to a free download of the Flash plug-in from Adobe's website (which may require administrator privileges to install). If possible, you should use a computer running a Microsoft Windows OS to make your recordings, rather than one running a Mac OS. This is due to the limitations of the Flash plug-in when running on a Mac OS. If you can only use a Mac, you should refer to the article entitled *Using RTMP to record audio in CommPortal* on the Metaswitch Support Community (http://communities.metaswitch.com) for a workaround that addresses these limitations.

The recording function requires access to the user's microphone, and Flash will query the user (using its own UI) to confirm that they allow this. By default, Flash does this every time the user attempts to start a recording, but it provides an option to permanently enable access to the microphone.

You should also ensure that the CommPortal website is in your subscribers' Internet security zone, with default (Medium) security settings. For users experienced in configuring browser security, the specific settings required are to enable JavaScript and ActiveX "Binary and Script behaviors". See for more information on logging in to CommPortal.

## 2.3 Privacy

As your subscribers use the CommPortal UI, some of their actions are recorded in the web access logs. This is part of the normal operation of the web server and is common with all websites.

In addition, the CommPortal client passes additional usage data to the server, which may be used to help understand users' behavior and improve the CommPortal UI in future. This information, known as **CommPortal Analytics**, is stored on your own CommPortal server and is not transmitted to Metaswitch.

If you wish to disable or modify CommPortal Analytics, you can do so as part of the customization process described in the *EAS & CommPortal Customization and Branding Guide*.

## 2.4 Customization

CommPortal is delivered with a default web UI as part of the MetaSphere EAS code. This CommPortal UI is brand-neutral, without logos or product name branding.

The default CommPortal UI is provided in US English. You can support additional languages, including UK English, Canadian French and Latin American Spanish, by installing the relevant EAS language pack. Each language pack includes a default CommPortal UI in that language.

You can use the default CommPortal UI without making any changes to it, or customize it for your environment. It is possible to completely change the appearance of the CommPortal interface to match your brand identity, changing the colors used, the text, images and so on. You can also embed CommPortal within your own website or provide single sign-on from your main site to CommPortal. You can even incorporate features of the CommPortal interface within your own website, or use the underlying MetaSphere EAS servers to create your own features.

All these options, and further detail about what you can customize and brand in CommPortal and the other MetaSphere User Interfaces, can be found in the *MetaSphere EAS & CommPortal Customization and Branding Guide*, available on the Metaswitch Support Community (https://communities.metaswitch.com/manuals/latestindex/3144).

## 2.5 Logging in to CommPortal

You can provide different ways for subscribers and administrators to log on to CommPortal, and can also control the editing privileges that administrators have once they have logged on to one of your CommPortal UIs.

See the following documents for more information.

- Subscriber access on page 11
- CommPortal Initialization Wizard on page 13
- Password validity checks on page 14
- Password expiry on page 15
- Validate cookies on page 16
- Administrator access on page 16

### 2.5.1 Subscriber Access

Subscribers log in to CommPortal in one of the following ways.

- Subscribers can use a **CommPortal login URL** to navigate to the login page, and enter their telephone number (main or additional number) followed by their CommPortal password. From MetaSphere EAS V9.5.20, subscribers can also configure an account email address and use that instead of their telephone number to log in, unless you choose to disable this feature.

  - On first-time login, whenever a password has been changed by an administrator or if a password has expired, subscribers are forced to change their password.

- A subscriber will be locked out of their account for a period of time if they repeatedly enter the wrong password. A system administrator can unlock an account using MetaView Web, or the subscriber must wait until the lockout period has expired before attempting to log in again.

    - By default, MetaSphere EAS includes a **Reset password** link on the CommPortal login screen. If it was not configured when the subscriber was provisioned, subscribers are prompted to enter an email address when they first log in to CommPortal. This email address is then used for notification emails sent by MetaSphere EAS every time a subscriber changes their voicemail PIN, CommPortal password or email address, or for password reset emails sent if a subscriber clicks the **Reset password** link on the CommPortal login page.

        This feature can be enabled or disabled using the craft interface, as described in How to configure CommPortal password reset and security notifications in the *MetaSphere EAS & CommPortal Operational Procedures Guide* on the Metaswitch Support Community. However, we strongly recommend that you do not disable it so that subscribers are able to use it to change their own passwords.

- If you are in a region where telephone numbers are changing as a result of an Area Code Split (ACS), your subscribers should log in using their telephone number with the old area code up to the point at which the ACS change has been made. After the ACS change, they should always use the new area code. In an ACS, subscribers can continue to log in with their account email, if email login has been enabled.

- Alternatively, you can set up your MetaSphere deployment so that your subscribers can **log in to CommPortal directly from your existing customer portal**, without needing to log in separately or enter a CommPortal password. Integration with your own website is discussed in the *MetaSphere EAS & CommPortal Customization and Branding Guide*.

- Subscribers can also log in to their account by following **action links** contained in emails sent as part of CommPortal's auto-forward messages feature.

    If the subscriber chooses to log in to CommPortal by clicking the appropriate action link, they will see a similar login screen to before, but the email/number field will be grayed out. They will still have to enter their CommPortal password.

    They will also be given the option (for all action links, including mark as read and delete message) to have their details saved. This stores a cookie on their computer and it means that next time they click on the action link they will not have to enter their password to carry out the selected action.

Once a subscriber has logged in, they can choose whether they want to change settings for any additional devices or secondary subscribers, as available, using the drop-down menu at the top right of each CommPortal screen. By default, this will allow a primary subscriber access to the messages and faxes of secondary subscribers on a teen line. You can customize the access behavior to prevent this by following the instructions in the MetaSphere EAS *Customization and Branding Guide*.

### Remember Me Feature

If you have enabled the feature in your CommPortal customization, subscribers can opt to tick the **Remember me on this computer** check box on the login page. This will save the subscriber's login details such that when they next use CommPortal, they will not have to log in.

## CommPortal Web

Please log in below.

Email / Number:

Password:

Reset Password

☐ Remember me on this computer.

Login

**Figure 2: CommPortal Login page showing Remember Me check box.**

**Note:**

The **Remember me on this computer** checkbox will only appear on the login screen if you have configured this in your CommPortal customization. Instructions on how to do this are in *Changing text* in the *MetaSphere EAS & CommPortal Customization and Branding Guide* on the Metaswitch Support Community (https://communities.metaswitch.com/manuals/latestsection/1090007259).

The subscriber's Remember Me preference is stored on a per-computer basis. Unless a subscriber who has configured the Remember Me preference on their computer explicitly logs out of CommPortal at the end of their session, anyone who subsequently uses that computer can log in to the subscriber's CommPortal account.

To help ensure that subscribers' accounts are kept secure, you should encourage subscribers to use the feature only on their personal computers and not on public computers (for example, in an internet cafe), and to log out of CommPortal rather than just closing their web browser application if they are sharing their personal computers with other users.

## 2.5.2 CommPortal Initialization Wizard

You can use a Class of Service option to present new subscribers with the CommPortal Initialization Wizard the first time they attempt to log in to CommPortal.
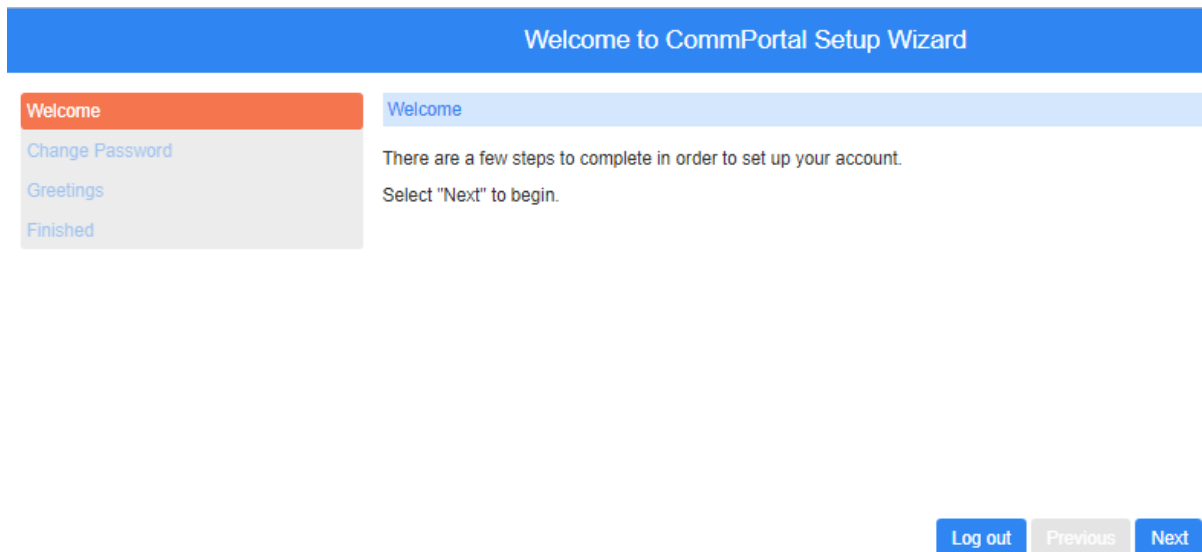
**Figure 3: CommPortal Initialization Wizard**

This wizard will guide the subscriber through the setup process, prompting them to update their password and, if the feature is enabled on your deployment, configure an email address before they can access their CommPortal account. This email address is used for notification emails sent by MetaSphere EAS every time a subscriber changes their MetaSphere EAS voicemail PIN, CommPortal password or the email address, or for password reset emails sent if a subscriber clicks the reset password link on the CommPortal login page. From MetaSphere EAS V9.5.20, subscribers can choose to use this email address to log in to their account by ticking an **Allow email login** checkbox on the **Change Password** screen.

If the subscriber has access to MetaSphere EAS Voicemail or Unified Messaging, the wizard will also prompt them to update their PIN and record their name and a default greeting which will be played each time a caller accesses their mailbox to leave a message. The PIN must be updated, but the subscriber can choose to skip the recordings and return to them at a later date.

These initialization steps can also be carried out through the TUI. If the subscriber has already completed any of these steps using the TUI, they will not be asked by the wizard to carry them out again.

> **Note:**
>
> This wizard is only shown to subscribers logging in to an individual line. It is not shown to Business Group Administrators when logging in through the Business Group Administrator page or into an individual Business Group line, or to administrators initiating connections from MetaView Web.

## 2.5.3 Password Validity Checks

You can use Class of Service options to perform validity checks on the PIN and/or password that your subscribers use to access CommPortal (and the TUI) to prevent the use of PINs or passwords that could easily be guessed by someone else.

When you create new subscribers, or when they subsequently change their PIN or password, MetaSphere EAS will reject any that

- are not of the permitted length
- contain all of the subscriber's telephone or extension number, or any other mailbox number associated with the account
- consist entirely of part of the subscriber's telephone or extension number, or any other mailbox number associated with the account
- (*from MetaSphere EAS V9.5.20*) include the whole of the configured account email address that can be used for email-based login to CommPortal or where the whole of the password is included in the email address
- use an ascending or descending series of numbers
- have single digits or characters repeated more than a specified number of times in a row
- contain fewer digits than a specified minimum
- contain fewer letters than a specified minimum
- contain fewer special characters than a specified minimum.

You can configure your Classes of Service to perform all, or just a subset, of these validity checks. The telephone number check and the ascending or descending series check will only apply to passwords that consist solely of numeric digits.

In addition to these Class of Service options, CommPortal will prevent subscribers from changing their password to the same value as the current one.

## 2.5.4 Password Expiry

You can use a Class of Service option to set a password expiry time that forces your subscribers to change the password they use for their CommPortal login periodically. When a user next attempts to log in after their password has expired, they will be prompted to change it. The default Classes of Service are configured to use password expiry. You can also configure your deployment to lock accounts if a subscriber fails to update an expired CommPortal password within a specified expired password grace period.

The new password must comply with the validity checks that may be imposed by the subscriber's Class of Service, as described in Password validity checks on page 14. If the new password fails one or more of these checks, CommPortal will display an error message explaining why the new password cannot be used, and the subscriber must then repeat the process with an alternative password.

If you are deploying SIP phone applications, described in SIP Phone Applications on page 100, due to firmware limitations on Aastra and Polycom desk phones, your subscribers cannot use the 'bracket' characters `(){}[]` in their CommPortal passwords because there is no way of entering these when logging on to the SIP phone.

Password expiry only applies to the CommPortal web interface and does not affect login to other CommPortal products, for example CommPortal Assistant, Mobile Applications, SIP Phone Applications, or Call Me Buttons. However, when a user has changed their CommPortal password,

they will also need to (and will be prompted to) re-enter this new password when they next use the other CommPortal UIs.

To enable password expiry, you must give your users a Class of Service with the password expiry option set to an appropriate time period, as described in the *MetaSphere EAS & CommPortal Subscriber Administration Guide.*

## 2.5.5 Validate Cookies

When users first login to CommPortal Web, you can choose to display a pop-up notice explaining what cookies are and how they are used on the site. Users will be prompted to agree to the use of cookies. If they reject the use of cookies, they will be logged out from CommPortal Web.

To enable the cookie pop-up notice, refer to the *Validating the use of cookies* section of the *MetaSphere EAS & CommPortal Customization and Branding Guide* on the Metaswitch Support Community (.https://communities.metaswitch.com/manuals/latestsection/1090007243).

## 2.5.6 Administrator Access

Service Provider administrators and customer support representatives can also log into subscribers' CommPortal accounts, for example to troubleshoot problems, by following links in the subscribers' pages in MetaView Web.

You can control the viewing and editing privileges your administrators have when logging on to a subscriber's account in this way. For example, you can set up administrators who can only view subscriber accounts, and others who can edit existing subscribers and create new ones.

The following aspects of the CommPortal interface can be independently configured to be accessible or inaccessible to administrators.

- Viewing self-care settings, including greetings, Find Me Follow Me, Reminders, Easy Attendant and Premium Attendant.
- Modifying self-care settings, including greetings, Find Me Follow Me, Reminders, Easy Attendant and Premium Attendant.
- Resetting passwords or PINs.
- Creating new subscriber accounts.
- Composing, replying to or forwarding voicemails.
- Forwarding faxes.

For more information on how to configure administrator access, see *Configuring Administrator login to CommPortal and the SIP Provisioning Server from MetaView Web* in the *MetaSphere EAS & CommPortal Operational Procedures Guide* on the Metaswitch Support Community (https://communities.metaswitch.com/manuals/latestsection/1090007688).

## 2.6 Sending Feedback on CommPortal

Subscribers and Business Group Administrators can use a **Send Feedback** link on the UI to send information to their Service Provider if they encounter an issue when using the CommPortal UIs.

When the subscriber or BG Admin clicks on the **Send Feedback** link, they will see the **Feedback** pop-up.
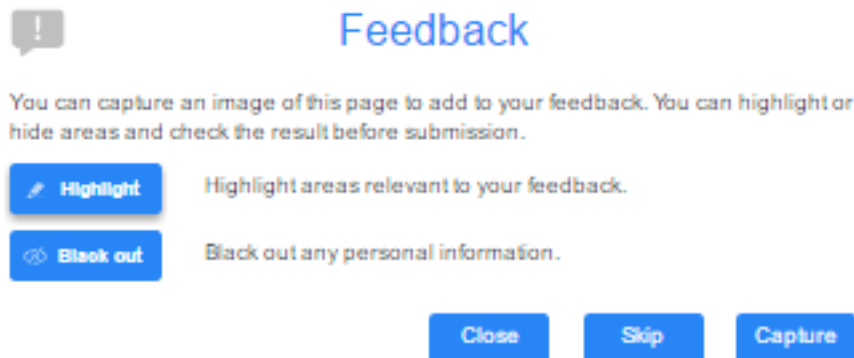


**Figure 4: Send Feedback - first screen**

On the first screen of this pop-up, a subscriber or BG Admin can optionally highlight a particular area of their screen and choose to hide any personal data. To include this screenshot in the feedback report, they then select **Capture**. If the subscriber or administrator simply wants to write a description of their issue or suggestion, they select **Skip**. Both options launch the second screen.
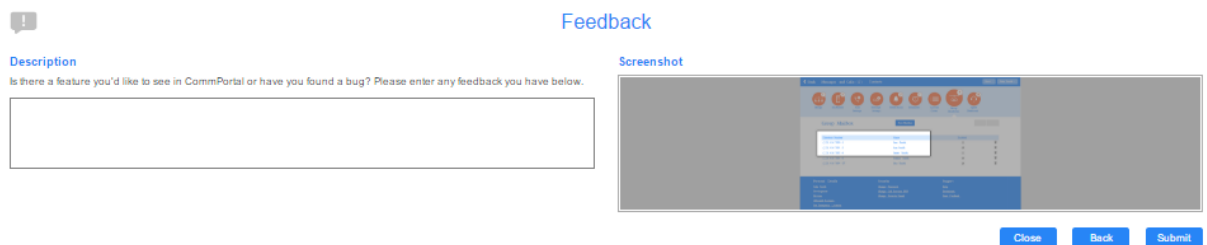


**Figure 5: Send Feedback - second screen**

On the second screen, the subscriber or administrator can write a short description of their issue or suggestion. They will also see the image if they captured one in the previous step. They then press **Submit** to send the report to their Service Provider.

This feature is only visible if you have enabled it in the CommPortal customization, as described in *Enabling the CommPortal Send Feedback option* in the *MetaSphere EAS & CommPortal Customization and Branding Guide*.

These error logs must then be collected by the Service Provider or their support representative so that the issues raised can be addressed, as described in *Monitoring CommPortal Error Reports* in the *MetaSphere EAS & CommPortal Operational Procedures Guide*.

# 3 Features for Subscribers

The default CommPortal UI, available in US English, enables subscribers to view and manage the different features of their telephone service using their CommPortal account.

The following documents provide an overview of the features available to subscribers on the default CommPortal UI. Your subscribers may not have access to all these features, depending on which services you are offering.

The screen shots in these sections use the CommPortal default UI without any branding. As described in the *MetaSphere EAS Customization and Branding Guide*, you can brand the default UI to use your colors and company branding.

## 3.1 CommPortal Subscriber Home Page

The CommPortal Subscriber Home page displays the most important aspects of a subscriber's CommPortal account, including their phone status (if they use a Call Manager service), and provides easy navigation to the other CommPortal screens where they can access their messages, view their contacts and configure notifications.

Subscribers will see a screen similar to the following when they first log on to their CommPortal account.
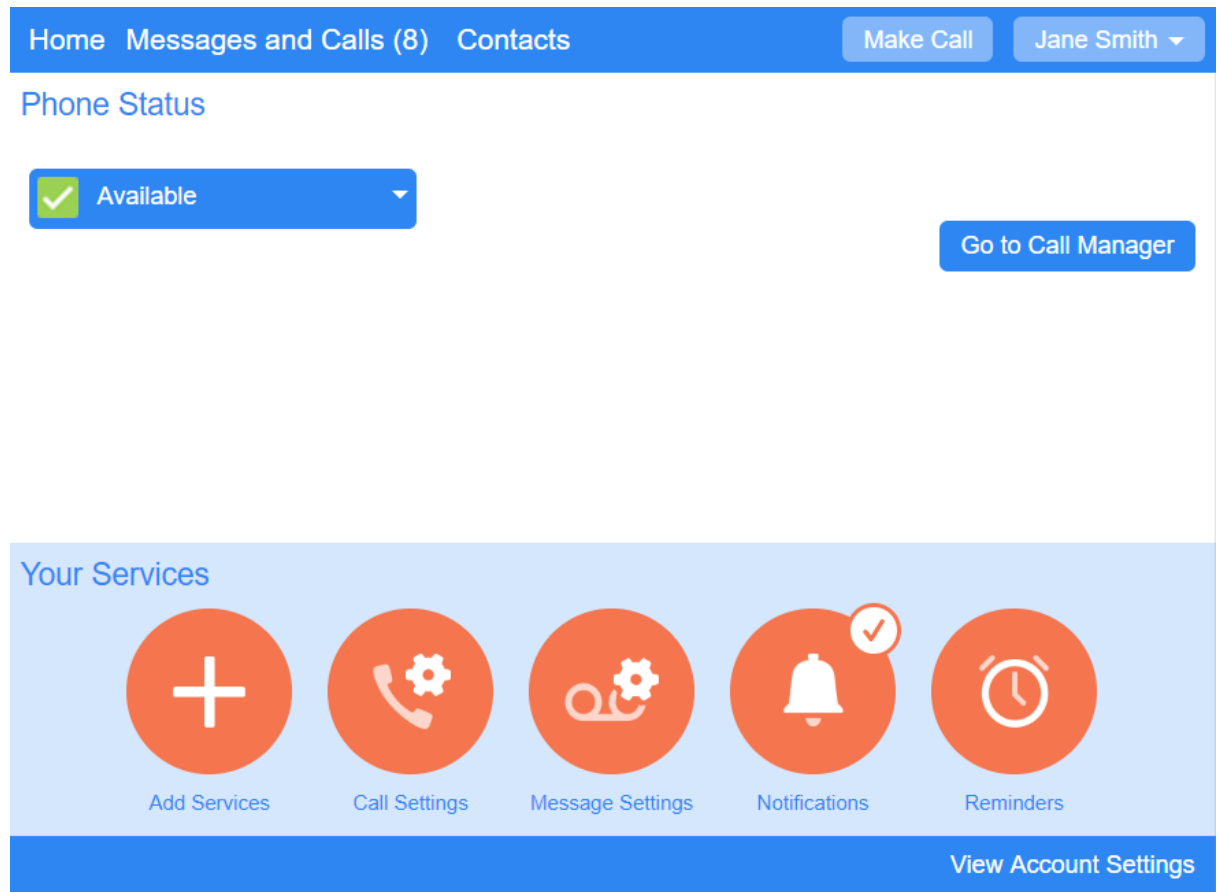
**Figure 6: CommPortal UI Home Page**

The screenshot shows a subscriber who has the Easy Call Manager service.

- If the subscriber uses either Business Call Manager (BCM), Incoming Call Manager (ICM) or MetaSphere CFS Call Manager, they will see the appropriate service on the home page.
- If the subscriber is an Easy Attendant or Premium Attendant, the Home page will display the Line Status.
- The subscriber will only see the services that are made available to them on the Your Services panel, for example through Class of Service Settings.

The screen is divided into several panels.

- The top ribbon provides

  - a count of the unread messages and faxes in the subscriber's mailbox and a link to the Messages and Calls page described in CommPortal Message and Calls page on page 30

  - a link to the subscriber's Contacts page, described in CommPortal Contacts page on page 31

  - a warning icon if the subscriber's mailbox is full or approaching capacity

  - a **Make Call** button that launches the Dialer (described in Click to Dial on page 21)

    - If the subscriber has MaX Meeting, the **Make Call** button is replaced by a **Start** box with a drop-down menu that includes the **Make Call** option as well as links to start a Meeting and/or manage a Webinar.

- a drop-down that enables a subscriber with multiple phone numbers associated with their account to select one of these alternative numbers and view their CommPortal account for that number.

    This drop-down also includes the **Logout** link that enables a subscriber to log out of CommPortal, for example if they are viewing their account on a public computer.

- The **Phone Status** panel displays the subscriber's current status and provides a link to the Call Manager service.

    - This subscriber uses Easy Call Manager. See CommPortal Call Manager on page 23 for details of the different Call Manager services available.

- The **Your Services** panel displays icons for the different services available to this subscriber that provide links to new screens where the service can be configured or managed. Some of these icons display information about that service at the top right of the icon:

    - a tick indicates if a service has been enabled

    - a number is a count of the particular item, for example how many Groups a subscriber currently belongs to

    - indicates that the subscriber will leave the CommPortal UI when clicking this icon, for example to launch the Agent Dashboard if the subscriber is an Integrated ACD agent.

- These services may include the following, all of which are described in separate sections below:

    - CommPortal Groups Page on page 33
    - CommPortal My Mobile Page on page 34
    - CommPortal Call Settings Page on page 37
    - CommPortal Message Settings Page on page 39
    - CommPortal Notifications Page on page 41
    - CommPortal Reminders Page on page 42
    - CommPortal Account Codes Page on page 44
    - CommPortal Group Mailbox Page on page 44
    - CommPortal Agent Dashboard on page 45

- Clicking **View Account Settings** reveals the **Personal Details, Security and Support** panel.
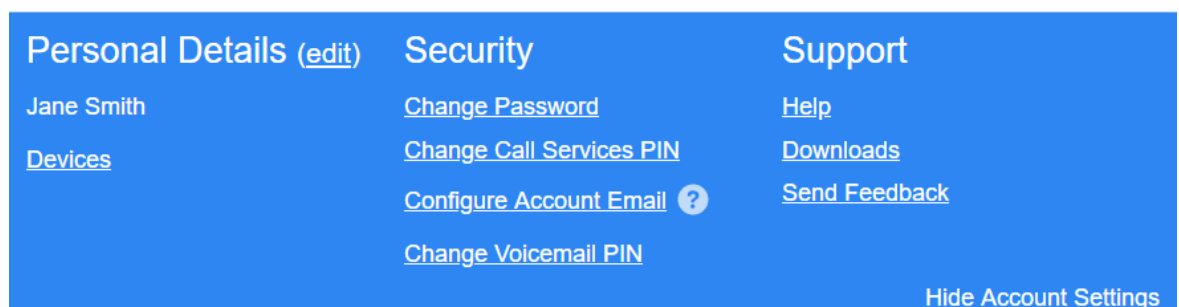


**Figure 7: Account Settings panel**

On this panel, the subscriber can

- configure any additional devices, for example their desk phone

- Clicking on this link launches a pop-up where the subscriber can see details of their current devices and, if they have a desk phone, use a **set keys** link to launch a further pop-up where they can configure the keys on the selected device.

- if they have Meeting, use the Allocated Licenses link to see any licenses that have been allocated to their line allowing them to host large Meetings or Meeting Webinars

- set their emergency location so that if they need to make a 911 call it can be routed to an emergency operator near the subscriber

- follow links to change their password, Call Services PIN, or email address

  - Up to V9.5.10, the email address link is **Change Security Email**. This email address is used to let subscribers know of any PIN or password changes and send password reset links.

  - From V9.5.20, the email address link is **Configure Account Email**. This email address can also be used for email-based login as well as for letting subscribers know of any PIN or password changes and sending password reset links.

- access CommPortal's Help pages

- launch the Downloads pop-up described in Downloads on page 22

- send feedback on any issues with the CommPortal UI, as described in Sending feedback on CommPortal on page 17.

## Click to Dial

> **Note:**
>
> The Click to Dial feature must be enabled in a subscriber's Class of Service.

Subscribers can make a Click to Dial call directly from CommPortal by clicking the **Make Call** button on the Home page. Subscribers with Meeting access this option by clicking the down arrow next to the **Start** button on the top ribbon and selecting **Make Call**.

Clicking the **Make Call** link launches the following pop-up.

## Dialer

**Make a call to:**

enter number to call ▼

**From:**
6 (534) 789 6543 Change

[Dial] [Close]

**Figure 8: Dialer pop-up**

The pop-up allows the dialer to

- select a contact or type a name or number in the input box - CommPortal will show any matches with the subscriber's contacts as they type

- make the call using the phone number that is displayed, or click **Change** to select one of their other configured numbers or type in a new number.

  When the subscriber clicks **Dial**, the phone they have chosen for making the call will ring. The subscriber answers that phone and the call is then made. The pop-up disappears 15 seconds after the call is established.

## Downloads

The **Downloads** link on the bottom panel of the CommPortal Home page launches a pop-up where subscribers can download apps including the MaX UC Desktop and MaX UC Mobile clients onto their desktop or mobile devices.
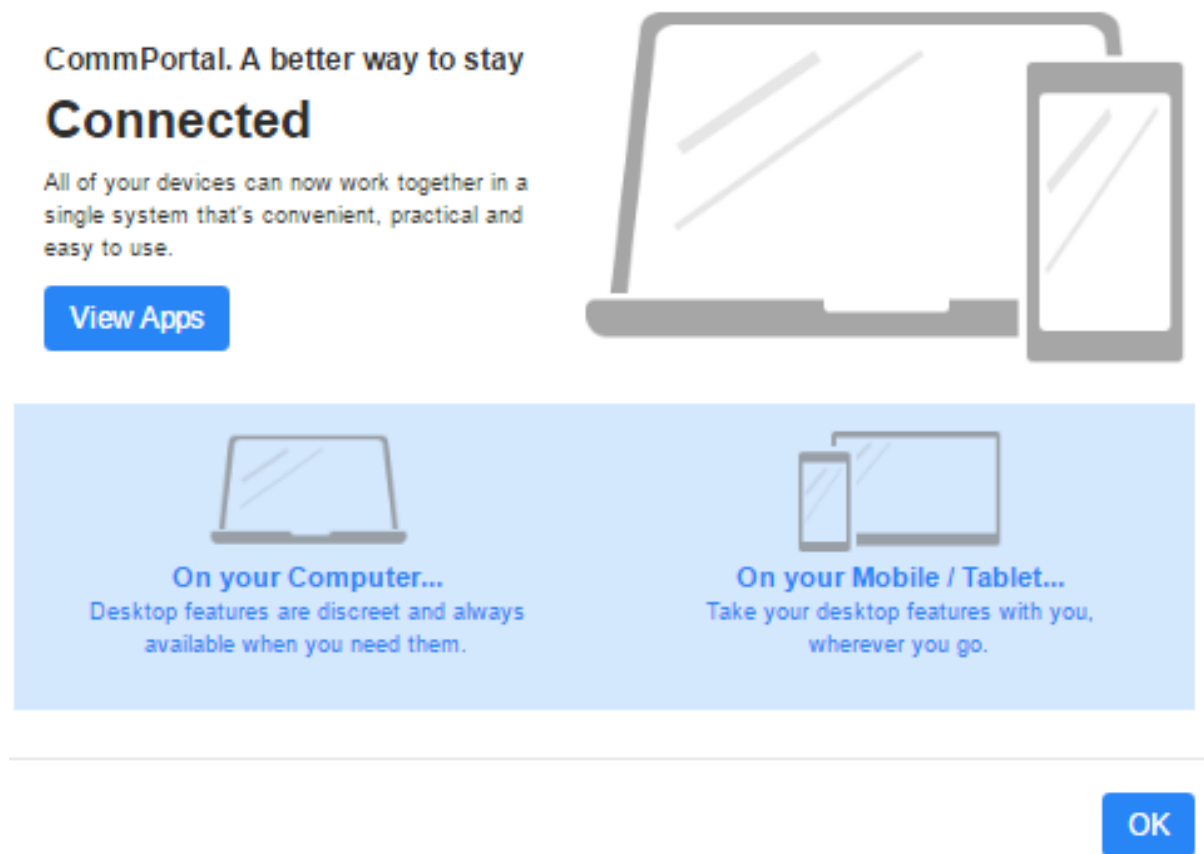
**Figure 9: CommPortal Downloads pop-up**

## 3.2 CommPortal Call Manager

Subscribers who have either Business Call Manager, Easy Call Manager, Incoming Call Manager, or MetaSphere CFS Call Manager can view and configure their call manager service using CommPortal.

A Call Manager service allows subscribers to manage how incoming calls are handled. CommPortal provides a single management interface for all the services affecting incoming calls that a subscriber is subscribed to, so that they can see which services are active and how they interact.

You can configure your subscribers to use one of the following Call Manager services.

- Business Call Manager (BCM) on page 23
- Easy Call Manager on page 26
- Incoming Call Manager on page 28
- MetaSphere CFS Call Manager on page 29

### Business Call Manager (BCM)

**Note:**
You must have a MetaSphere CFS in your deployment and have carried out the necessary

configuration to enable Business Call Manager on your CFS before your subscribers can use this feature.

Business Call Manager enables subscribers to configure and make changes to how their incoming calls should be handled depending on whether or not they are available for calls.



**Figure 10: Business Call Manager**

On this screen, subscribers can

- set their phone status, as described in Phone Status on page 24
- configure how incoming calls are handled, as described in Incoming Call Settings on page 24
- configure more advanced call services, as described in Advanced Settings on page 25.

**Phone Status**

Subscribers use a simple drop-down to set their phone status to **Available for Calls** or to **Do Not Disturb**.

- When the drop-down is set to **Do Not Disturb**,calls will be forwarded to voicemail, although the subscriber can use the link to configure a list of priority callers who can still ring their phone.



**Figure 11: Business Call Manager Do Not Disturb**

**Incoming Call Settings**

Subscribers can use drop-down and input fields to configure how their incoming calls are handled.

This includes

- configuring which phone(s) will ring, setting the order in which these phones will be tried and how long each phone will be allowed to ring
- forwarding calls to another number
- setting the behavior if the subscriber either does not answer the call within a specified time period, or all their configured phones are busy
- from V9.5.40, for subscribers whose line is assigned to a Call Service Group (CSG), choosing to restore call forwarding settings to the default settings for the CSG rather than those that might have previously been set by the subscriber.



**Figure 12: Business Call Manager Incoming Call settings**

## Advanced Settings

The Advanced Settings panel allows subscribers to configure and activate the following range of advanced call services. Subscribers will only see the call services that they are subscribed to.

- **Forward Selected** - calls from numbers on a forwarding list created by the subscriber will be forwarded to another telephone number configured by the subscriber.
- **Reject Selected** - calls from numbers on a rejection list created by the subscriber will be rejected.
- **Distinctive Ringtone** - calls from numbers on a list created by the subscriber will use a different ringtone.
- **Forward If Unavailable** - the number that calls will be forwarded to if the subscriber's phone is unavailable, for example because it has been disconnected or there is a fault on the line.
  - from V9.5.40, subscribers whose line is assigned to a Call Service Group (CSG) will see an option to restore call forwarding settings to the default settings for the CSG rather than those that might have previously been set by the subscriber.
- **Anonymous Callers** - calls from anonymous callers will be rejected without going to voicemail.

Subscribers can click on the name of each call service to enable or disable it. When a service is disabled, the icon on the left has a strike through symbol superimposed. The Advanced Settings panel also shows a warning icon if a call service has been made inactive by another setting. For example, on the following screen shot the **Distinctive Ringtone** and **Forward If Unavailable** services are not active because calls are being forwarded.
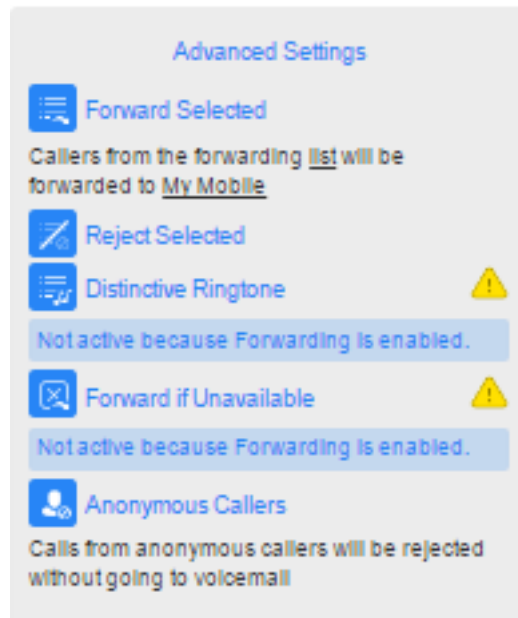


**Figure 13: Business Call Manager Advanced Settings**

## Easy Call Manager

MetaSphere EAS's **Easy Call Manager** (ECM) is an easy-to-use call handling service, with a simple set of configurable profiles, that you can offer to subscribers if you do not have MetaSphere CFS. It is enabled by a Class of Service setting.

## Phone Status

Choose how calls to (501) 203 0006 will be directed.                     Apply   Cancel

☑ Available

➖ Do Not Disturb

🖼 Forward All Calls

▼ **Normal callers**
- ◉ Ring my phones at the same time:
  - ☑ My Phone  (501) 203 0006
  - ☐ My Mobile  (123) 456 7890
    - change my phones
- ○ Forward to another phone
- ○ Send to voicemail

▼ **Anonymous**
- ◉ Handle like Normal callers
  - ☐ Ask caller to say their name before I accept the call ❓
- ○ Send to voicemail

▼ **VIP - Active**
- ◉ Ring my phones at the same time:
  - ☑ My Phone  (501) 203 0006
  - ☐ My Mobile  (123) 456 7890
    - change my phones
- ○ Forward to another phone

**Manage VIP callers**

▼ **Unwanted**
- ◉ Reject
- ○ Send to voicemail
  - ℹ You have no Unwanted callers

**Manage Unwanted callers**

▼ **Additional options**

*These options apply where you've chosen to ring My Phones.*

If I don't answer:
- ○ Forward to another phone
- ◉ Send to voicemail

If I'm in a call: ❓
- ○ Forward to another phone
- ◉ Send to voicemail

**Figure 14: Easy Call Manager**

Subscribers can choose their active call handling profile from the three profiles available.

- The **Available** profile allows subscribers to accept incoming calls and to configure their call handling options. For example, a subscriber may wish their phone to ring as normal, or receive calls simultaneously on their choice of phones to avoid missing a call. Additionally, a subscriber may wish to apply special call handling rules for calls from specific numbers, for example, to screen calls from anonymous numbers, or to give priority to calls from VIP numbers and reject calls from unwanted numbers (which the subscriber can configure).

  Subscribers also have the option to automatically forward calls to a different number or send calls to voicemail when their line is busy or when they don't answer their phone.

- The **Do Not Disturb** profile allows subscribers to send all incoming calls to voicemail. For example, a subscriber may wish to activate this profile if they are in an important meeting.
- The **Forward All Calls** profile allows subscribers to forward all incoming calls to their choice of phone. For example, a subscriber may wish to activate this profile if they are out of the office and want to forward all calls to their hotel room or to a colleague.

## Incoming Call Manager

MetaSphere EAS's **Incoming Call Manager** (ICM) offers an integrated call handling service, with a powerful set of configurable rules. For subscribers who want a highly customizable call handling service, Incoming Call Manager provides more flexible and detailed configuration options than Easy Call Manager.



**Figure 15: Incoming Call Manager**

Subscribers can use the Incoming Call Manager screens in CommPortal to configure sets of rules, and set schedules for when specific rules should apply to incoming calls.

- On the **Summary** screen, the subscriber can

    - view and configure their call-handling options, for example, a subscriber may wish their phone to ring as normal, or divert all calls directly to voicemail, or apply some of their call handling rules depending on the time of day

    - automatically forward calls to a different number or send calls to voicemail when their line is busy or when they don't answer their phone

    - choose whether to use the default or record/upload custom ringback audio.

        This ringback audio is played to the caller while they are waiting for their call to be answered. When the subscriber chooses to use custom ringback, they will see a recording pop-up where

they can either record or play the ringback as an audio stream, or upload or download the audio as a file.

- On the **Rules** screen, the subscriber can configure more advanced Sets of Rules for their incoming calls. For example, a subscriber might want to forward calls from family and friends to a home phone, while forwarding calls from the office directly to voicemail, or to screen calls from a particular number. Up to 20 Sets of Rules may be configured.

- On the **Weekly Schedule** screen, the subscriber can split their week into defined periods, during which they wish their different call processing rules to be applied.

- On the **Special Days** screen, the subscriber can set dates that are exceptions to their normal weekly schedule, for example vacations or business trips. This screen includes the option to add the public holidays for their region automatically at the click of a button.

## MetaSphere CFS Call Manager

The MetaSphere CFS Call Manager page provides a summary of how the subscriber's incoming calls will be handled, according to the MetaSphere CFS services that are currently enabled. This allows the subscriber to see at a glance how the services combine and interact, and to verify that the settings are correct.
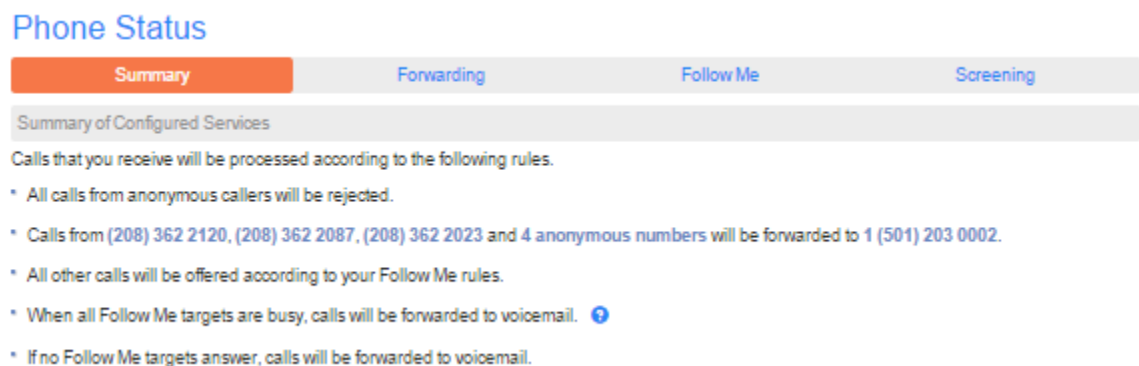


**Figure 16: CFS Call Manager Page**

Subscribers can use the other links on this page to configure and manage their call handling settings.

- On the **Forwarding** screen, the subscriber can configure the behavior for their call forwarding call services and manage the telephone numbers used as forwarding destinations.

  - From V9.5.40, subscribers whose line is assigned to a Call Service Group (CSG) can choose to restore immediate and unavailable call forwarding settings to the default settings for the CSG rather than those that might have previously been set by the subscriber.

- On the **Follow Me** screen, the subscriber can set up rules to ring a defined sequence of additional phone numbers when a subscriber does not answer an incoming call on their primary line.

- On the **Screening** screen, the subscriber can choose to accept or reject calls from a configured list of phone numbers, reject all calls from anonymous callers, and set a distinctive ringtone for calls from selected callers.

# 3.3 CommPortal Message and Calls Page

Subscribers can view and manage their calls and messages using CommPortal.

Subscribers can follow the **Messages and Calls** link to launch a new screen where they can view lists of calls made, received or missed and, if they have the MetaSphere EAS voicemail service, manage their messages. If you provide a fax service, subscribers will also see details of any faxes sent or received.



**Figure 17: Messages & Calls screen**

The **Messages** screen displays a subscriber's most recent messages, including the time at which the message was received. Messages in bold have yet to be heard.

Using this screen, the subscriber can

- press the play icon to listen to a message
- click on the caller's name or number to launch a pop-up where they can call back, add the caller to their Contacts or edit existing contact details for this caller

- see transcriptions of these messages or, if transcription was not possible, the reason why (if you offer a Speech to Text service)

- see whether a message was marked as urgent ▮ or private 🔒.

- see icons indicating the type of device the message was received on, for example ▥ indicates a desk phone, and mouse over the icon to see the phone number of the device that was called

- use the **Action** drop-down to reply to the message, mark it as heard, or forward the message either as an email or a voicemail.

- click the trash icon to delete an individual message or click **Delete All** at the top of the screen to delete all their messages

- click the **New Voicemail** button at the top of the screen to launch a pop-up where they can record a new message, select the phone number and, if necessary, mark the message as urgent and/or private.

The following screens are accessed by clicking on the option on the gray ribbon at the top of the page.

- The **Faxes** screen is very similar to the **Messages** screen and displays details of any faxes received by the subscriber.

- The **Missed**, **Dialed**, **Received**, and **Rejected** screens each show lists of calls in that category.

  - As on the **Messages** screen, icons indicate the type of device used for the call and mousing over the icon reveals the phone number of the device.

  - Each screen has an **Export** button that launches a pop-up where subscribers can choose to export call lists of their received, missed, and/or dialed calls in csv format.

  - Subscribers with a Call Manager service can mouse over a **Show Rule** link to see which rule caused a call to be rejected and follow the link to go to their Call Manager page.

- The **Deleted** screen displays a list of deleted messages. This only appears if the subscriber has an account with a Class of Service that stores deleted messages in a trash folder. The subscriber can use options on this screen to listen to a deleted message, restore or permanently delete individual messages, and permanently delete all messages.

- The ⚙ icon provides a handy link to the **Message Settings** page described in CommPortal Message Settings Page on page 39.

## 3.4 CommPortal Contacts Page

Subscribers can use the CommPortal Contacts page to view and manage their contacts.

Subscribers can click on the **Contacts** link on the top ribbon of the CommPortal **Home** page to view and manage their contacts and, if they have configured them, any contact groups.

The Contacts page displays lists of all the subscriber's contact groups (identified by a group icon) followed by their contacts, in alphabetical order. The interface includes a powerful search facility, allowing the subscriber to look up a contact by name, organization name, telephone number or address, rather than having to scroll through a long list.

A subscriber can have up to 1,000 contacts.

When the check box alongside a contact is ticked, the existing details for this contact are displayed.
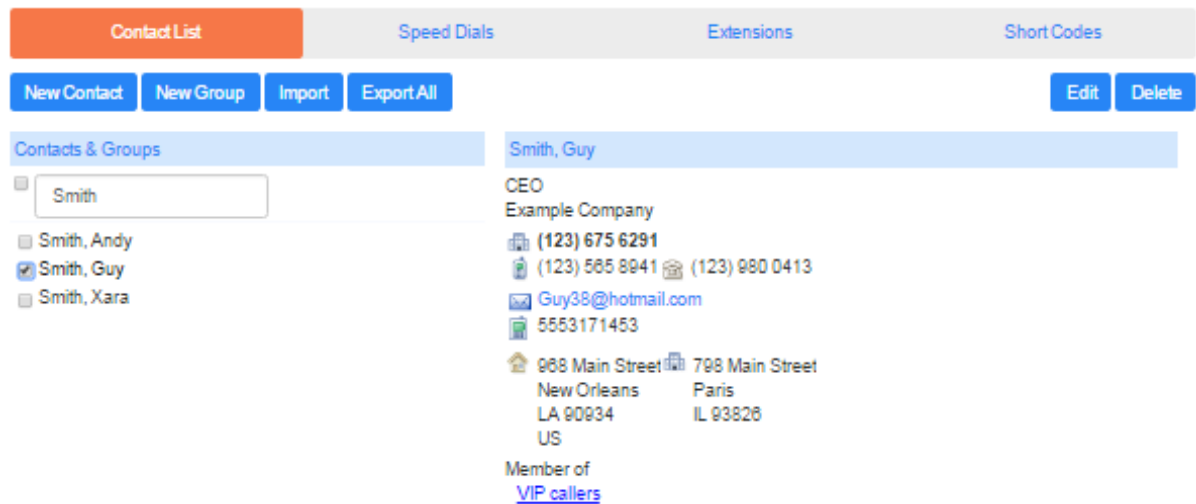


**Figure 18: CommPortal Contacts page**

The subscriber can use the **Edit** button to make changes to a contact's details, or press **Delete** to remove the contact.

As well as being a useful way of storing and retrieving contact details, this Contact List is used in other ways.

- The **Messages and Calls** page displays the names of any callers who appear in a subscriber's contact list.
- Call Manager and other services allow subscribers to specify callers by selecting them from the contact list, without having to type in their numbers.
- Contact lists can be integrated with a subscriber's Outlook contacts. If a subscriber has downloaded CommPortal Assistant (CPA) and has an Outlook profile, the subscriber can configure CPA to automatically synchronize any changes made to a contact in CommPortal with the corresponding entry in Outlook, and vice versa. CommPortal Assistant will perform a contact sync every hour. Outlook does not need to be open on the subscriber's computer when this happens.
- Subscribers can use the **Export All** button to download their contacts in csv format for use outside of CommPortal. Clicking this button launches a pop-up where the subscriber can select **Outlook/ Outlook Express compatible**, **Windows Contact on Vista** or **Native Format** as the export mode.
- Subscribers can use the **Import** button to upload a csv file containing contact details for use in CommPortal. This launches a pop-up where the subscriber can

  - select the csv file to import
  - choose what happens if a contact in the file already exists in CommPortal, for example to overwrite the contact or ignore the imported entry
  - view the progress of the import. CommPortal will display error messages, for example if the import file is not in the correct format, or contains badly formatted entries.

## Speed dials

Speed dials are one or two-digit codes that can be mapped to particular telephone numbers for faster dialing. These codes are then used instead of the telephone number.

If you offer this call service, the subscriber will see a **Speed Dials** link at the top of the Contacts page. This launches a screen where the subscriber can configure and manage their speed dials.

## Extensions

If your subscribers are members of a Business Group, they can use extensions to dial other numbers in the Business Group.

The **Extensions** screen displays the extensions that are currently in operation for lines in the Business Group.

## Short codes

Business Group subscribers can also use short codes to dial common numbers.

The **Short Codes** screen shows the short codes that are currently in operation.

# 3.5 CommPortal Groups Page

Subscribers who are members of a MetaSphere CFS Business Group can use the CommPortal Groups page to view the details of any Multiple Access Directory Numbers (MADNs), Multi Line Hunt Groups (MLHGs) and Call Pickup Groups of which they are members.

**Note:**

Subscribers will only see the **Groups** button if they are a member of at least one MADN, MLHG, or Call Pickup Group.

The **Groups** button on the CommPortal Home page displays the number of groups that the subscriber belongs to. Clicking on this button launches the **Groups** page.

## Groups

Multiple Appearance Directory Numbers, Multi Line Hunt Groups and Call Pickup Groups you are a member of. For Multi Line Hunt Groups, ⤵ indicates logged-in, and ⤴ logged-out.

| Group Membership | | Call Pickup Group: Jeff's | | |
|---|---|---|---|---|
| Call Pickup Group: Jeff's | | Department: | MetaSwitch | |
| Call Pickup Group: Toms | | Number of Lines: | 4 | |
| Sim-Ring Group: 2555454 | | **Number** | **Extension** | **Name** |
| ⤵ Hunt Group: Accounts | | (501) 203 0006 | 454 | John Smith |
| ⤴ Hunt Group: Sales | | (501) 901 1201 | 455 | Alice |
| | | (501) 901 1202 | 456 | Jack |
| | | (501) 901 1229 | 927 | Ann |

**Figure 19: CommPortal Groups Page**

On the left of this page, the subscriber can see a list of any Multiple Access Directory Numbers (MADNs), Multi Line Hunt Groups (MLHGs) and Call Pickup Groups that they belong to. If the subscriber is a member of an MLHG, they will see an icon alongside each MLHG to indicate whether they are currently logged in or out of that group.

Selecting a group displays full details of the group on the right of the screen. If a subscriber selects an MLHG, they can see which members are currently logged in or out and, if they are able to, can use a link on this screen to log themselves out of the MLHG.

## 3.6 CommPortal My Mobile Page

Subscribers can use the My Mobile page to associate a mobile phone number with their CommPortal account, enabling them to receive text notifications on their mobile when they have a new message in their CommPortal mailbox and optionally use their ComnmPortal mailbox as their mobile phone's voicemail service.

Clicking on the **My Mobile** button launches the **My Mobile** page where a subscriber can enter the details of their mobile phone so that they can use this phone with their CommPortal account and

* automatically recognize their mobile number when retrieving messages
* receive a text notification when a new message is left in their CommPortal mailbox
* optionally use their CommPortal mailbox as their mobile phone's voicemail service.

Once a subscriber has entered their mobile number, they will see a screen where they can set up and manage various settings for this service.

## My Mobile

**My Mobile Number**

(123) 456 7890                        Remove

*Hint: You can retrieve messages and access mailbox settings by calling (987) 654 3210 from your mobile.*

*Add it as a speed dial or contact on your mobile to save you having to remember it.*

**Fuse My Mailbox**

To use your mailbox on (501) 203 0006 to take messages from callers to your mobile, you will need to set up call forwarding on your mobile. For instructions on how to do this, please select your mobile provider from the list below.

[                              ▼]   View

**Mobile Settings**

☑ Send me a text notification when I receive a new message.
☑ Skip PIN  ❓
☐ Auto-Play Voicemail  ❓
☑ Auto-Play Fax  ❓

Voicemail Playback:   [Message only      ▼]

Save Settings

**Figure 20: CommPortal My Mobile Page**

On this screen, the subscriber can

- remove their mobile number, either because they no longer want to use the service or need to enter a different mobile number

- use the Fuse My Mailbox panel to select their mobile provider and use the instructions that apear to configure their mobile phone to activate or deactivate call forwarding from their mobile to their CommPortal mailbox

- configure or modify the configuration of how they receive notifications of new messages and how they access the messages in their CommPortal mailbox using their mobile phone.

# 3.7 CommPortal Add Services Page

Subscribers hosted on MetaSphere CFS can use the Add Services page to sign up to call services simply by clicking on the appropriate option.

Clicking on the **Add Services** button launches the **Add Services** page where a subscriber can see a list of all the CFS call services you offer to which they are not currently subscribed. They can then sign up to a new call service simply by clicking on the appropriate option - without time-consuming calls to your helpdesk.

**Figure 21: CommPortal Add Services Page**

If you would prefer not to allow this feature, or to restrict which services the subscriber can sign up to in this way, you can easily disable or restrict it as part of the branding process for the CommPortal UI. This process is described in the *MetaSphere EAS Customization and Branding Guide*.

> **Note:**
>
> When a subscriber signs up to a new service, MetaSphere creates a Self-Subscription Log File. You should ensure that your operational staff monitor this log to ensure that your subscribers are correctly billed for the services to which they have subscribed. For more details about the content and format of this log, see the *Appendix: Self-Subscription Log Files for CommPortal* section of the *MetaSphere EAS and CommPortal Operational Procedures Guide*.

Note the following restrictions to self-subscription.

- Business Group Line Users and subscribers either hosted on legacy switches or who have a Direct Inward Dial (DID) line on a PBX cannot self-subscribe to new services. The **Add Services** tab is not available for these users.

  - Business Group Administrators will use the **Add Services** tab to subscribe a Business Group line to a call service when modifying Business Group lines, as described in Business Group and Department Lines on page 57. You should refer to the *Call Services Manual* which accompanies your MetaSphere CFS for more information on the call services available to Business Group lines on MetaSphere CFS and how to configure them.

- Access to MetaSphere EAS Call Services is controlled through the subscriber's Class of Service, and cannot be done on a self-subscription basis. Refer to the *MetaSphere EAS Subscriber Administration Guide* for more information on using Classes of Service when provisioning subscribers.

## 3.8 CommPortal Call Settings Page

Subscribers can use the CommPortal Call Settings page to configure call settings including caller ID, call forwarding, call blocking and call jump.

Clicking on the **Call Settings** button launches the **Call Settings** page where a subscriber can configure their call service options.



**Figure 22: CommPortal Call Settings Page**

The subscriber uses the check boxes and input fields to specify how their calls should be handled. Subscribers will only see the features they are able to use.

- The **General** panel allows the subscriber to configure some basic call handling rules, including setting various caller ID options. Individual subscribers can also set their own call transfer number.

  From V9.5.40, Business Group Administrators can allow Business Group subscribers to enter their own call transfer number that will override the default operator number set for the Business Group or Department. This number will then be used when a caller who is listening to the voicemail menu on a subscriber's mailbox chooses the option to be transferred to an operator rather than leaving a message. For example, a subscriber may want to divert these calls to a mobile device rather than the office receptionist.

- The **General** panel may also include an option to disable Call Recording. See Call recording on page 39 for more information on this option.

- The **Call Forwarding** panel allows the subscriber to configure whether they need to enter a phone number each time they turn on the Immediate Forwarding, Busy Forwarding or No Answer Forwarding options.

- The **Call Blocking** panel allows a subscriber to bar calls of a particular type, for example they wish to prevent Premium Rate calls being made from their telephone line.

  - From V9.5.40, subscribers whose line is assigned to a Call Service Group (CSG) can choose to restore call blocking settings to the default settings for the CSG rather than those that might have previously been set by the subscriber.

- The **Call Jump** panel allows a subscriber to enter an alternate number (usually a different landline number) and/or a wireless number that can be used to transfer an established call made or received using their primary phone number. These numbers need not be associated with the subscriber's CommPortal account. The subscriber can then enter a short code to make the transfer to one of these numbers.

  This option is only visible if the subscriber has MetaSphere EAS Call Jump and DTMF Control enabled in their Class of Service. Subscribers who use MetaSphere CFS 3-way calling services cannot invoke MetaSphere EAS Call Jump on a multi-party call that they have created. In this scenario, the Call Jump attempt has no effect and the call remains on the subscriber's original device. However, the other parties in the 3-way call can use Call Jump to transfer the call to another device.

- The **Call Me Buttons** panel allow subscribers to enable or disable their Call Me service and to cancel their existing buttons. For more information on how your subscribers can use this service, see Appendix: Using Call Me on page 125.

> **Note:**
>
> If you want to stop the Call Me service across your whole deployment, you can use the craft interface to revoke all Call Me buttons used by your subscribers by following the instructions in the *MetaSphere EAS Operational Procedures Guide.* However, if you do this and subsequently want to reactivate the Call Me service, your subscribers must recreate and redistribute their Call Me buttons.

## Call Recording

**Note:**

Many jurisdictions have laws, including wiretapping laws, which regulate the privacy of calls. These laws and regulations may restrict or prohibit the use of the Call Recording feature. For example, in some jurisdictions a call participant must provide notice to all other call participants before recording the call. You are responsible for ensuring that any use of this feature complies with all applicable laws and regulations.

The Call Recording option is only visible to Business Group Administrators who click through to this page from the CommPortal BG Admin interface to configure a Business Group line, and will only be present if this Business Group line is hosted on MetaSphere CFS and is subscribed to the call recording service.

The Business Group line subscriber will never see this option.

When a Business Group's Persistent Profile enables the Call Recording service, a Business Group Administrator can use the **Enable call recording** checkbox to enable or disable Call Recording for this Business Group line.

**Note:**

If intra-Business Group Call Recording is enabled for the Business Group, calls made between two subscribers within the same Business Group (using an intercom code) are recorded. If Call Recording warning tones are enabled for the Business Group, a warning tone is played at the start of, and during, all recorded calls.

The BG Admin can also click on the **Call Recording Server** link to access the default third-party Call Recording Server's web UI where they can configure the Call Recording service. In most cases, this link will be the same as the link which appears in the menu bar in the CommPortal BG Admin interface, described in Business Group Call Recording on page 77. You will configure the appropriate URLs for the Call Recording Server in MetaView Explorer, as described in the documentation that accompanies your MetaSphere CFS.

## 3.9 CommPortal Message Settings Page

Subscribers can use the CommPortal Message Settings page to configure message settings, including message and mailbox access options and controlling voicemail greetings.

Clicking on the **Message Settings** button launches the **Message Settings** page where a subscriber can configure how their messages are handled, how they access their mailbox and what greeting will be played to callers reaching their mailbox.

## Message Settings

Apply　Cancel

### General

Incoming calls are forwarded to voicemail after [36] seconds

☑ Transcribe voicemails in your inbox
☑ Enable live screening ❓
☑ Enable video messaging ❓
☑ Forward messages and faxes as emails

Forward to:　　　　　　　　　　　　　　　　Voicemails　Faxes
　andy.randall@domain.com edit | remove　　☐　　☑
　mike.birmingham@domain.com edit | remove　☑　　☑
　add an email address
☑ Leave original in Inbox
☑ Include action links in emails

### Mailbox Access

☑ Skip PIN
☑ Fast Login
☑ Auto-play voicemail
☑ Auto-play Fax
☐ Use short prompts
☑ Play greeting warning
Voicemail playback [Message only ▾]
Message playback order [Oldest first ▾]

### Voicemail Greeting

Use the greeting: [Extended Absence " (video) ▾]　edit

▸ more options

　☑ Use a temporary greeting [Personal Greeting 4 " ▾]　edit
　　Use this greeting until: [17 ▾] [13 ▾] on [12/28/2014]　▦
　　On expiry: [Send a notification ▾]

**Figure 23: CommPortal Message Settings Page**

The subscriber uses the check boxes and input fields to specify how their messages should be handled. Subscribers will only see the features they are able to use.

- The **General** panel allows the subscriber to

  - enable or disable voicemail transcription, live message screening, and video messaging
  - configure and manage autoforwarding of voicemails and faxes
  - choosing whether to include action links in the outgoing message that allow the subscriber to log in to their account, mark messages as read, or even delete them without needing to access CommPortal or the MetaSphere TUI.

- The **Mailbox Access** panel allows the subscriber to configure their mailbox settings by enabling or disabling fast login and skip PIN options and setting message playback options.

- The **Voicemail Greeting** panel enables the subscriber to

  - select their default greeting
  - use the **edit** button to launch the greetings recorder where they can record or upload a new greeting, or download an existing greeting.

- record greetings that will be played in particular circumstances, for example when the subscriber is in a call or outside business hours, or when the caller is in the same Business Group as the subscriber
- override their default greeting with a temporary greeting for a defined period of time

## 3.10 CommPortal Notifications Page

Subscribers who have the MetaSphere EAS voicemail or unified messaging services can use the CommPortal Notifications page to configure Message Waiting Indicators (MWI), email, pager, and outdial notifications that are triggered when they receive a new message in their mailbox.

Clicking on the **Notifications** button launches the **Notifications** page where the subscriber can expand the panels to enable and configure Message Waiting Indicators (MWI), email, pager, and outdial notifications and set up an override schedule for their outdial and pager notifications.

Notifications    Clear List   New Entry      Apply   Cancel

▼ Message Waiting Indicator

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

| Phone Number | All Faxes | Urgent Voicemail | All Voicemail | |
|---|---|---|---|---|
| (123) 456 7890 | ☑ | ☑ | ☐ | 🗑 |
| (987) 654 3210 | ☐ | ☐ | ☑ | 🗑 |
| (648) 952 1658 | ☐ | ☑ | ☐ | 🗑 |
| (357) 895 1236 | ☑ | ☐ | ☑ | 🗑 |
| (785) 412 3698 | ☐ | ☐ | ☐ | 🗑 |

▸ Email

▸ Pager

▸ Outdial

▸ Override

**Figure 24: CommPortal Notifications Page**

The subscriber can configure the following types of notification by expanding the relevant panel. However, the subscriber must first enable the notification type using the check box before they can make any changes to configuration.

- On the **Message Waiting Indicator** panel the subscriber can configure which of their phone numbers will be used to alert them to different types of new messages. This screen automatically includes their primary phone number but they can use the **New Entry** button to add any of their additional numbers.
- On the **Email** panel the subscriber can set up one or more email addresses where they will receive emails alerting them to new messages.
- On the **Pager** panel the subscriber can enter details of an outdial, numeric, or alphanumeric email pager, set the behavior for how pager notifications are sent and configure a schedule for when

incoming notifications are sent to the pager, for example during office hours only. The subscriber can only configure a single pager. If they need to change the pager, they must first use the trash icon to delete the current entry and then click **New Entry** to add the new one.

• On the **Outdial** panel the subscriber can enter a phone number that will be called to alert them to new messages and set up a schedule for when these outdials are made. They can also configure a time delay between receipt of a new message and the outdial, and set a retry limit and the delay between retry attempts until the message is marked as read.

• On the **Override** panel the subscriber can set a new schedule that overrides the schedules they have set for pager and outdial notifications for a defined period. This enables a subscriber to set up a different schedule, for example to cover their annual leave, without having to change their regular schedules for outdial and pager notifications. Once activated, only the override schedule applies and notifications are only delivered to the specified phone or pager until a configured expiry date or until it is manually disabled. Subscribers can only activate the override schedule if they have enabled the outdial or pager notifications service.

## Changes in notification behavior

There are a number of circumstances where the behavior of the notifications options will differ depending on the configuration of your deployment or the subscriber's account.

• Subscribers who have set up CommPortal to auto-forward their voicemails and faxes to an external email account and to delete these messages from their inbox will not receive any notifications when new messages arrive in their CommPortal account.

• If any of the telephone numbers used for email, outdial and pager notifications are affected by an area code split, the subscriber will have to change these manually once the area code split procedure has been completed, otherwise notifications will no longer be delivered. The MWI notification configuration is changed automatically during the area code split procedure.

• If your subscribers are using the Speech-to-Text transcription service, any email or SMS notifications on incoming messages will be suppressed until the transcription completes, which could take up to several minutes, even if the subscriber configures the **Delay for messages** as **Immediate**. MWI notifications are not postponed.

• If you are using the video messaging service, you should note that there is no distinction between voicemail and video messages when configuring notifications.

## 3.11 CommPortal Reminders Page

Subscribers can use the CommPortal Reminders page to set up and manage one-off and recurring reminder calls.

Clicking on the **Reminders** button launches the **Reminders** page where a subscriber can configure and manage one-off or recurring reminder calls. If you are hosting subscribers on a MetaSphere CFS, you can choose to enable either MetaSphere's EAS Reminders service or the on-switch Reminders service available on your MetaSphere CFS. Both options are described here, but you can only configure one of the service options for any individual subscriber.

## MetaSphere EAS Reminders

Subscribers using MetaSphere EAS Reminders will see the following screen when they access the Reminders page.

### Reminders

| Phone to ring | Description | Occurs | Time | |
|---|---|---|---|---|
| (123) 456 7890 | Dentist | Once on 8/15/2018 | 9:30 am | 🗑 |
| (654) 123 9870 | Lunch | Every weekday | 12:36 pm | 🗑 |
| (321) 789 6540 | Dinner | Every day | 6:37 pm | 🗑 |

☑ Enable reminder calls for this line.

Clear List   New Reminder   Apply   Cancel

**Figure 25: CommPortal MetaSphere EAS Reminders Page**

On this page, the subscriber can

- enable reminder calls for the line they are logged in on
- view existing reminders, and click on a reminder to edit it or use the trash icon to delete it
- click the **New Reminder** button to launch a pop-up where they can set up a new reminder, including selecting whether this is a one-off or a regular reminder that occurs every week or every day at the specified time, recording the message that will be played during the reminder call and, if they have multiple phone numbers associated with their account, choosing the phone number to which the reminder will be delivered
- click **Clear List** to delete all their currently configured reminders.

## MetaSphere CFS Reminders

Subscribers using MetaSphere CFS Reminders will see the following screen when they access the Reminders page.

### Reminders

Clear List   Apply   Cancel

| Occurs | Time | |
|---|---|---|
| Occurs once at next | 11:59 pm | 🗑 |
| Every Monday | 12:34 pm | 🗑 |
| Every Tuesday | 9:30 am | 🗑 |
| Every Friday | 6:00 pm | 🗑 |
| Every weekday | 9:21 am | 🗑 |

**New Reminder**

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

Occurs:   Every day ▼

Time:   9 : 30   am ▼

Add

**Figure 26: CommPortal MetaSphere CFS Reminders Page**

On this page, the subscriber can:

- view existing reminders, and click on a reminder to edit it or use the trash icon to delete it
- use the **New Reminder** panel to set up a new reminder, either to occur once in the next 24 hours or to repeat daily or weekly at the specified time
- click **Clear List** to delete all their currently configured reminders.

## 3.12 CommPortal Account Codes Page

Subscribers can use the CommPortal Account Codes page to view which types of phone numbers require a code before dialing.

The **Account Codes** page displays which types of outbound call require an account code to be entered before the telephone number. For example, a subscriber may only be able to make calls to premium numbers by entering an account code first.

If these settings are configured by the Business Group administrator rather than the subscriber, they are shown to the subscriber in read-only view.
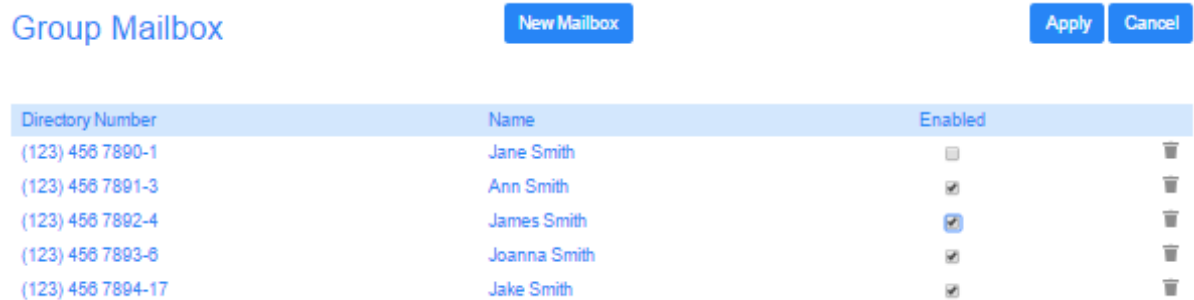


**Figure 27: Account Codes**

## 3.13 CommPortal Group Mailbox Page

Subscribers who are members of a group mailbox can use the CommPortal Group Mailbox page to view the details of the group mailboxes that they belong to and, if they are a primary subscriber, create a new secondary mailbox.

MetaSphere EAS subscribers can be provisioned either as individual or group subscribers. Group subscribers use a group mailbox. Each group mailbox has one primary and one or more secondary subscribers.

Clicking on the **Group Mailbox** button launches the **Group Mailbox** page.

All members of the group mailbox can view this page, but only the primary subscriber can make changes.

The primary subscriber can click on either the Directory Number or Name of a secondary subscriber to launch a pop-up where they can modify the following settings:

- first and last name

- PIN (and Password, if the PIN and password are allowed to be different)

- whether the secondary subscriber is enabled

- whether the secondary subscriber's messages affect the primary's MWI status (if the primary subscriber may use MWI notification and the secondary subscriber has messaging)

- whether information about the secondary subscriber's new messages are exposed to the primary subscriber via the TUI (if the primary and secondary subscribers both have messaging and their class of service allows message count aggregation).

If the group mailbox uses shared access numbers, the primary subscriber can also add or delete secondary subscribers.

## 3.14 CommPortal Agent Dashboard

If the CommPortal subscriber is acting as a Call Center Agent using Metaswitch's Integrated ACD solution, they can access their Agent Dashboard to see information on incoming calls and the activity of the Multi Line Hunt Group(s) that they belong to

If you have licensed CommPortal's Integrated ACD feature, a BG Line User who is a member of an MLHG will see an **Agent Dashboard** button. Clicking on this button launches the **Agent Status** page in a new browser window.
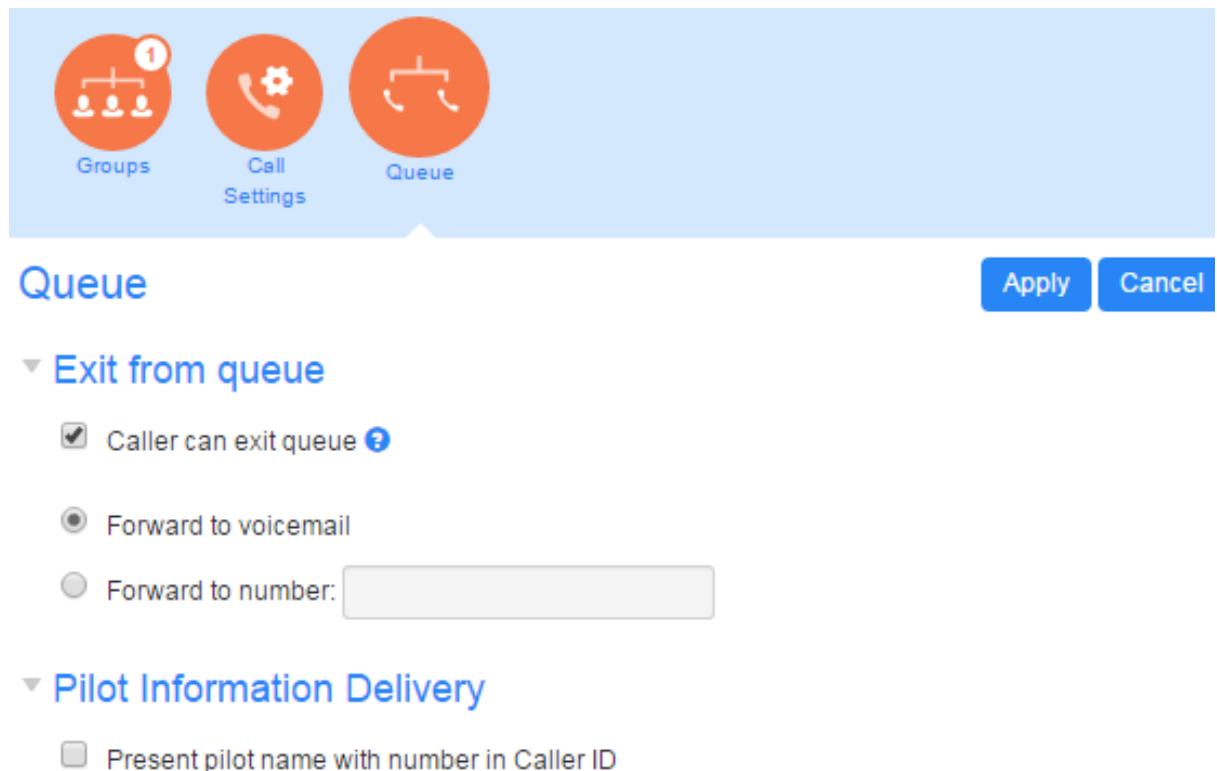
On this screen, the subscriber can

- see detailed information on the Queues (MLHGs) of which they are a member and log in or out of a Queue using a toggle button (where the Queue supports explicit login/logout).

- view statistics that show real-time information for each Queue, including the number of logged-in members, the number of calls waiting in a queue to be hunted to an agent and the average call waiting time before a call is answered.

- access a Current State drop down menu which will allow them to indicate their current availability for calls (if you are using the Premium ACD service level)

- see if there are currently any incoming calls for any of the Queues (only available if the MLHG member has Incoming Call Pop-up enabled in their Class of Service.)

## 3.15 CommPortal Queue Page

Subscribers who are logged in as an MLHG Pilot can configure queuing options for calls coming in to the Hunt Group (MLHG) Pilot Number.

The **Queue** button is only visible if the subscriber is logged in as an MLHG Pilot, and allows the subscriber to configure queuing options for an MLHG Pilot Directory Number.



**Figure 29: Queue screen**

The subscriber can

- select whether a caller can choose to exit a Queue by pressing zero and, if so, whether or not they are forwarded to voicemail or an alternative phone number

- choose whether the name of the pilot line is presented alongside the number in its Caller ID.

# 4 Features for BG Administrators

The CommPortal BG Admin UI enables Business Group Administrators to view and manage the different features of their telephone service using their CommPortal account.

The following sections provide an overview of the features available to Business Group Administrators on the default CommPortal BG Admin UI. Your Business Group Administrators may not have access to all these features, depending on which services you are offering and the administrative permissions you have granted to administrators.

- CommPortal BG Admin Home Page on page 48
- Working with Groups

  - Hunt Groups (MLHGs) on page 50
  - Sim-Ring Groups (MADNs) on page 51
  - Call Pickup Groups on page 52
  - Trunk Groups on page 53
  - Call Service Groups on page 55
  - Supervisor Dashboard on page 57
- Working with lines and phones

  - Business Group and Department Lines on page 57
  - Business Group Phones on page 62
- Working with Business Services

  - Business Group Departments on page 64
  - Trunk Routing Policies on page 65
  - Business Group Short Codes on page 67
  - Business Group Account Codes on page 69
  - Business Group Extensions on page 70
  - Business Group Call Reports on page 71
  - Business Group Call Recording on page 77
  - N-Series Music on Hold and Auto Attendant on page 77
  - MaX Meeting Licenses on page 77
  - Business Group Miscellaneous Settings on page 79

From v9.5.30, you can use branding options to hide services that you do not want to expose to your administrators.

The screenshots in these sections use the CommPortal BG Admin default UI without any branding. As described in the *MetaSphere EAS Customization and Branding Guide*, you can brand the default UI to use your colors and company branding.

The CommPortal BG Admin UI can either be provided at a fixed size or allowed to grow to fit the screen or surround, and is supported on touch screen and mobile devices. However, you should

note that using phones and tablets to administer Business Groups with more than 1,000 lines is not supported because of the slow response times on these devices.

## BG Administrators in Business Groups with 10,000+ lines

MetaSphere EAS supports up to 40,000 lines, up to 4,000 Departments, and up to 10,000 Intercom Code Ranges in a single Business Group. This can be a combined MetaSphere EAS and MetaSphere CFS Business Group, or a MetaSphere EAS-only Business Group. If you have Clustered CFS, the limit is 20,000 lines: contact your support representative if you need more than 20,000 lines in a Business Group in a Clustered CFS deployment.

Any Business Group that either has, or will grow to have, more than 10,000 lines, must have the **Supports >10k lines** flag set in MetaView Web.

If a Business Group is designated as having more than 10,000 lines, it must be divided into Departments and each Business Group line must be in a department. In these Business Groups, you cannot create lines at the top level of the Business Group that are not in any department.

Each administrator will either be an administrator for the entire Business Group or just for particular Department(s) or sub-Department(s).

CommPortal BG Admin users whose admin department is the root department must select a department to view a list of lines in it, or to download call logs for the department. (Alternatively, they can search for lines by subscriber name or DN instead of selecting from a list.) Non-root BG Admin users will see only lines in their own department.

## 4.1 CommPortal BG Admin Home Page

A Business Group Administrator will initially see the Home page when logging in to the CommPortal BG Admin UI.

The CommPortal BG Admin UI Home page displays icons of all the services available to the BG administrator as well as listing them on a scrollable left-hand sidebar, both of which provide links to screens where the BG Administrator can view and configure each service.

**Figure 30: CommPortal BG Admin Home Page**

> **Note:**
>
> From V9.5.30, if the deployment has at least one DID subscriber configured in the Business Group, the BG Admin will see the left-hand menu entries and icons for the following SIP Trunking configuration options: **Trunk Groups** (under **Groups**), **Trunking Users** (under **All Lines**) and **Trunk Routing Policies** (under **Services**).
>
> From V9.5.40, if you have configured Call Service Groups in your deployment, BG Admins will also be able to see the left-hand menu entry and icon for **Call Service Groups** under **Groups**.

Icons and links that include a symbol indicate that clicking this will take you out of the CommPortal BG Admin interface. For example, clicking that symbol on the **Supervisor Dashboard** link opens the Integrated ACD Dashboard UI.

The left-hand sidebar also includes the following links.

- **Help**

- The BG Admin can click on this link to see information about the options on the particular page they are currently viewing.

- **Send Feedback**

  - The BG Admin can use this link to send feedback if they encounter problems using the CommPortal BG Admin UI. For more information, see Sending feedback on CommPortal on page 17.

# 4.2 Working with Groups

## 4.2.1 Hunt Groups (MLHGs)

BG Administrators can view and change the settings for any Hunt Groups (MLHGs) in their Business Group or Department.

A **Hunt Group** (also referred to as a **Multi Line Hunt Group or MLHG**) is a collection of Business Group lines.

- Calls to a Hunt Group are passed to the first non-busy line in the group, or to all non-busy lines simultaneously. If all lines are busy, then the caller is added to a queue. A Hunt Group may be used to create a small Call Center.

- A single Business Group can have a maximum of 1,000 Hunt Groups. If you are using Metaswitch's Integrated ACD product, you may only configure this service on a maximum of 10 Hunt Groups in a single Business Group.

- An MLHG may also be configured to include external lines that are not part of the Business Group to which the MLHG belongs. This is not enabled by default and is only permitted for MLHGs that do not use Integrated ACD.

The Hunt Groups page lists all of the Hunt Groups in the Business Group or selected department (not including those in sub-departments).

If you are using Metaswitch's Integrated ACD product in one or more Hunt Groups in a Business Group, this screen will also display the Service Level to indicate whether this Hunt Group can use either the Integrated ACD Basic and/or Premium service. If there is a limit on the number of licenses which can be used in the Business Group, the BG Admin will also be able to see how many ACD Basic and/or Premium licenses are currently available for use in this Business Group or Department. For more information about using Hunt Groups with Integrated ACD, see the *Integrated ACD Solution Guide*.

**Figure 31: Hunt Groups screen**

On this screen, the BG Administrator can

- select one or more Hunt Groups using the check-boxes and move the selected Hunt Group(s) between departments using the drop-down

- click on a Hunt Group to access the configuration screen for that Hunt Group.

On the configuration screen for an individual Hunt Group, the BG Admin can

- view details of Hunt Group Pilots and Hunt Group Members and access the configuration options for the member lines in the Hunt Group.

- add or remove member lines, or change the position of member lines within the group

- change settings, including

   - the name of the Hunt Group

   - whether new members can explicitly log in or log out of it by default

   - the call distribution algorithms.

## 4.2.2 Sim-Ring Groups (MADNs)

BG Administrators can view and change the settings for any Sim-Ring Groups (MADNs) in their Business Group or Department.

A **Sim-Ring Group** (**MADN**) is a single number that is associated with a number of Business Group Lines, or even other MADNs and MLHGs. When a caller dials a MADN, all the numbers associated with that MADN will ring at the same time. The call is connected to the first line that answers.

You can have multiple MADNs within each Business Group, up to a maximum of 1,000 MADNs in a single Business Group, and individual Business Group Lines can be members of more than one MADN.

The Sim-Ring Groups page lists all of the Sim-Ring Groups in the Business Group or selected department (not including those in sub-departments).



**Figure 32: SimRing (MADNs) Screen**

On this screen, the BG Admin can

- select one or more Sim-Ring Groups using the check-boxes and move the selected Sim-Ring Group(s) between departments using the drop-down
- click on the **Actions** drop-down alongside a Sim-Ring Group to view the group or individual line settings.

On these additional screens, the BG Admin can

- add or remove lines from the Sim-Ring group
- view and make changes to the member lines in the Sim-Ring Group
- view the current Call Limit Algorithm used for this Sim-Ring Group.

    Note that this setting can only be changed by the Service Provider.

## 4.2.3 Call Pickup Groups

BG Administrators can view and change the settings for any Call Pickup Groups in their Business Group or Department.

Incoming calls to a Business Group Line that is a member of a **Call Pickup Group** can be answered by any other member of the Call Pickup group, who simply presses a key to connect to that call.

The **Call Pickup Groups** page lists all of the Call Pickup Groups in the Business Group fragment or selected department (not including those in sub-departments).

Business Group Admin Portal                                                                           Andy Randall ▾

## Call Pickup Groups in Department: [View All ▾]

A Call Pickup Group (CPUG) defines a group of Business Group Lines within which the subscribers can use Call Pickup to answer each other's incoming calls.

Move selected to:   [Select department ▾]   [Move]

[Delete Selected]                                                                                    [Add Group]

| ☐ Call Pickup Group Name | Number of Members | Department |
|---|---|---|
| Search for... | | |
| ☐ Jeff's | 4 | MetaSwitch |
| ☐ Toms | 3 | MetaSwitch |

**Figure 33: Call Pickup Groups screen**

On this screen, the BG Admin can

- view all the currently-configured Call Pickup Groups
- add or delete Call Pickup Groups
- click on a Call Pickup Group to access the configuration screen for that Call Pickup Group.

On the Call Pickup Group Configuration screen, the BG Admin can

- add or remove lines from the Call Pickup Group
- access the configuration options for the member lines in the Call Pickup Group
- access a Settings screen where they can change the name of this Sim-Ring Group.

## 4.2.4 Trunk Groups

BG Administrators can use the Trunk Groups page to view and modify Trunking Destinations and Trunk Groups settings in their Business Group or Department.

**Note:**

The **Trunk Groups** page is only visible if the deployment has at least one DID subscriber configured in the Business Group.

The **Trunk Groups** page lists the Trunking Destinations in the specified Department. Trunking Destinations are collections of Trunk Groups that can share configuration and reach a particular set of subscribers, for example a PBX.

Trunking Destinations are identified in the CommPortal UI using the [icon] icon.

**Figure 34: Trunk Groups Page**

On this screen, the BG Admin can

- view all the currently-configured Trunking Destinations and the Trunk Groups within them, and see the currently configured call limits

- make changes to a Trunking Destination

  - clicking anywhere on a Trunking Destination launches an **Edit Trunking Destination** dialog box that allows the BG Admin to change its name or Calling Party Number

  - clicking on the **Action** button on the far right of a Trunking Destination reveals options to edit the trunking destination and also to view the lines currently assigned to the Trunking Destination

- make changes to a Trunk Group, either by clicking anywhere on the Trunk Group entry or expanding the **Action** button to launch an **Edit Trunk Group** dialog box where the BG Admin can change its name

- if **Allow BG administrators to control PBX call limits** is set in MetaView Web for the Business Group, use the edit dialog boxes to set call limits for total calls, terminating calls and originating calls for a Trunking Destination or Trunk Group

- select one or more Trunking Destinations and use the **Move** button to move them between Departments.

## 4.2.5 Call Service Groups

From V9.5.40, if Call Service Groups are configured in your deployment, BG Administrators can use the Call Service Groups page to view and modify Call Service Groups in their Business Group or Department.

A Call Service Group (CSG) can be used to share call service settings between subscribers in a Business Group or department.

- The Call Service Group can define the behavior for Calling Party Number, Unconditional Call Forwarding, Unavailable Call Forwarding and Call Barring for the subscribers who are assigned to it, allowing you to assign different configuration to different groups of subscribers within a Department or Business Group.
- If a subscriber who is assigned to a Call Service Group can also make changes to any of these call services, for example to configure a different call forwarding number, this will override the setting in the Call Service Group.

The **Call Service Groups** page lists the Call Service Groups currently configured in the Business Group and allows BG Admins to create and manage the CSGs in their specified Department.

| Business Group Admin Portal | BG Admin ▾ |
| --- | --- |

Call Service Groups in Department: | View All ▾ |

Move selected to: | Select department ▾ | Move |

| Delete Selected | | Add Group |
| --- | --- | --- |

| ☐ | Name |
| --- | --- |
| | Search for... |

☐ Sales - Enfield ⋯

☐ Sales - Edinburgh ⋯

☐ Sales - Coventry ⋯

**Figure 35: Call Service Groups Page**

On this screen, the BG Admin can

- view all the currently-configured Call Service Groups for this Business Group, filtering by Department if required
- select one or more Call Service Groups and use the **Move** button to move them between Departments
- click **Add Group** to add a new Call Service Group

- remove a Call Service Group, by ticking the checkbox to select the Call Service Group and then clicking on **Delete Selected** to delete it.

  - BG Admins can only delete a CSG that has no lines assigned to it.

- click on the **Action** button on the far right of a Call Service Group to reveal options to edit the CSG and view the lines that are currently assigned to it

- click on the Call Service Group name or use the **Edit Call Service Group** option on the **Action** button to launch the following page where they can edit the CSG



**Figure 36: Editing a Call Service Group**

- The **Group Settings** tab allows the BG Admin to change the name of the Call Service Group. This name must be unique within the Business Group.

- The **Call Services Settings** tab allows the BG Admin to configure and define the settings for Unconditional Call Forwarding, Unavailable Call Forwarding and Call Barring for this Call Service Group.

  If you have set up your deployment to allow BG Administrators to configure the calling party number (in MetaView Explorer or MetaView Web), the BG Admin can also use this tab to change the calling party number that is presented on outgoing calls made by the subscribers in this Call Service Group.

The BG Admin will use options on the **Lines** page to control which subscriber lines are assigned to Call Service Group. For more information, see Business Group and Department Lines on page 57.

### 4.2.6 Supervisor Dashboard

If your deployment includes Integrated ACD, BG Admins who are also ACD Supervisors can access the Supervisor Dashboard directly the CommPortal BG Admin UI.

**Integrated ACD** (Automated Call Distribution) is a separately-licensed CommPortal component that provides BG Administrators with detailed information about the activity of the MLHGs that they are managing.

If the BG Admin is also an ACD Supervisor, they will see the **Supervisor Dashboard** link on the CommPortal BG Admin UI. Clicking this link launches a new browser window that enables the administrator to view a range of graphs for all the MLHGs that they administer (Department Administrators will only see their department and, if configured, sub-departments).

If you are using the Premium ACD service level, BG Administrators will also be able to use this window to manage a number of additional supervisory features for monitoring MLHG members, including the ability to listen in on or participate in an MLHG member's call. BG Administrators who are also ACD Supervisors will also be able to use this screen to launch the ACD Report Scheduler to generate and schedule reports on MLHG activity.

For extensive information on the statistics and features offered through Integrated ACD, refer to the *Integrated ACD Solution Guide.*

## 4.3 Working with Lines and Phones

### 4.3.1 Business Group and Department Lines

BG Administrators can view and change the settings for all the lines in the Business Group or Department for which they are an administrator.

The **All Lines** page displays all the lines in the selected Department, using icons to indicate lines of a particular type, for example Auto Attendants, Sim-Ring Groups or Trunking Users.

**Figure 37: All Lines Screen**

> **Note:**
>
> The **Trunking Users** option in the left-hand menu, and the **Assign Routing** button and **Routing** column on the **All Lines** page, are only visible if the deployment has at least one DID subscriber configured.
>
> From V9.5.40, this screen may also include a **CSG** column that indicates if a line belongs to a Call Service Group and an **Assign to Call Service Group** button at the top that allows the BG Admin to assign one or more selected lines to a CSG. See Call Service Groups on page 55 for more information.

The BG Admin can click on links in the left-hand menu to filter the screen to display only lines of that type.
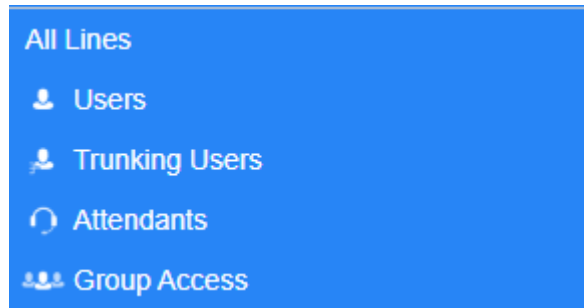
**Figure 38: All Lines sidebar menu**

- Selecting the **Users** screen displays all individual Business Group lines.

- Selecting the **Attendants** screen displays any lines configured as Easy Attendant or Premium Attendant lines.

- If enabled in your branding, selecting the **Trunking Users** screen displays any lines assigned to a Trunking Destination or Routing Policy. The BG Admin can use this filter screen to

    - view the Routing configuration for these lines

    - use the **Assign Routing** button to launch a dialog box where they can assign either a Trunking Destination or a Routing Policy to one or more selected lines

- Selecting the **Group Access** screen displays any lines configured as Sim-Ring or Hunt Group Pilot lines.

There are a range of options on these pages.

- On the main **Lines** page, the BG Admin can use the **Download all Lines** button to download a CSV file which contains information about all the lines in this Business Group. This CSV file contains the name, DN and department of each line, ordered by the department to which the lines belong. There is a brandable option to also include the MetaSphere EAS Class of Service and MetaSphere CFS Persistent Profile for each line.

- On all the pages, the BG Admin can use the **Search for** text box to search for any value in the table to find a particular line.

    - The search will be restricted to the Department selected at the top of the screen. Selecting **View All** opens a drop-down which displays a list of Departments, along with a search facility. When the **View All** option is selected, a Department column is shown in the results table so that the administrator can easily see where the line is located.

    - The drop-down box on the right of the search field enables the BG Administrator to specify whether the search should be applied either in any field or just to a specific column.

    - The information of each column will be checked against the characters entered in the textbox, and just the lines that have matches are shown with the relevant matches highlighted. The list is updated as the characters are entered.

    - The BG Administrator can also use the search facility to list all the administrators in the selected Department, by entering `admin` in the search textbox.

- The BG Admin can use the **Move** button to select one or more lines and move them between Departments.

- The BG Admin can use the **Actions** icon alongside a line to launch popups that allow the administrator to carry out a number of actions. Note that not all of these are applicable to all line types.

  - **View individual settings** for that line.

  - **Edit personal details** for that line, including changing the name and, where appropriate, designating the line as a BG Administrator or, for Trunking Users, setting a Calling Party Number or DID code.

  - **Assign routing** for a Trunking User line.

  - **Assign to Call Service Group** to assign the line to a Call Service Group. (See Call Service Groups on page 55 for more information on using CSGs to define a set of call forwarding and call barring services.) This option is not displayed for PBXs because these cannot be assigned to a CSG.

  - **Add services** for the line. This launches a pop-up where the BG Admin can subscribe the line to additional call services, for example Call Blocking.

  - **Reset line**. Clicking this link enables the BG Administrator to allocate this line to a different subscriber. See Resetting a Business Group line on page 61 for more information.

  - **Unlock account**. Clicking this link enables the BG Administrator to unlock a line, for example if a subscriber has incorrectly entered their PIN or password multiple times and been locked out, or a BG Administrator has previously locked the line so that it cannot be used. This option is only displayed if the action to unlock an account is enabled in the CommPortal customization.

## Large Business Groups

MetaSphere EAS supports up to 40,000 lines, up to 4,000 Departments, and up to 10,000 Intercom Code Ranges in a single Business Group. This can be a combined MetaSphere EAS and MetaSphere CFS Business Group, or a MetaSphere EAS-only Business Group. If you have Clustered CFS, the limit is 20,000 lines: contact your support representative if you need more than 20,000 lines in a Business Group in a Clustered CFS deployment.

Any Business Group that either has, or will grow to have, more than 10,000 lines, must have the **Supports >10k lines** flag set in MetaView Web.

- In these Business Groups, all lines must be in a Department. If there are any lines in the root department, a warning is shown to prompt the BG Admin to move these into a sub-department.
- A warning will also be shown if a Business Group that has not been designated as having more than 10,000 lines now exceeds 10,000 lines.
- A BG administrator for these Business Groups will see lines based on their admin Department.
  - If they are a BG Admin only for one or more Departments, they will see only lines in those Department(s).
  - If the BG Admin's admin Department is the root Department, they will not see a list of all lines but will be asked to select a Department (which could be the root Department).
  - If the BG admin is an administrator for the entire Business Group, they will see all the lines within the Business Group.

- BG Admins do not see a **Select All** checkbox on **Move** or **Assign Routing** operations, but can only select up to 50 lines at a time.

### 4.3.1.1 Resetting a Business Group Line

How to reset a Business Group line so that it can be used by another subscriber.

**Attention:**

Resetting an account is a significant change that takes a few seconds to complete, and *cannot be reversed*. The existing account is stripped - all messages and contacts are deleted, personal settings and schedules are removed and service options are returned to the Class of Service values. Subscribed services are still available, but may be disabled awaiting reactivation by the new subscriber.

The **Reset Line** option on the **Lines** page allows the BG Administrator to allocate the selected line to a different subscriber. Resetting a line removes all the current data associated with the line, including any call lists.



**Figure 39: Resetting a Business Group Line**

To reset a Business Group line:

- On the BG Admin **Lines** page, the BG Administrator clicks the **Actions** menu drop-down alongside the line, then selects the **Reset line**.
- This launches a pop-up with the telephone number for the line pre-populated, where the BG Administrator can enter the following information.

  - The new account name.
  - Whether to use the account name as the local calling name (this option is ticked by default).
  - Whether to remove the line from all groups (this option is ticked by default). If the subscriber is a member of a Call Service Group and this option is not ticked, the subscriber is not removed from its CSG but all call settings that can be inherited from CSGs are restored to the CSG defaults.

- The BG Administrator then clicks **Apply**. They will see a confirmation pop-up warning them that this action will lose all data for the line and cannot be undone. Clicking **Confirm** resets the line, or **Cancel** aborts the change.

- The BG Administrator then sees a New User Details pop-up showing the new account name, directory number and all PINs/passwords. These passwords will be set to randomly generated numeric or alphanumeric sequences.

- The BG Administrator can then copy and paste this information into an email and send it to the new user.

- The new MetaSphere EAS account will be uninitialized and the subscriber will need to set a new TUI PIN/CommPortal password and record a spoken name and initial greeting when they log in for the first time.

### 4.3.2 Business Group Phones

BG Administrators can assign phones to lines in the Department or Business Group, and click a link to launch the CommPortal Phone Configurator where they can view and make changes to phone profiles.

The **Phones** page lists all the SIP phones in the Business Group or Business Group fragment or selected department.

**Figure 40: Phones screen**

The BG Admin can

- view the status of all the phones in the selected Department - the question mark icon indicates if a phone is not currently able to be used, for example because the phone has not been authenticated
- use the checkbox to select a phone or click on the phone and then assign it to a department or line
- click on the phone icon to launch a pop-up to change the phone configuration
- click on the **Actions** menu to change or configure the phone
- click on the **manage your phone profiles** to launch the CommPortal Phone Configurator. For more information on using this interface, see the *MetaView SIP Provisioning Server Guide*.

# 4.4 Working with Business Services

## 4.4.1 Business Group Departments

The BG Administrator can make changes to the configuration for all the Departments for which they are administrators.

On the **Departments** screen, the BG Administrator can view details of all the Departments for which they are an administrator, and also add new departments.



**Figure 41: Departments Screen**

The BG Admin can use the **Search for …** box to find a particular Department. If you have a very large Business Group with a lot of Departments, this search will only show up to 1,000 Department matches.

The BG Admin can click on any of the existing departments on this screen to launch a pop-up where they can

• rename the department

> **Attention:**
>
> If you rename a department, you will no longer be able to filter call logs based on the previous name of the department. You can only access call data from the department prior to its renaming by selecting department `Any` when setting the parameters for call activity reports or downloading call logs. For more information on using Call Reports, see Business Group Call Reports on page 71.

• enter or change the operator number for the department
• set limits on the number of incoming and outgoing calls that the department can make.

## 4.4.2 Trunk Routing Policies

The BG Administrator can edit existing and create new Trunk Routing Policies that are used by Trunk Groups, in deployments that use the SIP Trunking feature.

> **Note:**
>
> The **Trunk Routing Policies** page is only visible if the deployment has at least one DID subscriber configured in the Business Group.
>
> Service Providers can also edit Trunk Routing Policies using MetaView Web.

On the **Trunk Routing Policies** screen, the BG Administrator can view and manage existing Trunk Routing Policies, see which Trunks Groups are using them, and create new Routing Policies. When the **Trunk Routing Policies** page is open, the left-hand side menu expands to show the names of up to ten Routing Policies.



**Figure 42: Trunk Routing Policies Page**

The **Trunk Routing Policies** page also shows up to 10 routing policies, for each one displaying its name, a brief summary of its contents, and its Department. If the deployment has more than 10 routing policies, the BG Admin can use the **Search for …** box to search on the policy name to find a particular Routing Policy.

The BG Admin can

- click on the Routing Policy in the left-hand sidebar to open the screen described in Editing a Routing Policy on page 66.
- select a Routing Policy on the **Trunk Routing Policies** page and
    - click the **Move** button to move it to another Department

- click the **Delete Selected** button to delete it. Routing Policies can only be deleted if they are not being used by any Trunking Users. If the BG Admin tries to delete a Routing Policy that is in use, a warning is shown and the policy is not deleted.

- click the **Add Routing Policy** button to launch a screen and add a new routing policy

- click the **Actions** button alongside a Routing Policy and choose from one of the following options:

  - **Edit Routing Policy** - this opens a screen where the Routing Policy can be managed, as described in

  - **Clone Routing Policy** - this opens the Add Routing Policy screen with all fields pre-filled, which is useful if the BG Admin wants to add a very similar Routing Policy

  - **View assigned lines** - this opens the Trunk Group screen with the search field pre-filled for that Routing Policy

### Editing a Routing Policy

Clicking on a Routing Policy in the left-hand sidebar or selecting **Edit Routing Policy** from the **Actions** button menu launches the **Edit Routing Policies** page.

## Routing Policy Support in Department: Enfield

| Clone Routing Policy |
| --- |

| Trunk Groups | Settings |
| --- | --- |

| Remove Selected | Change Positions | Add Trunk Groups |

| | Position | Trunk Group Name | Trunking Destination |
| --- | --- | --- | --- |
| ☐ | 1 | PBX SIP LINE 1 | (214) 555 1551 |
| ☐ | 2 | PBX SIP LINE 2 | (214) 555 1551 |
| ☐ | 3 | PBX SIP LINE 3 | (214) 555 1551 |

**Figure 43: Edit Routing Policies Page**

The screen opens on the **Trunk Groups** view and displays the names of the Trunk Groups used by this Routing Policy and, if the policy uses a lowest available or round robin method, a **Position** column showing the order of Trunk Groups to try. If the policy uses the weighted method, the screen instead displays **Priority** and **Weight** columns, ordering the list by priority.

The BG Admin can

- use the **Clone Routing Policy** button to launch the **Add a Routing Policy** screen with all the fields pre-filled

- remove a Routing Policy by ticking the checkbox alongside it and clicking the **Remove Selected** button

- use the **Change Positions** button to launch a screen that has up and down arrows (if the Routing Policy uses the lowest available or round robin method)

- use the **Add Trunk Groups** button to launch a screen and add Trunk Groups to a Routing Policy

- click on a Trunk Group to launch a screen and edit its priority and weight within this Routing Policy (if the deployment uses the weighted method).

The **Settings** screen displays the settings for the selected Routing Policy, allowing the BG Admin to edit the name, Trunk Group selection method, Trunk Groups limits and the fallback behavior.

## Routing Policy Support in Department: Enfield

| Clone Routing Policy | |
|---|---|
| Trunk Groups | Settings |

Apply  Cancel

| | |
|---|---|
| Routing Policy Name: | Support Team |
| Department: | Enfield |
| Trunk Group selection method: | Ordered ▼ |
| Trunk Groups limit: ❓ | 10 |
| Fallback: ❓ | ⦿ Do nothing |
| | ◯ Forward to |

**Figure 44: Routing Policy Settings screen**

## 4.4.3 Business Group Short Codes

The BG Administrator can view and make changes to the short codes used in a Department or Business Group.

**Short Codes** allow subscribers to call a number by dialing a short code rather than the whole number.

On the **Short Codes** screen, the BG Admin can see all of the Short Codes in the Business Group fragment or selected department (not including those in sub-departments).

From V9.5.30, up to 1,000 single short codes and short code ranges that map to Business Group contacts, for example off-switch extensions, can be configured to include a name to make them easier to identify. If a short code with a name is configured with a full national or international number, the Calling Party Name on calls placed from that short code to the BG line will show the short code name. However, Caller ID on outgoing calls from the short code to a named BG member will be the full phone number. All named individual short codes will be included as a Business Group contact and extension in the business address book that is then available to browse in the CommPortal UI.

**Business Group Admin Portal**

## Short Codes in Department: [ View All ▼ ]

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

Move selected to: [ Select department ▼ ] [ Move ]

[ Delete Selected ]                                   [ Add ] [ Add Range ] [ Import ] [ Export All ]

| ☐ Short Code | Name | Telephone Number or Service Access Code | Department |
|---|---|---|---|
| Search for... | | | |
| ☐ *2001 | Enfield Sales | (555) 111 0001 | London |
| ☐ *2002 | Enfield Support | (555) 111 0002 | London |
| ☐ *2003 | Enfield Acco… | (555) 111 0003 | London |
| ☐ *2004 | Central HR | (555) 111 0004 | None |
| ☐ *2005 | Central Help… | (555) 111 0005 | None |

**Figure 45: Short Codes screen (after upgrade to V9.5.30)**

The BG Admin can

- click on an existing Short Code to launch a pop-up where they can edit it
- use the buttons at the top of the screen to

    - move a selected Short Code to another Department
    - delete one or more selected Short Codes
    - add a single Short Code or a range of Short Codes
    - from V9.5.30, export existing short codes and perform a bulk import of new short codes and/or short code ranges in CSV format.

        - This function is only available to root BG Admins and in Business Groups where force simple matching is set to true in the dialing plan.
        - To import new short codes, we recommend that the root BG Admin uses the **Export All** button to export a CSV file of all existing short codes in the Business Group to which they can add new short codes or short code ranges in the same format and then import.

            CSV files can be viewed and edited using Microsoft Excel, but any leading zeros will be removed, large numbers converted to scientific notation, and other characters may be changed unless UTF-8 encoding is used. To avoid data corruption, root BG Admins must use the **From Text/CSV button** to import the short codes CSV file into Excel and select

UTF-8 encoding and also follow the instructions in Keeping leading zeros and large numbers on Microsoft's Support portal to retain any leading zeros or large numbers.

## 4.4.4 Business Group Account Codes

The BG Administrator can configure the Business Group's Account Code settings, and create and edit a list of Validated Account Codes.

**Note:**

Only the root BG Administrator for the whole Business Group fragment can access the Account Codes page.

On the **Account Codes** screen, the BG Administrator can see which types of call require an account code to be entered before they can be made, and, if account codes have been assigned, a list of these account codes.



**Figure 46: Account Codes screen**

On this screen, the BG Admin can

- edit the list of assigned account codes

- use the checkboxes to mark which call types require account codes

- choose whether or not to use validated account codes (so that subscribers must enter a specific code before making a call of a particular type)

- set the account code length (1-15 characters)

- set the maximum number of incorrect attempts to enter an account code before the account is blocked (1-100 attempts)

- choose whether or not call types and Account Code length can be overridden on a per line basis

- choose whether or not Business Group Lines can view and change their own account codes

## 4.4.5 Business Group Extensions

The root BG Administrator can view and configure the extensions that can be used in their Business Group or Department.

**Note:**

Only the root BG Administrator for the whole Business Group fragment can access the Extensions page.

On the **Extensions** screen, the root BG Administrator can see all the extensions that are currently configured in the Business Group or Department. These extensions can be used to quickly dial other numbers in the Business Group.



**Figure 47: Extensions screen**

On this screen, the root BG Admin can

- use the **Search for …** box to find the extension they want - if this is a very large Business Group, this search will only show the first 1,000 matches

- delete selected extensions

- add a single extension, or a range of extensions
- click on an extension to launch a pop-up where they can edit it.

## 4.4.6 Business Group Call Reports

BG Administrators with the appropriate permissions can use the BG Admin Call Reports screen to view and schedule a range of call activity reports and download call logs in csv format.

**Note:**

From V9.5.30, Business Group Call Reports is the new name for Business Group Call Analytics.

The **Call Reports** menu option will only be displayed if you have licensed Call Reports.

The information that a BG Admin sees when they click on the **Call Reports** menu button depends on the permissions that they have.

- If the BG Admin can access Call Reports reports, they will see the screen described in Call Reports Summary and Reports on page 71.
- If the BG Admin only has permission to download call logs as raw csv data, they will only see the screen described in Download Logs on page 75.

### Call Reports Summary and Reports

Clicking on **Call Reports** on the left-hand menu launches the following **Summary** screen.
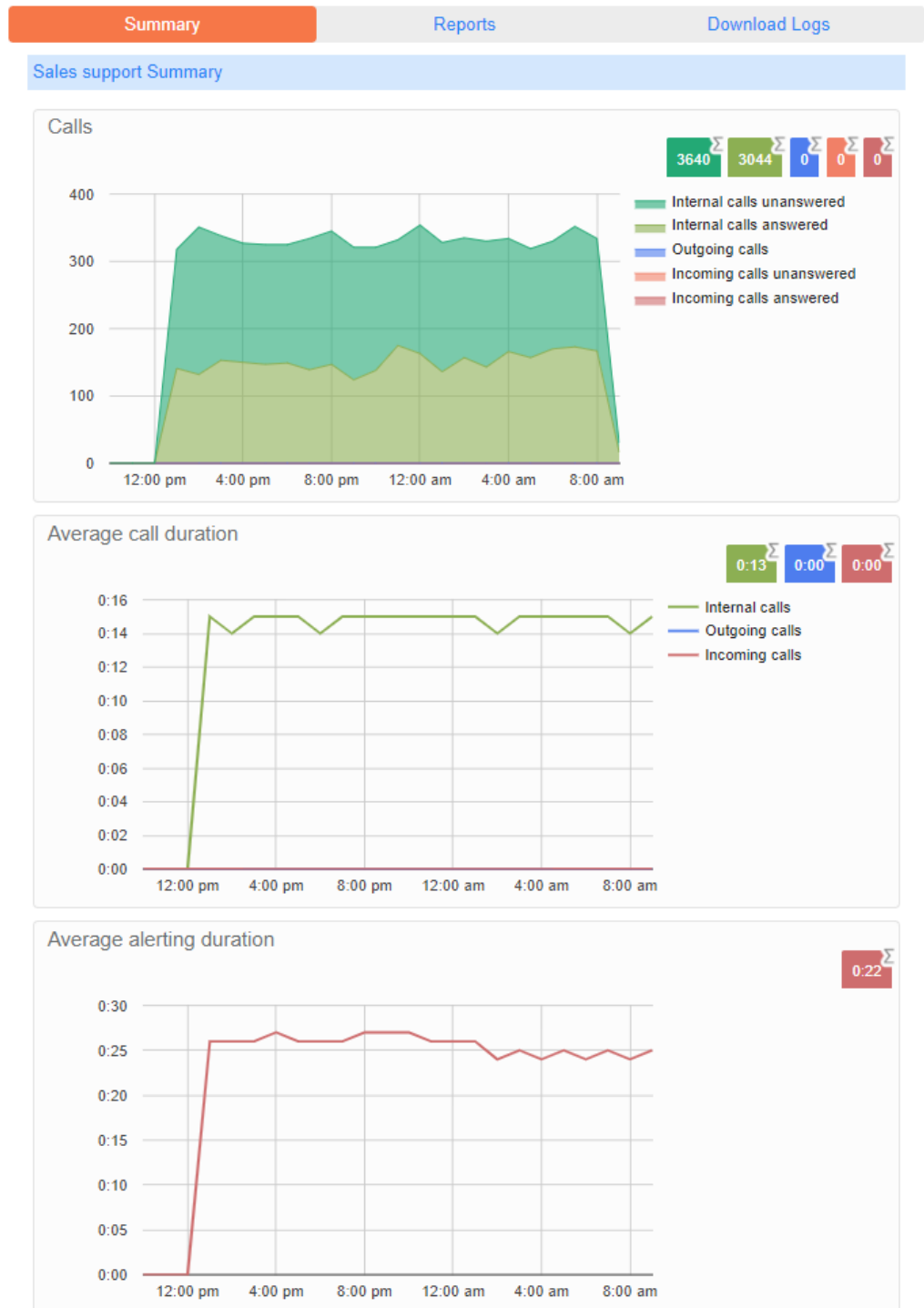
**Figure 48: Call Reports Summary screen**

On this screen, the BG Admin can view summary reports on calls, average call duration, and average alerting duration for the Department or Business Group that they administer, and click on the **Reports** and **Download Logs** tabs to create or schedule new reports and download call logs.

BG Admins who are root administrators in Business Groups configured to support more than 10,000 lines will not see the summary graphs on this screen.

**Reports**

Clicking the **Reports** tab launches the following screen where BG Admins can create reports.

## Call Reports

| Summary | **Reports** | Download Logs |
| --- | --- | --- |

**Manage Reports**   **New Report**
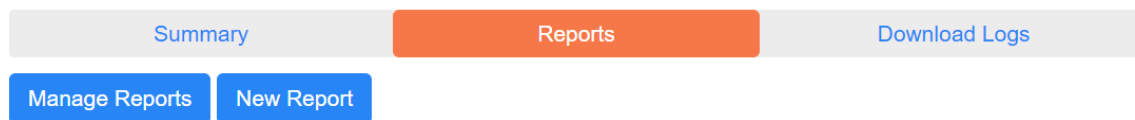
Reports provide a way to visualize call activity more easily than via Raw Call Logs. There are several different report types for analyzing call activity from different angles.

Reports may be viewed directly or may be saved so that they can be automatically generated in the future and emailed to specified recipients.

**Figure 49: Reports Screen**

The BG Admin can click **New Report** to launch the screen where they can create a new report, as described in Adding a new report on page 73.

BG Admins with permission to schedule reports will also see the **Manage Reports** button. Clicking this launches the Report Schedule Manager screen described in Report Schedule Manager on page 75.

### *Adding a New Report*

BG Admins can reach the new report screen either by clicking the **Add a new Report** button on the **Report Schedule Manager** screen (if they have permission to schedule reports) or by clicking on the **New Report** button on the **Reports** screen.

Reports for business group 'stats'          Send Feedback | Clone | Save | Cancel

| | | Data range | | |
| --- | --- | --- | --- | --- |
| Report Title: | | Period: | 10/06/2017 | * | 10/06/2017 |
| Report Scope: | ⦿ ACD ○ BG | Start of day: | 00 ▾ : 00 ▾ | | |
| Report Type: | Calls by Day ▾ | End of day: | 24 ▾ : 00 ▾ | | |
| Select Data: | All queues ▾ | **M** **T** **W** **T** **F** **S** **S** | | | |
| Schedule: | One Off ▾ | | | | |

**Figure 50: Creating a new report**

On this screen, the BG Admin can

- use the **Clone** button to create a new report that uses the same parameters and filters as a previous report (if they have already scheduled a report of this type)
- choose a free-form title for their report

- if they are also an Integrated ACD Supervisor, select the **BG** radio button to set the Report Scope

- use the drop-down to select the type of report from the following options:

  - **Account Statistics** - outbound call statistics, shown by account codes

  - **Call Duration Summary** - shows the length of incoming and outgoing calls

  - **Call Log** - detailed overview of calls, where DNs and Account codes are links when viewed in the CommPortal BG Admin UI to filter the report by that DN or Account code

  - **Frequent Caller Summary** - the DNs of callers who made the most incoming calls

  - **Frequently Called Summary** - similar to Frequent Caller Summary, but grouped and ranked using the target DN rather than the source DN

  - **Location Analysis** - shows the location of incoming and outgoing calls, based on DN and location information configured in the CommPortal customization used by the BG Admin

    - The Location Analysis report is not included by default but must be explicitly enabled in the CommPortal customization.

  - **Long Ringing Time** - contains any incoming calls that rang for longer than a configured threshold

  - **Missed Calls Summary** - shows a high level summary of incoming calls that were not connected (calls answered by an automaton, for example voicemail or an auto attendant count as connected)

  - **Missed Calls Detail** - shows all incoming calls that were not connected (calls answered by an automaton, for example voicemail or an auto attendant count as connected)

  - **Short Calls**  - shows answered incoming calls that were shorter than a customizable threshold, set by default to 5 seconds, for example to indicate when a caller was connected to an auto attendant or a voicemail service and hung up without taking any further action

  - **Top Talkers** - call data for BG lines including total and answered calls and data on call duration, ordered by total call duration

  - **Traffic by Day** - call data arranged by day

  - **Traffic by Hour** - call data arranged by hour

  - **Unreturned Calls Detail** - this is the same as Missed Calls Detail but minus any calls that were subsequently connected during the period of the report

  - **User Statistics** - data on calls and call duration by Business Group line

- filter the data by Department, Line, or Account Code

  - if using a Line filter, the full DN must be used

  - if the BG Admin enters both a Department and a Line, and the Line is not in that Department, then this will match calls between that Line and anyone in the Department

  - if the BG enters both a Department and an Account Code, this will match all calls from that Department using that Account Code - if the Account Code relates to a single customer, then this report would collate all outgoing calls from different lines to that customer.

- set a data range for the report.

If the BG Admin does not have permission to schedule reports or wants to view the report on screen, they will then press the **Update Report** button at the foot of the screen to see the report on screen.

Some of the reports have links that allow the admin to drill down further into the detail of the report, for example to filter the report by DN or account code.

If the BG Admin can schedule reports, they will see additional fields where they can choose either to generate a one-off or scheduled report, and enter one or more email addresses for recipients who should receive a copy of the report in pdf and csv format, before pressing the **Update Report** button to schedule the report.

### *Report Schedule Manager*

BG Admins with permission to schedule reports can use the Report Schedule Manager screen to see details of all their existing scheduled reports.
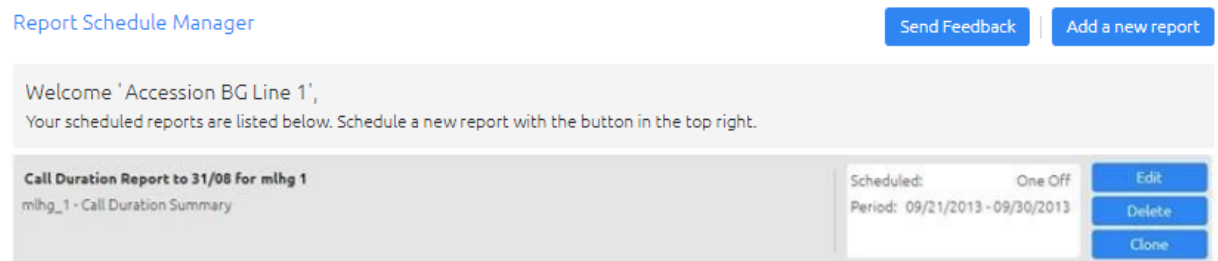


**Figure 51: Report Schedule Manager**

- The sub-title for each report shows the scope and will be built up from [department] [line] [code].
- The BG Admin can click the **Edit** button to view the report.
- The BG Admin can click the **Clone** button to create a new report that uses the same parameters and filters as the previous report of that type.
- If this BG Admin is also an ACD Supervisor, this screen will also display any reports generated on ACD activity and will identify which reports apply to the BG and which to the ACD.

## Download Logs

Clicking the **Download Logs** tab launches the following screen.

As noted above, BG Admins who can download call logs but do not have permission to access Call Reports will see this screen as soon as they click on **Call Reports** on the left-hand menu.

**Figure 52: Download Logs Screen**

On this screen, the BG Admin can

- request a report in CSV format containing the logs of all calls made (up to a month at a time) to and from lines within their administration domain (whole business group or department and sub-departments), including calls to MLHGs within the Business Group or department
- filter call logs specifying a date range, and/or by department domain if the Business Group has them.

  Error messages are displayed if any of these filters are set to incorrect values. The UI will validate these filters once the **Download** button is clicked, and then display a dialog box while the report downloads. The BG Admin cannot access the main page or navigate to another page during this process, although they can cancel the operation.

**Attention:**

If this Business Group has over 10,000 lines, the BG Admin must filter the call logs by selecting a Department. It is not possible to download call logs for the entire Business Group in a single operation.

Once downloaded, the csv report files can be opened in a spreadsheet application such as Microsoft Excel.

The downloaded report contains the date and time of each call made or received, in the configured time zone of the administrator requesting the download. Note that, unlike Reports, the call duration shown includes any alerting time.

## 4.4.7 Business Group Call Recording

The BG Administrator can click on the Call Recording menu button to access the default Call Recording Server where they can configure their call recording service.

**Note:**

The Call Recording tab is only visible if you have a MetaSphere CFS and Call Recording is enabled for the Business Group via the Business Group's Persistent Profile.

If intra-Business Group Call Recording is enabled for the Business Group, calls made between two subscribers within the same Business Group (using an intercom code) are recorded. If Call Recording warning tones are enabled for the Business Group, a warning tone is played at the start of, and during, all recorded calls.

The BG Administrator can also use the CommPortal BG Admin interface to enable or disable Call Recording for a Business Group line, as described in CommPortal Call Settings Page on page 37.

**Attention:**

If you enable call recording for a Business Group line, you must ensure that you are complying with any regulatory requirements, for example to play an announcement as soon as the call is connected to tell a caller that their call is being recorded.

For more information about Call Recording, please refer to the documentation that accompanies your MetaSphere CFS.

## 4.4.8 N-Series Music on Hold and Auto Attendant

If you deploy any N-Series Music on Hold and/or Auto Attendant servers, the BG Administrator can access configuration pages for these servers directly from within the CommPortal BG Admin UI.

The BG Administrator can click on the **Auto Attendant** and **Music On Hold** links to configure these N-Series services. This will open a new window containing the appropriate configuration interface.

For more information on using these N-Series configuration interfaces, please see the *N-Series Auto Attendant User's Guide* or the *N-Series Music On Hold User's Guide*.

## 4.4.9 MaX Meeting Licenses

If you deploy MaX Meeting for Large Meetings and/or Meeting Webinars, the BG Administrator can use the CommPortal BG Admin UI to allocate licenses to lines within a selected Department.

On the Meeting Licenses screen, the BG Admin can see how many licenses for Large Meetings and Webinars are available in the selected Department and where these are currently allocated.

**Note:**

This screen only shows the license allocation for Large Meetings and Webinars.

You may have subscribers in this Business Group who are only permitted to create small Meetings of up to 4 attendees. This setting is controlled by the subscriber's Class of Service. You cannot allocate a license for Large Meetings or Webinars to any subscribers using this Class of Service.



**Figure 53: Meeting Licenses screen**

The BG Admin can change which licenses are allocated to which lines in the following ways.

• The BG Admin can use the checkboxes on the left to select one or more of the lines in the Department and then press **Manage selected Licenses**.

• The BG Admin can click on an individual line.

Both these actions launch a pop-up where the BG Admin can use the radio buttons to make changes to Large Meeting and/or Webinar license allocation for one or more lines. Selecting `None` removes all licenses of that type from a line.

## Modify Licenses

Unallocated licenses:

Large meeting    200  33    300  8    500  3

Webinar    100  0    500  25    1K  20    3K  10    5K  5    10K  0

Modify the license assignments for the subscriber using the table below.

To remove licenses from this subscriber, select "None".

| Large meeting licenses |
| --- |

○ 200    ○ 300    ○ 500    ◉ None

| Webinar licenses |
| --- |

○ 100    ○ 500    ○ 1K    ○ 3K    ○ 5K    ○ 10K    ◉ None

[ Save ]    [ Cancel ]

**Figure 54: Modify Licenses Pop-up Screen**

The *MaX Meeting Deployment Guide* available on the Metaswitch Support Community (https://communities.metaswitch.com/manuals/latestindex/3525) contains full instructions for using CommPortal BG Admin to manipulate Meeting licenses.

## 4.4.10 Business Group Miscellaneous Settings

The BG Administrator can use the Misc. Settings screens to view a range of settings for their Business Group or Department.

On the **Misc Settings** screen, the BG Admin can see the following screens.

- Number Blocks on page 79
- External Calls on page 80
- Trunk Calls on page 80
  - This screen is only visible if the deployment has at least one DID subscriber configured.
- Call Notifications on page 81
- Other Settings on page 82

### Number Blocks

On the **Number Blocks** screen, the BG Admin can see a list of the Telephone Number Blocks in their Department or Business Group, and the number of lines that are currently allocated in each block.

**Figure 55: Business Group Misc Settings Number Blocks screen**

## External Calls

On the External Calls screen, the BG Admin can see if there are any limits on calls made outside of the Business Group or Department as well as the codes set for local, long distance and international carriers.



**Figure 56: Business Group Misc Settings External Calls Settings screen**

## Trunk Calls

The **Trunk Calls** screen displays read-only information about enterprise call limits for SIP Trunking.

> **Note:**
>
> The **Trunk Calls** screen is only visible if the SIP Trunking feature is enabled in the CommPortal branding and the deployment has at least one Trunking Destination (for example, a PBX) configured. It can only be seen by a root administrator.

**Figure 57: Business Group Misc Settings Call Limits Screen**

Call limits for individual Trunk Groups and Trunking Destinations can be edited on the Trunk Groups page described in Trunk Groups on page 53.

## Call Notifications

The BG Administrator can use the **Call Notifications** screen to enable or disable Emergency Call Notifications and, if these notifications are enabled, configure the targets who will receive either an email or outdial notification whenever an emergency call is made by one of the lines in the Business Group

**Note:**

The Call Notifications tab is only visible if the Business Group is subscribed to the Outgoing Calls Notifications service.



**Figure 58: Business Group Misc Settings Emergency Call Notifications screen**

The root BG Administrator can click **Disable Emergency Call Notifications** to turn call notifications off. When Call Notifications are disabled, this button displays **Enable Emergency Call Notifications**.
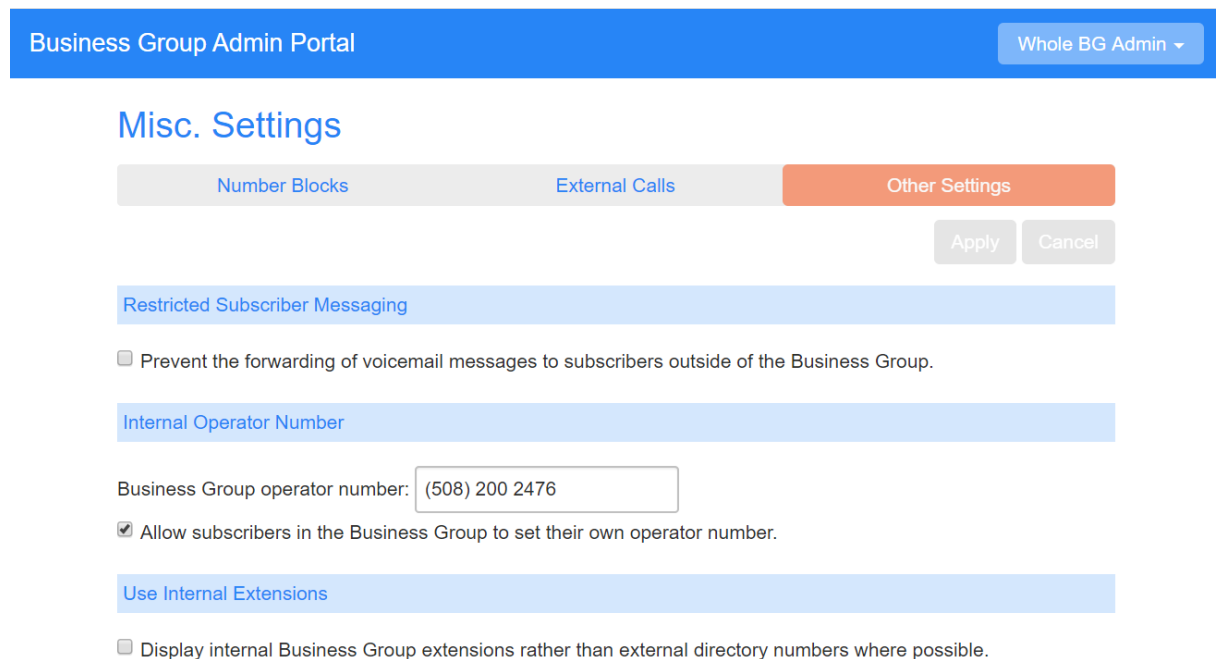
On this screen, the BG Admin can

- view the Call Notifications which are already configured

- use the **Add New** button to launch a pop-up illustrated below, where they can select a Department and add details for the recipients who should receive either an email or a telephone call whenever a line in that Department makes an emergency call

- use the **Actions** drop-down alongside a Department to edit the existing lists for that Department or to clear them. Clicking on **Edit** launches the same pop-up as the **Add New** button.

> **Attention:**
>
> After making a change to the Call Notification configuration for a Business Group, you may see no change in behavior for up to 5 minutes.

## Other Settings



**Figure 59: Other Settings Screen**

On the **Other Settings** screen, the BG Admin can configure the following options.

- **Restricted Subscriber Messaging** - set whether members of this Business Group can send voicemail and fax messages only to other members of the same Business Group.

- **Internal operator number** - enter the number used to access this Business Group's operator.

  - The **Allow subscribers in the Business Group to set their own operator number** checkbox controls whether Business Group subscribers can use the **Call Settings** page in the CommPortal Web UI (described in CommPortal Call Settings Page on page 37) to enter an individual call transfer number.
    From V9.5.40, Business Group Administrators can allow Business Group subscribers to enter their own call transfer number that will override the default operator number set for the Business

Group or Department. This number will then be used when a caller who is listening to the voicemail menu on a subscriber's mailbox chooses the option to be transferred to an operator rather than leaving a message. For example, a subscriber may want to divert these calls to a mobile device rather than the office receptionist.

- **Use Internal extensions** - choose whether or not CommPortal displays the Business Group extension number associated with a directory number where possible.

# 5 Features for PBX Administrators

> **Note:**
>
> From V9.5.30, you can enable the SIP Trunking feature in your branding so that PBXs can be managed using the CommPortal BG Admin UI, as described in Features for BG Administrators on page 47. In the BG Admin UI, any PBXs are shown as Trunking Destinations and the DID lines as Trunk Groups, alongside other lines in the Business Group.

If your deployment offers PBXs, you can deploy a customized CommPortal UI and make it available to users who log in to your PBX using its main number, also referred to as the Listed Directory Number (LDN). These users will typically be your PBX administrative staff.

This CommPortal PBX Administrator UI allows your administrators to change the settings for the PBX as a whole, and also to view and administer the DID (Direct Inward Dial) lines within the PBX.

Subscribers with DID lines will use their DID number to log in and will also see the CommPortal UI for individual lines.

For more information, see Using the CommPortal PBX Administrator UI on page 84.

## 5.1 Enabling Access to the PBX Administrator UI

Access to the PBX Administrator UI is disabled by default, and you must enable it for each of the CommPortal customizations that should provide this access using the branding process described in the *MetaSphere EAS Customization and Branding Guide*.

You can also use this branding process to control which of the CommPortal screens are displayed to your PBX users. For example, you may wish to hide the options that a PBX administrator cannot use but still show them for your regular subscribers.

You will also need to update your customizations following the procedure described in the *MetaSphere EAS Operational Procedures Guide* before your administrators can access this UI.

## 5.2 Using the CommPortal PBX Administrator UI

If you have enabled the CommPortal PBX Administrator UI, PBX administrators who log in using the Listed Directory Number (LDN) for the PBX can use CommPortal to view and change the configuration for the LDN line and the DID lines associated with the PBX.

### Viewing and Changing Configuration for the LDN

When the CommPortal PBX Administrator UI is enabled in a deployment, a PBX Administrator who logs in to CommPortal using the LDN for the PBX will see the subscriber Home page described in CommPortal Subscriber Home Page on page 18.

On this screen, the PBX Administrator can view and make any changes to the configuration of the LDN line. Your PBX Administrators will only be able to configure the services that you have enabled for the PBX, and there will typically be fewer services than are available to regular subscribers. The availability of these services is defined by the PBX's CFS / EAS configuration (particularly its CFS Persistent Profile and EAS Class of Service), or by specific CommPortal branding customizations. You can customize this CommPortal UI so that the administrator can only access the services whose configuration they can change.

The PBX Administrator will also see a **Direct Dialing** button in the **Your Services** panel on the CommPortal UI.
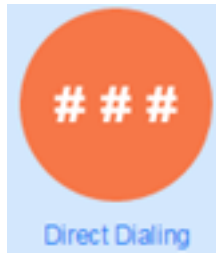


**Figure 60: Direct Dialing Button**

Clicking **Direct Dialing** launches the page described in Viewing and Configuring Direct Dialing (DID) Lines on page 85.

## Viewing and Configuring Direct Dialing (DID) Lines

PBX Administrators can use the Direct Dialing screen to view all the lines in the PBX and make changes to individual lines.



**Figure 61: PBX Direct Dialing screen**

Your administrators can carry out the following actions on DID lines.

- Use the **Lines in range:** drop-down list to select the range of DID numbers that they would like to view.

  The screen then displays the directory number and name of each DID line that falls within the specified DID range. This range can contain up to 1,000 lines.

- Use the **Search for** text box to enter text to match on the contents of any of the columns to find a particular DID line.

  Search matches are highlighted with a yellow background.

- Expand the **Actions** drop-down alongside a DID line and carry out various administrative tasks.

  - Select **View individual settings** to launch the standard CommPortal UI for that line to view and, if permitted, change the configuration of the DID's EAS and CFS services. The PBX Administrator cannot view a DID Line User's password or PIN, or listen to their voicemail.

  - Select **Reset line** to launch a pop-up where they can assign this DID line to another subscriber.

  - Select **Unlock account** to allow the DID subscriber to access their account, for example if they have entered an incorrect PIN or password multiple times and been locked out of their account.

# 6 Features for Easy Attendant and Premium Attendant Lines

> **Note:**
>
> For information about setting up Easy Attendant and Premium Attendant Lines on MetaSphere CFS, see the *Call Services* and *MetaSphere EAS Operational Procedures Manuals*.

**Easy Attendant** and **Premium Attendant** are both automatic call answering services that deliver an interactive menu to callers. They can act as an immediate answering service for the business, as an out-of-hours receptionist, or can simply answer the phone whenever no human operator is available.

* **Easy Attendant** offers a very simple automated TUI menu. Callers to a business are directed to the automated TUI, providing key options to transfer to specific departments or individuals in the business, to transfer to a voicemail account directly, or to listen to a recorded announcement.

  You can choose to have either a single menu that plays when Easy Attendant is turned on, or two different menus for business and non-business hours that are used according to a pre-defined schedule. When Easy Attendant is turned off, you can either forward callers to another telephone number or play a message informing the caller that your business is currently closed.

  The Easy Attendant UI is described in Overview of the Easy Attendant UI on page 88.

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

  The Premium Attendant UI is described in Overview of the Premium Attendant UI on page 94.

Once you have set up the Easy Attendant or Premium Attendant line on the telephony switch, and provisioned a subscriber for the line, the subscriber or Business Group administrator must then create the Easy Attendant or Premium Attendant menu using CommPortal. The CommPortal UI enables your subscribers to configure the schedules and menus to be used on the line, including making the necessary recordings for the announcements.

The CommPortal UI is accessed in one of the following ways:

* The subscriber can log on directly as the Easy Attendant or Premium Attendant line.
* If the deployment uses Business Groups, the subscriber can click through to CommPortal from the BG Admin interface, as described in Business Group and Department Lines on page 57.

> **Note:**
>
> Subscribers can also turn Easy Attendant and Premium Attendant on and off and record announcements using the self-care TUI, as described in the MetaSphere *EAS User Guide*. Note that if the call tree is being edited in a concurrent GUI or TUI session, it may not be possible to save a recording.

## 6.1 Overview of the Easy Attendant UI

The Easy Attendant subscriber will see the following screen when they log in to the CommPortal Easy Attendant UI for the first time, or if no configuration has yet been set up.

> **Note:**
>
> If you have enabled the CommPortal Initialization Wizard (as described in CommPortal Initialization Wizard on page 13) and the Easy Attendant subscriber's account has not yet been initialized, the subscriber will see this wizard before the Easy Attendant welcome message.
>
> Easy Attendant subscribers will only be required to update their PIN and password to complete the wizard. They will not need to record any greetings.

## Welcome to Easy Attendant

Easy Attendant answers your calls and plays an automated menu with options that you define. To start using the service please select from the following two options:

○ **Use a Schedule**
Different options during business hours and non-business hours.

○ **Use a Simple Menu**
Same options at all times.

Note: you can switch between these options later if your requirements change.

Continue...

**Figure 62: Easy Attendant welcome message**

This welcome message prompts the subscriber to select how they want to set up the Easy Attendant line.

- When **Use a Schedule** is selected, callers hear different options during business and non-business hours.
- Selecting **Use a simple menu** means callers are always offered the same options when the Easy Attendant service is turned on. As part of setting up Easy Attendant, the subscriber also configures what happens to calls when the service is turned off, either by specifying the number to which calls should be forwarded, or playing an announcement that informs callers that the number is unreachable.

It is possible to switch between schedule and simple menu mode once Easy Attendant has been set up, should requirements change.

- If the subscriber has already set up the Easy Attendant line in simple menu mode and now wishes to switch to using a schedule, they will be able to use the existing Easy Attendant menu as either their Business or Non-Business menu.

- If the subscriber switches from schedule mode to using the simple menu mode, they will be prompted to select one of their existing menus to use as the basis for the menu in simple menu mode, and will see a warning that the other menu will be deleted.

Selecting one of the radio buttons and clicking on **Continue** will bring up the Easy Attendant UI for that menu mode.

### 6.1.1 Easy Attendant Menu Tabs

Once a subscriber has completed the Easy Attendant initialization described in Overview of the Easy Attendant UI on page 88, they will see the **Main** menu for Easy Attendant.

This screen will indicate whether the Easy Attendant call tree is currently turned on or off, and, for schedule mode, which schedule is being used. In single menu mode, the screen will show the forwarding number to be used when the call tree is turned off.
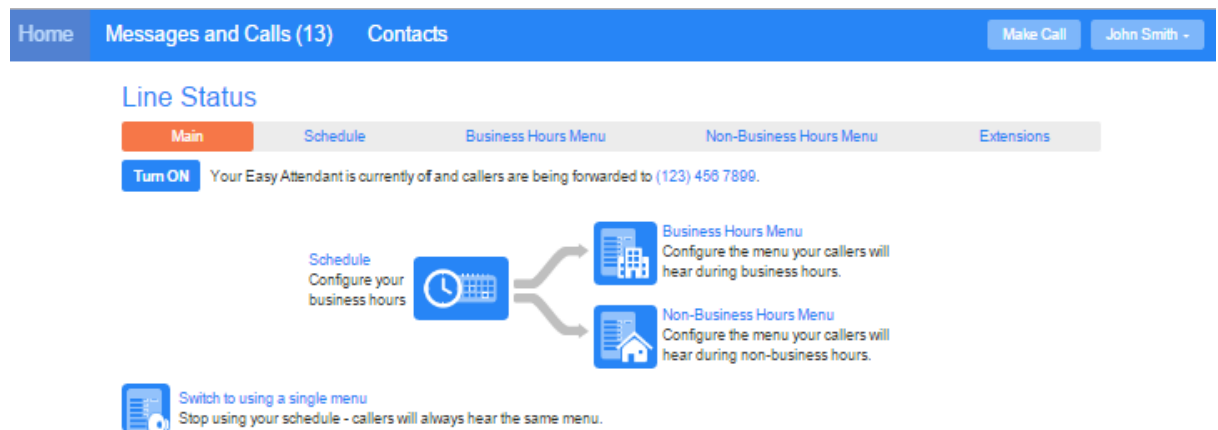


**Figure 63: Easy Attendant Main menu**

To set up their Easy Attendant in schedule mode, the subscriber should use the **Schedule** tab to set the business and non-business hours to determine when the different menus will be used. The subscriber can also configure **special days**, for example public holidays, when the non-business hours schedule will be used.

The subscriber will use the **Business Hours Menu** and **Non-Business Hours Menu** tabs (if they are using schedule mode) or the **Easy Attendant Menu** tab (if they are using the same menu at all times) to set up the Easy Attendant call tree menu(s).

It is a good idea to sketch out the operation of the menu on paper first to see exactly how the Easy Attendant should work before allocating actions to key presses and recording the announcements that will be used as the initial greeting and on key presses.

The subscriber clicks **record** or **listen/change** alongside keys that have announcements to launch the audio recorder pop-up where they can either record these announcements using a microphone on

their computer or upload a pre-recorded announcement. Existing announcements can subsequently be downloaded for re-use or back-up using this pop-up.
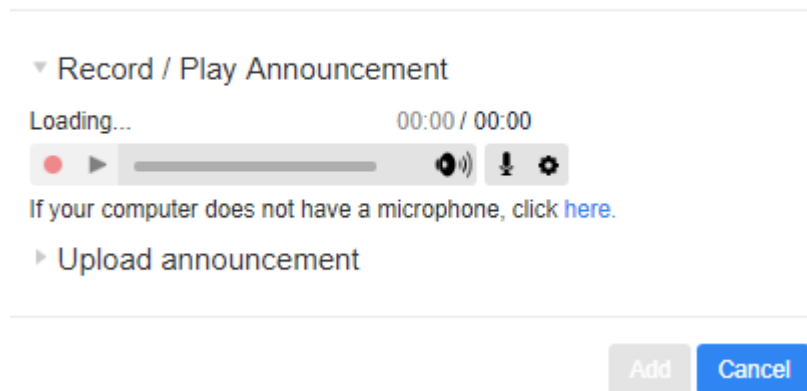


**Figure 64: Easy Attendant announcement recorder pop-up**

The subscriber can also dial in to the MetaSphere EAS TUI and record announcements. See the *MetaSphere EAS User Guide* for instructions on how to record announcements using the TUI.
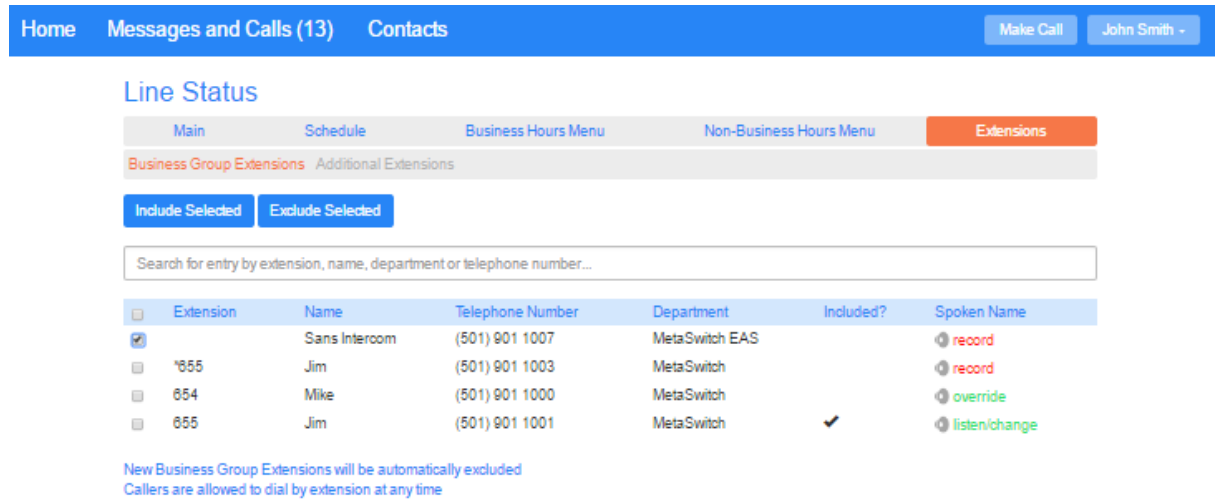
### Extensions tab

The **Extensions** tab will only appear if the Easy Attendant subscriber's Class of Service permits the **Dial by** menu options, where callers can enter an extension number to be transferred to, and is used to configure the extensions that should be included in the **Dial List** for the call tree.

The **Dial List** includes all the extensions that callers can enter when performing Dial-by-Extension, Voicemail-by-Extension, Dial-by-Name or Voicemail-by-Name actions within the call tree or, if you enable the feature, can dial using the Dial By Extension At Any Time option.

There is only one Dial List for each Attendant, and this is used for all **Dial-by-\*** and **Voicemail-by-\*** menu options within the Attendant (subject to the presence of name recordings for **\*-by-Name** as noted below).

Selecting the **Extensions** tab will bring up the following screen.

**Figure 65: Easy Attendant Extensions Menu**

The extensions that can be used in the Dial List will either be **Business Group Extensions** (if the Easy Attendant is a member of a Business Group) or **Additional Extensions**. On both of these tabs, extensions that are already included in the Dial List are shown in bold. These tabs are described in more detail below.

- Business Group Extensions on page 93
- Additional Extensions on page 93

**Dial by Extension At Any Time**

> **Note:**
>
> You can only enable this feature if the Easy Attendant subscriber's Class of Service permits dial by extension.

An Easy Attendant can be configured to allow callers to dial an extension number at any point in the Easy Attendant menu, rather than having to navigate to a Dial By Extension menu option.

> **Attention:**
>
> This feature is disabled by default. You should note that enabling this feature means the TUI will be slightly less responsive because there will be a delay of 800ms after a caller selects an option. You should also note that pressing several keys at once to navigate through multiple menus will no longer work. This delay also applies after dialling an extension. Pressing **#** to end the extension digits will not work.
>
> We do not recommend enabling this feature if you have any single digit extensions. If an extension matches a menu option, the menu option overrides the extension and therefore the feature will not work for any extensions that clash with menu options.

If the Easy Attendant subscriber's Class of Service permits dial by extension, you will see the link at the bottom of the **Extensions** screen which enables you to toggle between allowing Dial By Extension

At Any Time and only permitting this from a Dial By Extension menu option. The link shows the current setting and you can click on it to change it.

If you enable the option for a caller to dial an extension number at any point in the call tree menu, you should include this in the initial announcement which callers hear when entering the Easy Attendant menu.

This link appears on both the **Business Group Extensions** or **Additional Extensions** tabs and its state is kept consistent across both screens. You cannot choose to use a different setting for different types of extension.

### Spoken Name recordings

If the subscriber's Class of Service permits **Dial by Name** actions, the subscriber can use the links under the **Spoken Name** column to launch the recording interface, where they can record or upload a new spoken name recording for that extension, listen to or change an existing recording, or download a recording for re-use or backup.

A spoken name is required for Dial-by-Name and Mailbox-by-Name actions, so that it can be played to callers to confirm they have selected the right person. Even if an extension is in the Dial List (shown in bold), it can only be selected by Dial-by-Name if a spoken name recording is present.

The Spoken Name column displays one of the following links to indicate the current status of the spoken name recording:

- Extensions that have no spoken name recording have a red **record** link in the Spoken Name column. Click on this link to upload a spoken name recording, or record one though your computer.
- If you or any other Easy Attendant user in the Business Group has recorded or uploaded a spoken name for an extension, the Spoken Name column will have a green **listen/change** link. Once such a Business Group recording has been made, it will be used in preference to the subscriber's own Spoken Name recording even if they add one later. If you know they have their own name recording you can choose to use that instead. Click on the **listen/change** link and then delete the Business Group recording.
- If the subscriber has recorded their own spoken name, and no Business Group recording exists, their own name recording will be used. Extensions in this state have a green **override** in the Spoken Name column.

**Note:**

The lists of available extensions may include phone numbers that belong to additional devices configured for a subscriber on MetaSphere EAS, where an extension number has been configured for this device. However, you can only record or use spoken name recordings on a subscriber's primary number, so the speaker icon will be grayed out alongside these additional device numbers.

If the primary device is marked as included and is a non-dialable group mailbox with a number of the form 'number-X', e.g. 12345-1, then dial-by-name will transfer to any additional device which is also marked as included, and will play the primary's recorded spoken name. If the primary

is marked as excluded, then the subscriber is excluded from dial-by-name even if there is an additional number marked as included.

## Business Group Extensions

**Note:**

This tab will only be visible if the Easy Attendant line is a member of a Business Group.

The **Business Group Extensions** tab shows the members of the Dial List that are automatically included because they are in the same Business Group as the Easy Attendant. The tab will display up to 1000 extensions configured for the Business Group. In Business Groups with more than 1,000 lines, the Easy Attendant subscriber may need to configure a display filter, for example a Department name, to display the extensions they are interested in. There is no limit on the numbers of Business Group lines included in the Dial List - all lines in the Business Group are included by default.

The extensions include

- all dialable primary lines of subscribers in the MetaSphere EAS Business Group
- any additional numbers configured for a mailbox that have been allocated a Business Group extension
- all secondary group mailbox numbers which are non-dialable and cannot be assigned extensions but can be used for Dial by Name actions, providing the secondary mailbox has an additional number configured.

Subscribers cannot add Business Group Extensions using this tab: these are managed by the Business Group Administrator. However, subscribers can use the **New Business Group Extensions will be automatically excluded/included** option at the foot of the screen to opt to automatically include or exclude in their Dial List any new Business Group extensions that might be added by an administrator. Changes may take up to 15 minutes to be visible in the Easy Attendant UI after an extension is configured in the Business Group.

The subscriber should use the checkbox alongside each line to exclude any extensions that should not be available in the Dial List, for example to prevent callers being able to dial the extension number of the CEO. Any extension that is excluded will no longer be shown in bold.

If visible, the subscriber can use the link at the foot of the screen to configure whether the Easy Attendant permits Dial By Extension At Any Time or only allows Dial By Extension from a Dial By Extension menu option.

## Additional Extensions

The Easy Attendant subscriber should use the **Additional Extensions** tab to add any non-Business Group extensions that should be available in the Dial List for their call tree.

- If the Easy Attendant is not part of a Business Group, then the subscriber should use this tab to configure virtual extensions for use in their Dial List.

- If the Easy Attendant is in a Business Group, additional extensions may not be required because all the Business Group extensions are automatically included, but the subscriber may wish to use additional extensions to provide rapid access to numbers outside the Business Group, for example to allow callers to reach someone's cell phone.

The subscriber must ensure that Additional Extensions are configured correctly on this screen.

- There is a limit of 30 Additional Extensions in a Dial List for an Easy Attendant menu, and these must be different from any Business Group Extensions. The following icon is used to flag where the same extension number exists in both the Additional Extensions and Business Group Extensions tab to prompt the subscriber to resolve this clash. ⚠

- If the Easy Attendant has the Dial by Extension At Any Time option enabled, you must ensure that these additional extensions use the valid extension format of a string of 1-7 digits, which can be prefixed with a single * or # character. We recommend using extension numbers with more than a single digit to avoid potential conflicts with menu options: if an extension number matches a menu option, the dial by extension at any time feature will not work for that extension.

If visible, the subscriber can use the link at the foot of the screen to configure whether the Easy Attendant permits Dial By Extension At Any Time or only allows Dial By Extension from a Dial By Extension menu option.

### 6.1.2 Changing Easy Attendant Settings
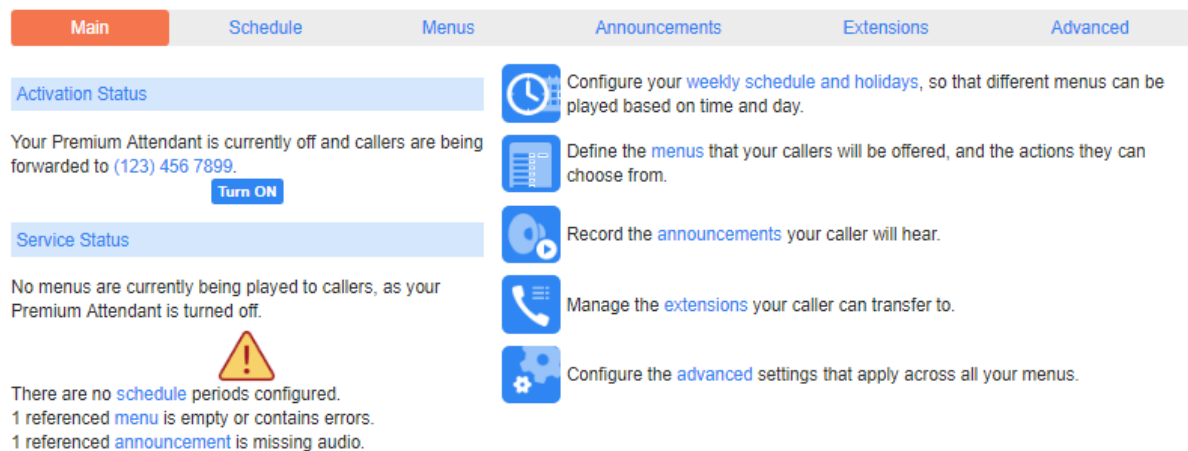
The CommPortal UI for an Easy Attendant subscriber is similar to that used by an Individual Line, but many of the settings there are not used by an Easy Attendant line and so will not be visible.

In most cases, the Easy Attendant subscriber will only use the CommPortal UI to change the password and/or PIN for accessing the Easy Attendant UI, as described in CommPortal Subscriber Home Page on page 18.

## 6.2 Overview of the Premium Attendant UI

The Premium Attendant subscriber will see the following screen when they log in to the CommPortal Premium Attendant UI.

**Figure 66: Premium Attendant Main Menu**

The **Main** tab provides the following information.

- The **Activation Status** panel indicates whether Premium Attendant is currently turned on or off and, if it is turned off, whether calls are being forwarded to another number.

  The subscriber can use the button to turn Premium Attendant on or off and click on the link to change the forwarding number or set Premium Attendant to play a recorded message instead.

- The **Service Status** panel shows which schedule and menu are currently in force and reports if there are any errors in the configuration of your schedules, menus or announcements.

- The panel on the right-hand side provides a suggested workflow for setting up Premium Attendant using the Schedule, Menus, Announcements, Extensions and Advanced tabs, all of which are described in Premium Attendant Tabs on page 95.

### 6.2.1 Premium Attendant tabs

The subscriber will use the Schedule, Menus, Announcements, Extensions and Advanced tabs to configure their Premium Attendant. It is a good idea for the subscriber to sketch out the operation of their Premium Attendant on paper first to see exactly how this should work before setting up their schedule and menus, allocating actions to key presses or recording announcements.

On first accessing each of the following tabs, the subscriber will see some introductory text explaining what they can set up using this tab.

#### Schedule tab

The **Schedule** tab allows your subscriber to configure a schedule with up to ten periods during which a different Premium Attendant menu can be played. Eight of these periods are user-defined, and two are pre-defined.

- On first use, the subscriber can choose whether to use an example schedule or a blank one as a basis for creating their first schedule.

- Each period within the schedule uses a different color so that the subscriber can easily see which period applies to which time.

- Two periods are already created
  - an 'out of hours' period that will play a menu during any times not specified in any of the other periods
  - a 'special days' period that will play a different menu on public holidays and other specified dates when your business is closed.
- Each period must be associated with a menu, and will display an error until the subscriber has set this up. Additionally, Premium Attendant can only be turned on if the menu associated with a period has a menu announcement. The menu announcement is the recording played to introduce the menu and describe the options available to the caller.

### Menus tab

The **Menus** tab allows your subscriber to configure the menus to be associated with the schedule periods that have been created. It offers the following options.

- The **General** tab allows the subscriber to add a new menu, or edit the name, description and menu announcement of an existing menu.
- The **Keys** tab allows the subscriber to define the action for keys 1-9, 0, #, and * for a selected menu. These key actions can be any of the following, some of which are only available if the subscriber's Class of Service permits.
  - Use Default (which is selected by default for all events for new menus)
  - Transfer to Phone
  - Transfer to Voicemail (CoS controlled)
  - Dial by Extension (CoS controlled, including whether an announcement is automatically played giving initial instructions when this key is pressed, or whether these instructions must be recorded by the subscriber in the menu announcement)
  - Dial by Name (CoS controlled)
  - Voicemail by Extension (CoS controlled)
  - Voicemail by Name (CoS controlled)
  - Transfer to Operator (CoS controlled, and only available for Premium Attendants in a Business Group)
  - Intercept mailbox (CoS controlled)
  - Selfcare by Extension (CoS controlled)
  - Go to Menu
  - Return to Previous Menu
  - Replay Menu
  - Announcement - Return
  - Announcement - Hang up
  - Hang up
- The **Timeout** tab allows the subscriber to override the default value for timeout on a selected menu and specify the action that Premium Attendant will take if the caller does not press a key within this time. The default values, that apply to all menus unless specified under this tab, are set using the

- The **Reference** tab allows the subscriber to see whether the selected menu is referenced by any other menu or schedule in Premium Attendant. The subscriber cannot delete a menu if it is referred to in another schedule, unless the Premium Attendant is not currently active.

### Announcements tab

The **Announcements** tab allows your subscribers to create the announcements that will be used in the Premium Attendant menus.

The subscriber uses the Announcement Recorder dialog to set up, review and modify their Premium Attendant announcements. Each announcement is given a name and description and the subscriber then uses the drop-down to choose whether to record/play the announcement, upload a pre-recorded announcement or use their phone to dial in to the Premium Attendant TUI to record announcements.

**Figure 67: Premium Attendant Announcement Recorder**

The subscriber can also download announcements that they have previously recorded or uploaded so that these can be re-used or backed up.

### Extensions tab

The **Extensions** tab will only be visible if your subscriber's Class of Service permits this type of call transfer. This tab allows the subscriber to

- manually configure up to 200 **Additional Extensions** for use in Premium Attendant menus
- select the **Business Group Extensions** that they want to include (if the Premium Attendant subscriber is a member of a Business Group.)

    The Premium Attendant subscriber can select any extension for use in their Premium Attendant menu Dial List. The **Business Group Extensions** tab will display up to 1,000 lines. In Business Groups with more than 1,000 lines, the Premium Attendant subscriber may need to configure a filter, for example a Department name, to display the extensions they are interested in. There is

no limit on the numbers of Business Group lines included in the Dial List - all lines in the Business Group are included by default.

If the subscriber's Class of Service permits dial-by or voicemail-by name transfers, the subscriber will also be prompted to record or upload a spoken name for each extension if the extension corresponds to a subscriber's primary number and one has not already been recorded. You should note, however, that the lists of available extensions may include phone numbers that belong to additional devices configured for a subscriber on MetaSphere EAS, where an extension number has been configured for that device. However, you cannot record or use spoken name recordings on these extensions.

The Premium Attendant Extensions tab is identical to the Easy Attendant Extensions tab, as described in Easy Attendant Menu Tabs on page 89.

### Advanced Tab

The **Advanced** tab allows your subscriber to change some of the default values in their Premium configuration.

- The **Default keys** tab allows the subscriber to change what a key should do if it is set to "Use default" on a menu. This can be one of the following actions:
  - Do Nothing
  - Transfer to Phone
  - Transfer to Voicemail (CoS controlled)
  - Transfer to Operator (CoS controlled)
  - Intercept mailbox (CoS controlled)
  - Dial by Extension (CoS controlled)
  - Return to Previous Menu
  - Replay Menu
- The **Error handling** tab allows the subscriber to configure the default behavior of Premium Attendant in the following scenarios. In each case, the subscriber can use drop-down menus to select the default behaviour and choose either how long the timeout should be or how many times a caller can attempt to carry out an invalid action before the default behaviour is used.
  - **Timeout**. A caller fails to press a key within the specified timeout.
  - **Unknown Input**. A caller presses a key that is not configured in the Premium Attendant menu for a specified number of times.
  - **Call Transfer**. A call transfer fails within the specified outdial timeout.
  - **Invalid Extension**. A caller selects an invalid extension for a specified number of times.
- The **Other Settings** tab is only visible if the subscriber has a Class of Service that permits one or both of these call transfer options. The tab allows the subscriber to
  - choose whether dial by name transfers are matched on first and last name, or first name, or last name
  - set the telephone number for the voice mailbox to be used on the 'Intercept mailbox' action.

## 6.2.2 Premium Attendant Settings Tab

The CommPortal UI for a Premium Attendant subscriber is similar to that used by an Individual Line, but many of the settings there are not used by a Premium Attendant line and so will not be visible.

In most cases, the Premium Attendant subscriber will only use the CommPortal UI to change the password and/or PIN for accessing the Premium Attendant UI, as described in CommPortal Subscriber Home Page on page 18.

# 7 SIP Phone Applications

**Phone Applications** are tools which run on a subscriber's SIP phone, using the phone's own display and keys, offering convenient access to some of CommPortal's most-used features.

CommPortal Phone Applications are supported on a range of SIP phones from a number of manufacturers including Cisco, Aastra and Polycom, with the set of applications available depending on the capabilities of the phone and the firmware version being used. Some SIP phone models support all of the CommPortal Phone Applications whereas some models only support the Subscriber Login / Logout of Phone applications described in Subscriber Login / Logout of Phone Applications on page 102. The full application set is not available for these phone models because of their limited screen size, or, in the case of some Aastra and Polycom models, because of firmware limitations.

The full range of phone applications is only available to Business Group subscribers. However, subscribers with individual lines where the phone is provisioned using an Endpoint Pack may be able to use the login phone application.

The *MetaView SIP Provisioning Server Guide* provides more information on how to deploy, manage and customize your SIP Phone Applications.

These Phone Applications are available by default in US English. You can also offer them in UK English, Canadian French and Latin American Spanish by carrying out some simple customization steps after installing your system. Further languages are also available by installing the relevant EAS language packs. Your subscribers will then use these applications in the same language as they view the CommPortal interface.

Phone Applications are not delivered by default, and Administrators or, for Business Group subscribers, a Business Group administrator, can control which business groups are able to use which application(s).

You can also customize the on-phone text shown by the Phone Applications using the procedures described in the *MetaView SIP Provisioning Server Guide*, for example you may wish to change some of the strings once you have applied the language you want.

> **Note:**
>
> Note that these applications do not appear on CommPortal itself - rather, they are presented on the phones themselves. The subscriber need not have access to CommPortal using a PC to use these phone applications.

## 7.1 Network Contacts Application

The Network Contacts Application allows subscribers to use their SIP phone to

- view their CommPortal contacts, and the list of extensions and line names in their business group

- search the lists, matching against contacts' names, nicknames, organizations, email addresses and telephone numbers

- sort by first name or last name

- view the detail of a specific contact, including their full name, title, organization, telephone numbers, postal addresses and email addresses

- call a contact, either on their preferred number or a specific number

- add a new contact, providing name, nickname, organization, number or number preference of a contact

- paste a number from call lists or voicemail into a contact's number field. Numbers can be pasted by pressing the **Contact** key that appears when viewing a number in an application, for example the voicemail or call lists applications) and choosing to add the number to an existing contact, or creating a new contact.

Subscribers cannot edit or delete Business Group contacts using the Network Contacts Application. The following actions can only be carried out on contacts added through CommPortal or phone applications:

- modify the name, nickname, organization, number or number preference of a contact

- delete a contact.

> **Note:**
>
> Any change that is made on the SIP phone is updated immediately in CommPortal and on next poll in CommPortal Assistant (or immediately if you use MetaView Director).

## 7.2 Network Call Lists Application

The Network Call Lists application allows subscribers to use their SIP phone to

- view combined or separate lists of missed/dialed/received/rejected calls, including who (was) called and when

- view more details, including the duration of the call

- jump from the identity of the sender to the corresponding contact in the contacts application (or create a new one if no such contact exists)

- return (or retry) a call.

## 7.3 Network Call Lists - Dialed Calls Application

This is functionally the same as the plain Network Call Lists application, but it starts on the Dialed List page of the subscriber's list of calls.

This application is intended for assignation to the phone's redial button so that the subscriber can see a list of recent dialed calls from which to choose to call. The subscriber can still navigate from that point to missed/received/rejected calls as with the Network Call Lists applications.

## 7.4 Message List Application

The Message List application allows subscribers to use their SIP phone to

- view a list of voicemails, including who sent them, when, whether they are urgent and whether they have been heard
- play voicemails
- read transcripts of their voicemails, if Speech-to-Text is available
- view more details, including the duration
- jump from the identity of the sender to the corresponding contact in the contacts application (or create a new one if no such contact exists)
- return the call
- mark voicemails as heard or unheard
- delete voicemails.

**Note:**

Any change that is made on the SIP phone using this application is updated immediately in CommPortal, and on next poll in CommPortal Assistant as well as in the TUI.

## 7.5 Services Application

This application provides a menu listing all the applications available to the subscriber on this SIP phone. Subscribers can then start the application by selecting it from the menu.

Note that if the Services application is deployed for a subscriber, the subscriber loses the ability to access on-phone details of the directory, call lists and voicemail services via the services menu. However these features are replaced by the other Phone applications available to subscribers using SIP phones.

## 7.6 Subscriber Login / Logout of Phone Applications

**Note:**

Subscriber Login/Logout of Phone Applications do not work over HTTP for Aastra SIP phones.

The Subscriber Login Phone Application may be supported for subscribers with individual lines where the phone is provisioned using an Endpoint Pack. You should refer to the documentation accompanying each Endpoint Pack for full information on what phone applications are supported.

Subscribers must log in to these applications using their directory number. Email login is not supported even if subscribers have enabled this for their CommPortal account.

These applications are different to the other Phone Applications as they are present on the phone before it is registered. These applications change the way a subscriber logs in to their phone, and changes the way the phones are registered with the SIP Provisioning Server.

These applications require the subscriber to enter their CommPortal password. CommPortal passwords must contain special characters. Due to firmware limitations, subscribers will not be able to enter any bracket characters ( ){ }[ ] when logging on to Aastra or Polycom phones. Subscribers should make sure that they can enter their CommPortal password using the phone keypad. If a subscriber's CommPortal password is too difficult to enter using the phone keypad, or it contains any unsupported characters, they will need to change it using the **Change password** option on their CommPortal Home page before they can log on to the SIP phone.

The following sections detail these applications in full.

### 7.6.1 Hot Desking

This feature allows a subscriber to log in to a phone not already associated with a subscriber - as long as it has been configured in the SIP Provisioning Server.

The subscriber is asked to enter their directory number, and CommPortal password. This associates the phone with their account, which then delivers the application set and features associated with their account.

Once the subscriber has finished using the phone they should log out. The Hot Desking feature consists of both Login and Logout applications.

### 7.6.2 Service Provisioning

This feature allows you to give your subscribers phones *without* needing to pre-configure them on the SIP Provisioning Server in advance. Instead, when the phone is connected and initiated, it asks the subscriber to log in using their directory number and CommPortal password.

This then triggers the configuration of their phone on the SIP Provisioning Server, which subsequently delivers the application and feature set associated with their account.

The Service Provisioning feature consists of a single login application; there is no logout feature.

### 7.6.3 Mixed Hot Desking and Service Provisioning behavior

You can mix these features to provide the login and configuration features you desire.

- Hot Desking only - In this mode, only those phones you have configured on the SIP Provisioning Server will accept login credentials; if a subscriber attempts to associate any other phone it will be rejected. This allows you to keep control over which phones your subscribers can use. In this mode, you should deploy both the Hot Desking Login and Logout applications.
- Service Provisioning only - In this mode, you can give your subscribers phones without pre-configuring them on SIP Phone Provisioning Server. When a subscriber logs in to a phone, that phone is then always associated with that subscriber. In this mode, you should deploy the Service Provisioning Login application only.

This means that it is not possible to re-use the phone for a different subscriber without using the Business Group Administrator's CommPortal Phone Configurator to de-register the phone.

- Hot Desking with Service Provisioning - In this mode, you gain the benefits of both features. You do not need to pre-configure phones on the SIP Provisioning Server and you can re-register phones without administrative interaction.

In this mode, you should deploy the Service Provisioning *Login* application and the Hot Desking *Logout* application. You *should not* deploy the Hot Desking *Login* application, as the Service Provisioning Login application provides the necessary functionality.

## 7.6.4 Feature availability

Note that, if you choose to use the Subscriber Login / Logout applications, you must make them available to all of your subscribers (who have SIP phones). However, you can combine Hot Desking and Service Provisioning in various ways. Your options are as follows.

- You can deploy Hot Desking (only) to all your subscribers.
- You can deploy Service Provisioning (only) to all your subscribers. However, you can still use Managed Devices provisioned through MetaView if you deploy Service Provisioning.
- You can deploy Service Provisioning (only) to some subscribers, and both Hot Desking and Service Provisioning to the remainder of your subscribers.

**Note:**

You *cannot* deploy Hot Desking (only) to some subscribers and Service Provisioning (only) to others. That is, if you choose to use Service Provisioning, all your subscribers will have access to that feature; some may additionally have access to Hot Desking.

# 8 Appendix: CommPortal Assistant

> **Note:**
>
> CommPortal Assistant is an advanced feature. It may be available only with certain types of account, or may require an additional fee. Consult your telephone company for further details.
>
> The instructions in this appendix are written from the subscriber's perspective. If you wish, you can use them as the basis for your own information for your subscribers. However, they are not designed for direct distribution to end-users.

**CommPortal Assistant** runs on your own PC, offering a convenient and fully-integrated route into your MetaSphere account. Using the toolbar you can carry out a number of tasks, all from your PC:

- enable a pop-up that appears when you receive an incoming call on the telephone number you used to log in to CommPortal - if you do not want to answer the call, you can use the pop-up to either decline the call or redirect it to another telephone number
- see when you receive new messages in your MetaSphere mailbox and, if you have the Speech-to-Text (STT) service, see when the transcript of a message is available
- search your contact lists and place calls to those contacts
- make instant changes to your call settings, for example to send calls to voicemail
- synchronize your CommPortal contacts with your Microsoft Outlook contacts
- place calls with one click from inside Microsoft Outlook.

Before you can make use of the features of CommPortal Assistant, you must first install it on your computer, as described in Installing CommPortal Assistant on page 105.

Configuring CommPortal Assistant Settings on page 111 describes various configuration tasks that you may need to perform to ensure that your CommPortal Assistant Settings are correct. However, your Service Provider may already have done this for you.

Once you have installed, and if necessary configured, CommPortal Assistant, Using CommPortal Assistant on page 117 summarizes the features available to you. To explore these features in more detail, refer to CommPortal Assistant's online help.

## 8.1 Installing CommPortal Assistant

You can download and install CommPortal Assistant from within MetaSphere's web-based tool, CommPortal.

### 8.1.1 System Requirements

The PC onto which you want to download CommPortal Assistant must have at least 8MB of disk space for installation and be running

- Windows XP (Service Pack 2 or later), Windows Vista, Windows 7, Windows 8 or later

- Note that CommPortal Assistant is not supported on Windows 2000

- Internet Explorer 11.0 or above, or Firefox 3.0 or above.

    - If you are still using the default CommPortal UI available prior to V9.3.20, this is supported on Internet Explorer 8 and above.

CommPortal Assistant also requires `.NET 3.5`, a component of the Windows operating system. Most PCs already have `.NET 3.5`, although it is disabled by default if you are using Windows 8 or later. If you do not have `.NET 3.5` installed on your computer, the installation process will provide you with a link to download it from Microsoft and install it on your PC. This download is free.

You also need administrator privileges to install CommPortal Assistant. You will usually have these privileges if you are installing the software on your own computer, but you may need to contact your network administrators if you are using a company-owned PC or are in a similarly controlled environment.

## 8.1.2 Downloading CommPortal Assistant

- Log into your account using CommPortal.
    - Your service provider will have given you the URL (web address) for logging into your account.
    - Log in using your telephone number, and your PIN or password (whichever you normally use to access CommPortal).
- Click the **Downloads** link on the CommPortal home page to launch the **Apps** screen.
- If you have the option to choose between apps on different platforms, click on **On your Computer**; otherwise, skip this step.
- You are then taken to the list of apps available for your personal computer. Normally, the CommPortal Assistant page is displayed by default and you can download the application from this page. If the CommPortal Assistant page is not displayed by default, you can select it from under **Computer** on the menu on the left of the screen.
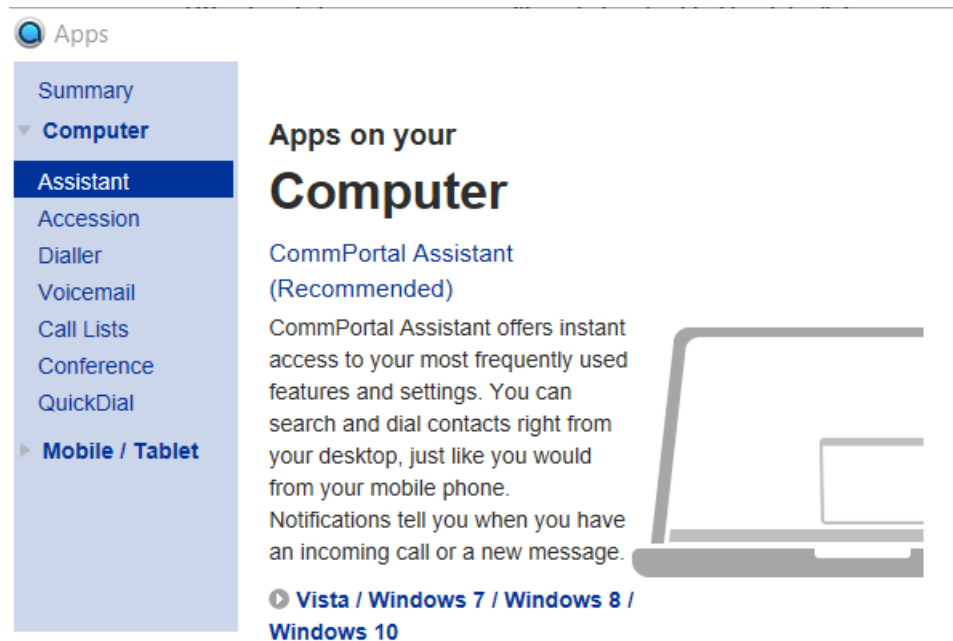
**Figure 68: The CommPortal Assistant Download Page**

- Click the link to download the installation package `ToolbarInstaller.exe`. You will see a pop-up dialog box similar to that illustrated in Figure 69: Security Warning on Download of CommPortal Assistant on page 107.
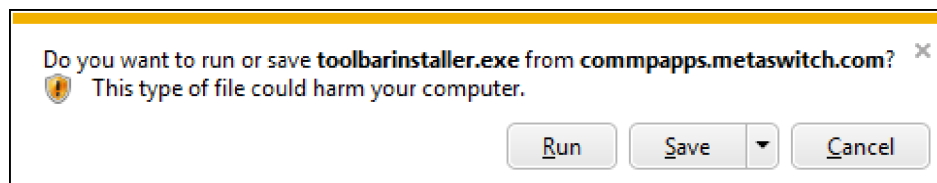


**Figure 69: Security Warning on Download of CommPortal Assistant**

- Click **Run** to install CommPortal Assistant immediately, or **Save** to download it and install it at a later date.

## 8.1.3 CommPortal Assistant Installation Wizard

Once you have downloaded CommPortal Assistant, you can use the CommPortal Assistant Setup Wizard to install the toolbar on your computer.
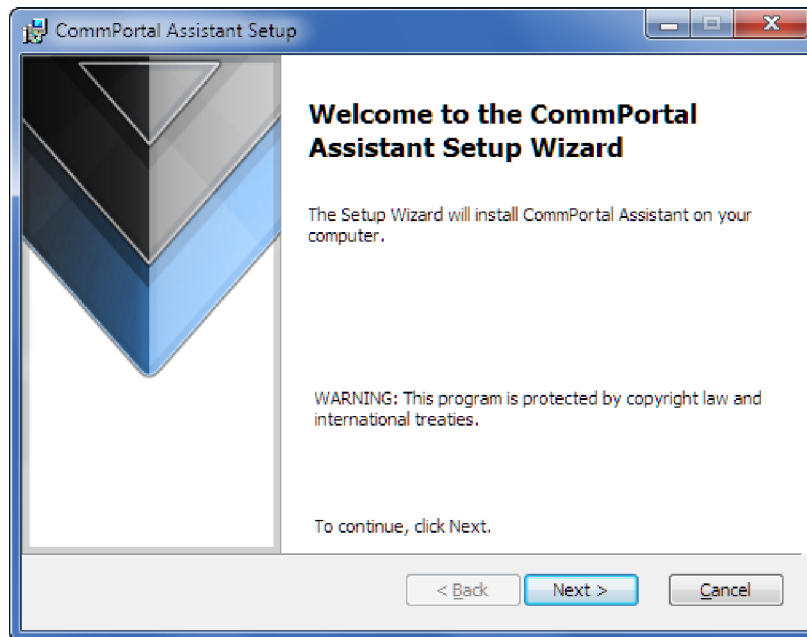
**Figure 70: The CommPortal Assistant Installation Wizard**

- If you chose **Run** when prompted by the dialog box in Downloading CommPortal Assistant on page 106, the installer will launch automatically. If you chose **Save**, when you are ready to begin installing CommPortal Assistant, open the location you saved it to and double-click the **ToolbarInstaller** icon.

- You may see a security dialog, asking you to confirm that you wish to install the new software. Confirm that you wish to proceed.

- The CommPortal Assistant Setup Wizard then begins.

- Click **Next**, then read the End User License Agreement. If you accept it, select **I accept the terms in the License Agreement** and click **Next** again.

- If your computer supports multiple users, you must then select whether you want to make the tool available to all users, or only to you. This choice is illustrated in Figure 71: Selecting the users on the computer for whom CommPortal Assistant is available on page 109.

  Even if you choose to make the tool available to all users, your MetaSphere account remains secure. Each user must enter their own login details to access their mailbox on MetaSphere.
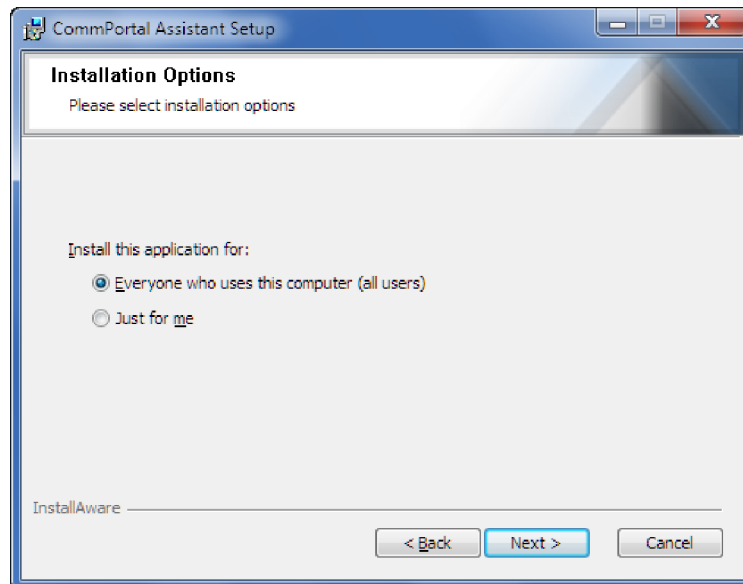
**Figure 71: Selecting the users on the computer for whom CommPortal Assistant is available**

- You are then asked whether you want to install the complete package or a custom package, as shown in Figure 72: Selecting a Complete Setup on page 109.
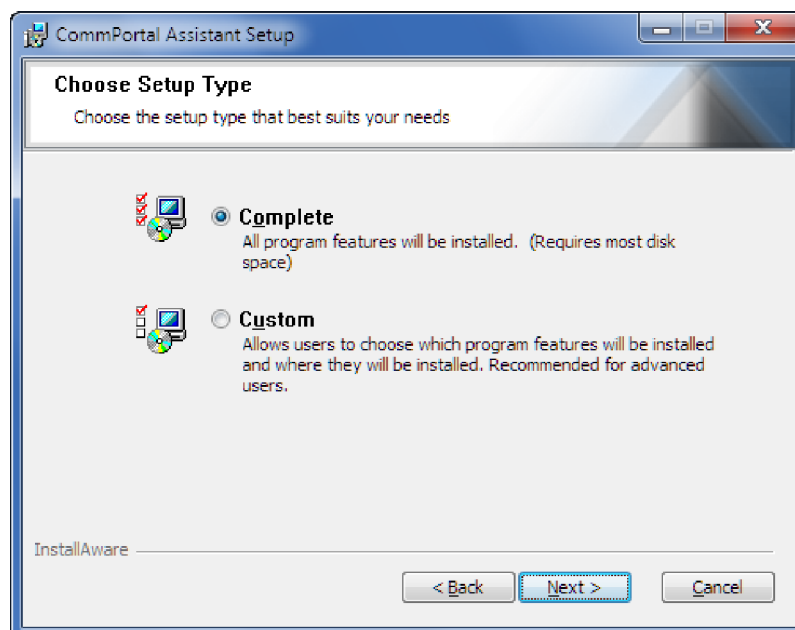


**Figure 72: Selecting a Complete Setup**

- If you are an experienced user, you may wish to select custom options. Otherwise, we suggest you install the complete package. Select **Complete** and then click the **Next** button.

- Finally, you are asked to confirm your settings, as shown in Figure 73: Initiating the installation on page 110. Select **Install** to continue.
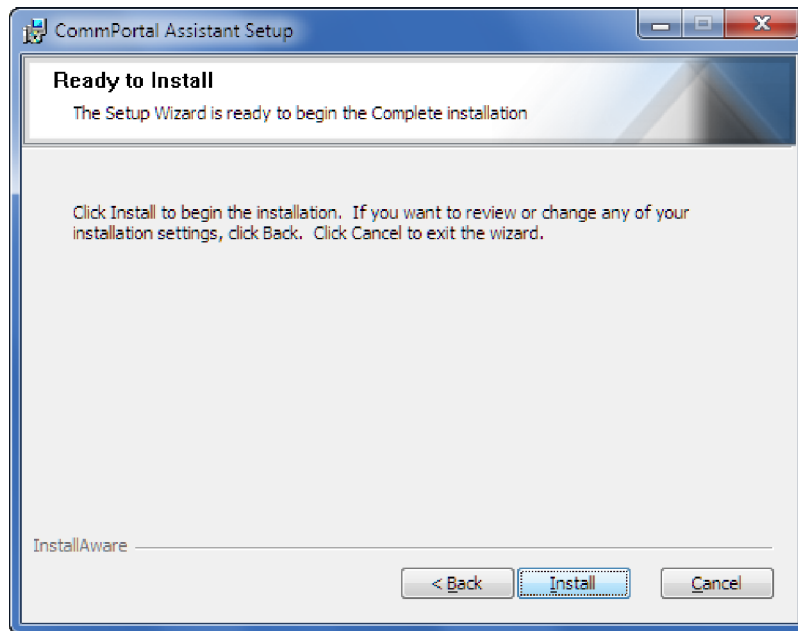
**Figure 73: Initiating the installation**

- CommPortal Assistant is then installed on your PC using the settings you configured.

- Once complete, click **Finish,** as shown in Figure 74: Installation Complete on page 110, to exit the Setup Wizard and start using the feature immediately.
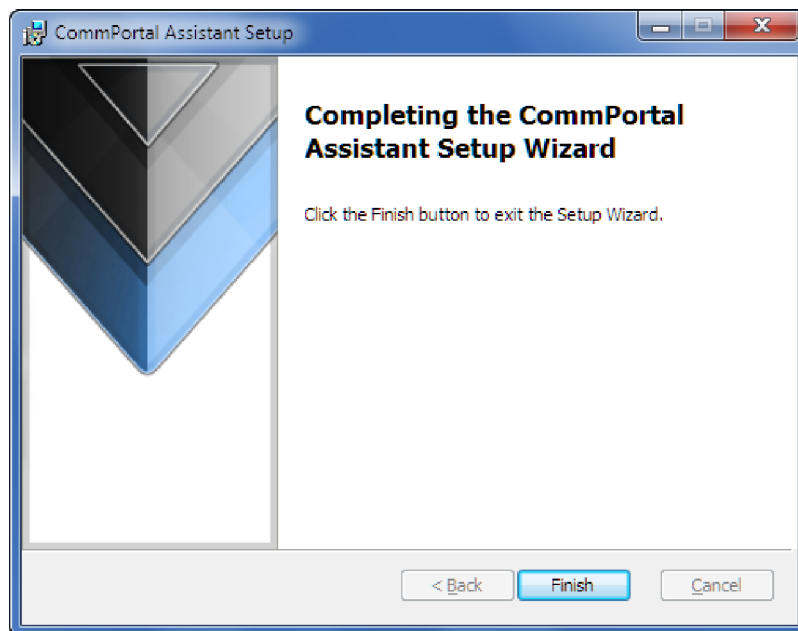
**Figure 74: Installation Complete**

> **Note:**
>
> If you have Microsoft Outlook 2003 or later installed on the same computer as CommPortal Assistant, the first time you launch the toolbar you will see a balloon message alerting you to CommPortal Assistant's synchronization feature described in Synchronizing CommPortal and Outlook Contact Lists on page 122. This feature enables you to automatically synchronize your

CommPortal Assistant and Outlook contacts once you have set up the necessary configuration, as described in Outlook Contacts Sync tab on page 115.

- Finally, verify that CommPortal Assistant appears in your Windows Taskbar and Notification area (usually towards the bottom-right of your screen), as illustrated below.



**Figure 75: The CommPortal Assistant and Notification area icons on the Taskbar**

- If CommPortal Assistant is not visible, right-click on your Windows Taskbar, select **Toolbars**, and then click **CommPortalAssistant**.

This completes the installation process for CommPortal Assistant.

### 8.1.4 Switching Between Versions in Microsoft Office 2010 or Microsoft Office 2013

**Note:**

This section only applies if you are using Microsoft Office 2010 or Microsoft Office 2013.

Microsoft Office 2010 and Microsoft Office 2013 both have 32-bit and 64-bit versions. When CommPortal Assistant is launched, it detects which version of Office is running and whether that has changed since it was last started.

If it detects a change in the Office version (including it having been added to, or removed from, the system) then you will need to restart CommPortal Assistant. This ensures that CommPortal Assistant is using the same bit version as Microsoft Office.

## 8.2 Configuring CommPortal Assistant Settings

If you want to alter your CommPortal Assistant settings, for example to display a pop-up when a message transcript is ready, you will have to configure your settings manually as follows:

- Right-click on the CommPortal Assistant notification icon.
- Select **Configure** to launch the **Settings** menu**.**

The dialog box shown in General Tab on page 111 appears.

The **Settings** dialog boxes display the details that CommPortal Assistant uses to access your account. The **General,External Contacts andOutlook ContactsSync** tabs are each described below.

### 8.2.1 General Tab

The General tab allows you to view and make changes to some of your general CommPortal settings.
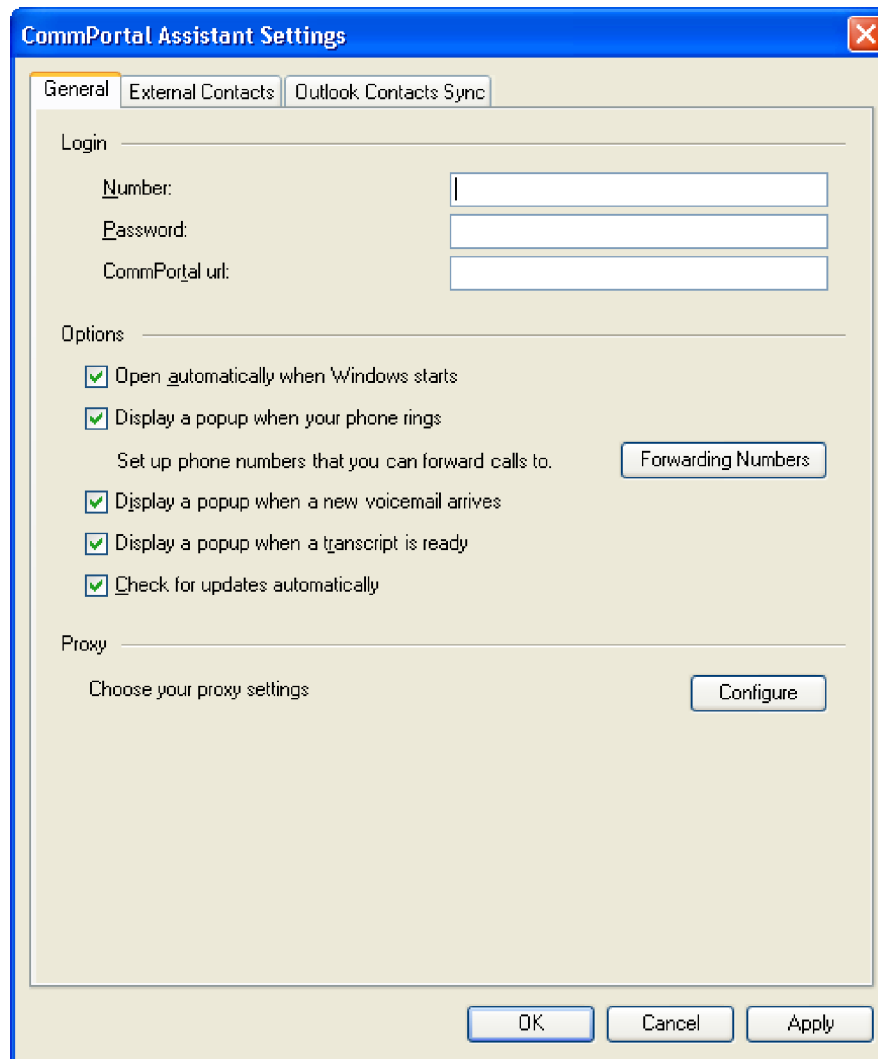
**Figure 76: CommPortal Assistant Settings Menu**

This screen is split into a number of sections.

The **Login** section contains the following fields.

- **Number** - this is the phone number you use to access your CommPortal account.

- **Password** - this is the password used to access your CommPortal account. Depending on your service provider, this may be the same as your PIN, or may be a separate password you use only for CommPortal.

- **CommPortal url** - this is the web address used to access your CommPortal account. This may be hidden if your Service Provider provides this by default.

The **Options** section allows you to alter the behavior of CommPortal Assistant.

- **Open automatically when Windows starts** - check this if you want the toolbar to open each time you turn on your computer.

- **Display a pop-up when your phone rings** - check this if you want an on-screen dialog box to pop-up each time your phone rings.

*If you have more than one phone number associated with your account, you will only see a pop-up when you receive an incoming call if you have logged in to CommPortal Assistant using your main phone number: you will not see incoming call pop-ups if you logged in to one of your additional lines.*

- You can use the **Forwarding Numbers** button to open up a new window that allows you to configure up to 5 phone numbers that you want to forward calls to. This window is described below under Forwarding Numbers on page 113.

- **Display a pop-up when a new voicemail arrives** - check this if you want an on-screen dialog box to pop up each time a new voicemail is delivered to your account. This pop-up will display details of the caller leaving the voicemail message, and the date and time the message was left.

- **Display a pop-up when a transcript is ready** - check this if you want an on-screen dialog box to pop-up each time a new voicemail transcript arrives in your account. This pop-up will display details of the message, as for voicemail messages, but will also either show the first line of the transcript or an error message explaining either that the transcription failed or that the message was too short for transcription.

  *You will only see this checkbox if you have the Speech-to-Text (STT) service. If you check both this box and the one above for voicemail notifications, you will get two pop-ups each time a new message arrives: firstly, when the message itself is left and secondly when the transcript of the message is delivered.*

- **Check for updates automatically** - check this if you want CommPortal Assistant to find out and tell you if there are updates available.

The **Proxy** section contains information used to access your account. Your service provider will tell you if you need to make any changes. You can access and change your proxy settings by pressing the **Configure** button.

Once you have completed all these fields, you should either select one of the other two tabs - for example if you want to enable Outlook Contact Synchronization as described in Outlook Contacts Sync tab on page 115 - or click **OK** to save your changes and close the Settings tab.

## 8.2.2 Forwarding Numbers

Clicking on the **Forwarding Numbers** button on the **Settings** page launches the screen shown in Figure 77: Call Forwarding on page 114.

**Figure 77: Call Forwarding**

This screen allows you to configure up to 5 numbers to forward incoming calls to. When you receive an incoming call, the pop-up alerting you to the call will include all the numbers that you enter here and allow you to forward the call with a single click.

- You may enter up to 32 characters in the **Name** field, or leave the field blank.
- You may enter any common number punctuation in the **Number** field including * and # to allow you to use Business Group short and intercom codes. The numbers can be in any form that would be valid to dial from the telephone, for example national numbers, local numbers, or extension codes.
  - You cannot leave this field blank if you enter a value in the Name field.
- **Delete all** empties all the text fields.

Once you have entered all the information, press **OK** to save it and close the window and return to the **Settings** tab. You will see an error message if you have completed any of the fields incorrectly.

## 8.2.3 External Contacts tab

The External Contacts tab allows you to change from using your Active Directory to use a different directory for your external contacts.
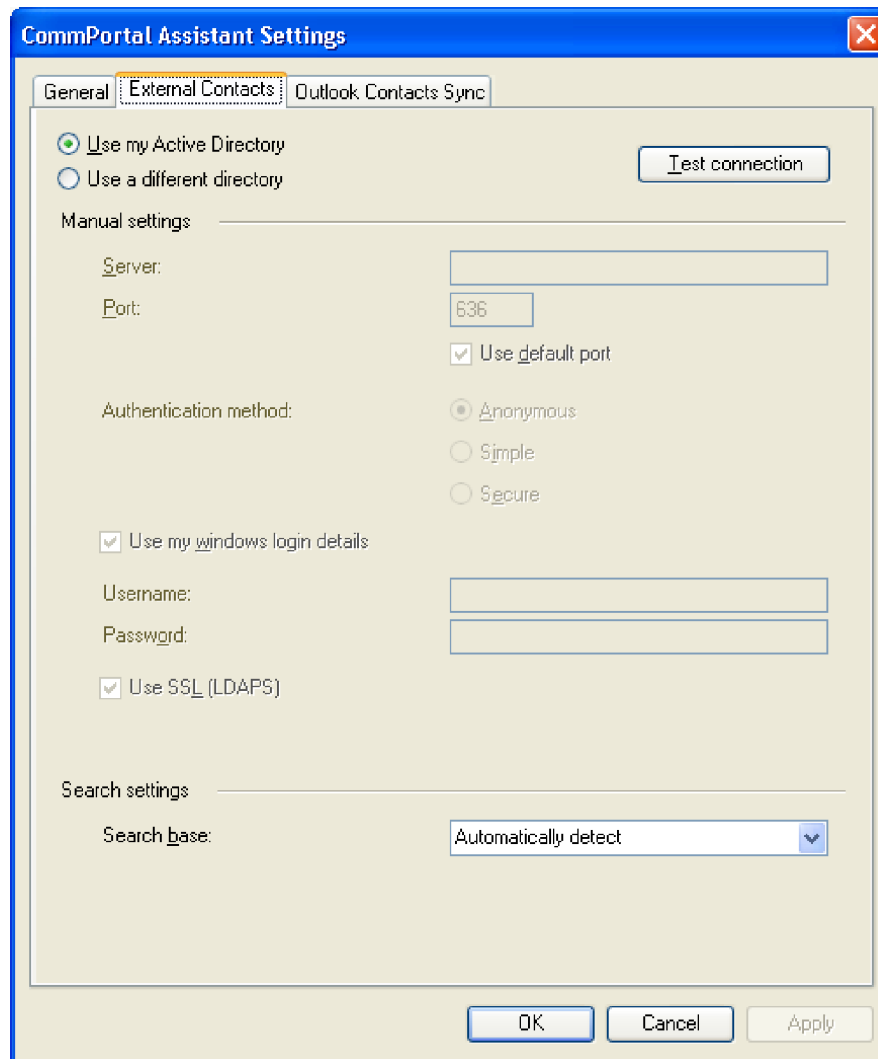
**Figure 78: External Contacts Tab**

By default, CommPortal Assistant uses your Active Directory.

If you need to change this to use a different directory, select the radio button alongside **Use a different directory**. You will now be able to make any necessary changes to the fields under **Manual Settings.** Contact your Service Provider for more information about the values you should be entering here.

You can use the **Test connection** button to check that CommPortal Assistant can access the directory you have selected.

## 8.2.4 Outlook Contacts Sync Tab

If you have Microsoft Outlook 2003 or later installed on the same machine as CommPortal Assistant, and have configured at least one profile within Outlook, you will also see the **Outlook Contacts Sync** tab illustrated in Figure 79: Outlook Contacts Sync tab on page 116. This enables you to configure the options for synchronizing any changes made to your Contacts in either Outlook or CommPortal.
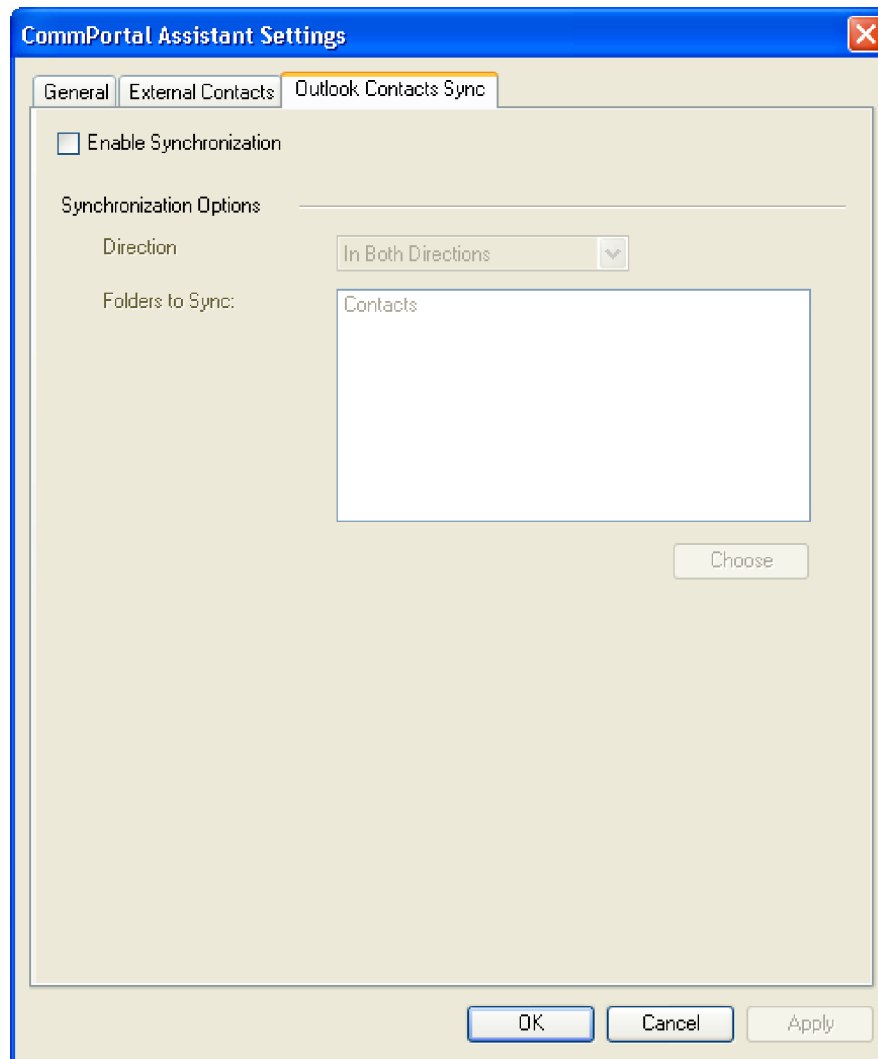
**Figure 79: Outlook Contacts Sync Tab**

This tab has the following options:

- **Enable Synchronization** - this will be disabled by default on installation or upgrade of CommPortal Assistant, and all the other settings will be grayed out. You should check this box to enable synchronization and make the other settings on the tab editable.

- **Select Profile** - if you have configured multiple profiles within Outlook and have not set a default profile, the dropdown box will display an alphabetically sorted list of all profiles. You must select a profile before synchronization can occur, and you will see a validation error if you attempt to submit the page without selecting a profile.

  If you have only one profile or have configured a default profile, this option will not be shown.

- **Direction** - this allows you to specify the direction in which you want the synchronization to occur. The options are **Both directions, From Outlook only,** and **To Outlook only**. The default option is **Both directions**.

- **Folders to Sync** - this indicates which Outlook folders will be included in the synchronization. The default is **Contacts**. Note that you cannot deselect this Contacts folder.

You can use the **Choose** button to display a tree-view list of possible folders within your Outlook mail store, each with an associated checkbox to indicate whether this folder should be included in the synchronization.

> **Note:**
>
> If you change your Outlook profile using the **Select Profile** button described above, the Folder list is reset to include just the default Contacts folder. You cannot use the **Choose** button if you have not selected a Profile.

Once you have completed the configuration, select **OK** to submit your changes.

- If you have enabled synchronization, you will then be prompted to either synchronize immediately, or disable synchronization.
- If you choose to synchronize immediately, synchronization will start, as described in Synchronizing CommPortal and Outlook Contact Lists on page 122.
- CommPortal Assistant will then perform a contact sync every hour to pick up any changes. You do not need to have Outlook open for this to happen.

# 8.3 Using CommPortal Assistant

CommPortal Assistant includes the following components to help you manage your account from your computer desktop.

- **Incoming Call Pop-up** - allowing you to see details of incoming calls as they arrive and optionally decline the call or redirect it to another number.
- The **Notification Icon** - found in the notification area (usually at the bottom right of your screen next to the clock).
- The **toolbar** - embedded in the Windows taskbar (usually at the bottom of your screen).
- **Outlook Integration** - allowing you to make calls from within Microsoft Outlook.

These components are described in more detail below.

## 8.3.1 Incoming Call Pop-up

> **Note:**
>
> CommPortal Assistant requires IE 11 when used with the new default CommPortal UI available from MetaSphere EAS V9.3.20.

As described in General Tab on page 111, you can configure CommPortal Assistant to display a pop-up each time you receive an incoming call on the telephone number you used to log in, as illustrated below.

**Figure 80: Incoming Call Pop-up**

This pop-up

- displays the number of the caller, or shows `Unknown number` if this has been withheld by the caller
- displays the name of the caller, instead of the number of the caller, if this can be determined
- allows you to decline the call by pressing
    - **Send to Voicemail**, if you have the Voicemail service
    - **Decline call**, if you do not have the Voicemail service, when the caller will then hear a message that you are unable to answer the call
- allows you to forward the call to one of the pre-configured telephone numbers shown on the pop-up:
    - if you have not yet configured any call forwarding numbers, you will see a link to the page where you can configure these
- indicates whether this is a Live Message Screening call.

> **Note:**
>
> If you use Live Message Screening, as described in the MetaSphere *EAS User Guide*, you will see a pop-up for both stages of the LMS call - first for the original incoming call, and then for the subsequent LMS service call. You cannot use Call Forwarding on LMS calls.

## 8.3.2 The Notification Icon

The Notification Icon indicates

- whether you have unheard messages
- that you have unresolved conflicts between your Contacts Lists in CommPortal and Outlook
- whether or not you are connected to your account.

You can access CommPortal directly from the Notification Icon, without needing to visit a login screen.

- The Notification Icon shows the following possible conditions.
    -  - when you have unheard voicemails
    -  - when you are connected to your account, but you have no unheard voicemails
    -  - when there is an error connecting to your account

- ⬠ - when there are unresolved conflicts between your CommPortal Contact Lists and your Outlook contacts following synchronization.

- Double-clicking the Notification Icon opens CommPortal on the Dashboard display.

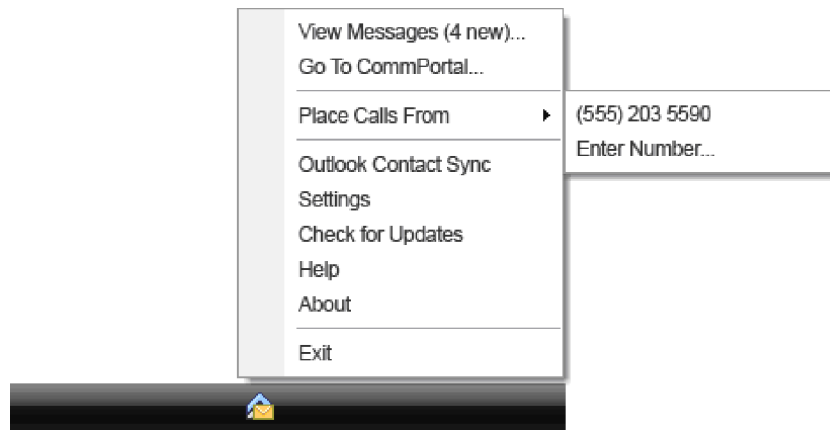- Right-clicking the Notification Icon brings up the following menu.



**Figure 81: Right-click menu of the Notification Icon**

You can choose from the following options.

- **View Messages** - opens CommPortal at the Messages display. This option also indicates the number of new messages in your account.

- **Go To CommPortal** - opens CommPortal at the Dashboard display.

- **Place Calls From -** allows you to choose the number to use when making a call. Hovering over this option presents a second dialog where you can either select a pre-configured number or enter a new one.

- **Outlook Contact Sync** - takes you to the **Outlook Contact Sync** tab described in Outlook Contacts Sync tab on page 115 where you can enable synchronization between your Contact Lists in CommPortal and Outlook.

  You will not see this option if you have already enabled synchronization between your CommPortal and Outlook Contact lists.

  If you have already synchronized your Contacts and you have unresolved conflicts between entries in your Contact Lists, you will instead see the option **Resolve Contact Synchronization Conflicts.** Synchronizing CommPortal and Outlook Contact Lists on page 122 describes how to resolve any conflicts.

- **Configure Settings** - opens the CommPortal Assistant **Settings** page where you can make changes to the behavior of CommPortal Assistant. For a full description, see Configuring CommPortal Assistant Settings on page 111.

- **Check for updates** - looks for software updates.

- **Help** - opens the online help in your default web browser.

- **About** - gives details about CommPortal Assistant, and includes buttons to generate diagnostics. For a full description, see the online help.

- **Exit** - closes CommPortal Assistant (which closes both the Notification Icon and the Toolbar).

## 8.3.3 The CommPortal Assistant Toolbar

**Note:**

If the CommPortal Assistant toolbar does not appear despite installing CommPortal Assistant, right-click on your Windows Taskbar, select **Toolbars**, and then click **CommPortal Assistant**.

The CommPortal Assistant toolbar allows you to control your status and to initiate outgoing calls.

The icon to the right of the toolbar displays your current phone status. Hover over the icon for more information. To change your status, right-click on the status icon to select from the options presented.

For example, if you have the default set of available settings, the icons, and the corresponding menu options, are as follows.

- ![icon] - **Ring My Phone** - your phone will ring as normal.

- ![icon] - **Do Not Disturb** - all calls will go to your voicemail and your phone will not ring.

- ![icon] - **Forward All Calls** - will forward calls either to voicemail or to another number you can select or specify, rather than making your phone ring.

- ![icon] - **Sim Ring** - will redirect calls to multiple numbers that you can specify; all the numbers will ring simultaneously and you can answer the call from any of the ringing devices.

**Note:**

If you also subscribe to the Incoming Call Manager, Easy Call Manager or FMFM services, you will see more icons and have a greater range of options to select from. See online help for full details.

The following screenshot shows the call services settings for a subscriber with Easy Call Manager, but who has not configured any Sim Ring numbers.
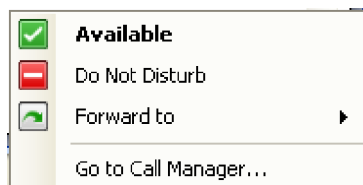


**Figure 82: Setting Your Call Services**

### Making Calls from CommPortal Assistant

You can also use the toolbar to make an outgoing call. To start a call, begin typing the name or number of the person you wish to call in the text entry box inside the toolbar. As you type, the toolbar will automatically offer suggestions from your contact list, as shown in Figure 83: Finding a contact to call on page 121.
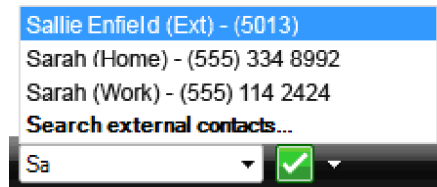
**Figure 83: Finding a contact to call**

If you are a member of a Business Group, these suggestions will include the names of any Business Group Line contacts as well as your personal contacts.

You can also enter a telephone number in the text entry box, whether that number is in your contact list or not. You should either enter the telephone number of the person you want to call (including the area code) or, if you are a member of a Business Group, you can enter an extension number.

- Click on the name or number of a contact to initiate a call to this contact, or press Return once you have entered a phone number.

- Your own phone will then ring. When you pick it up, MetaSphere places the call to the chosen contact. You will hear a ringing tone (or other tone) as though you had dialed the number yourself.

- You will see a pop-up that displays the status of the call for the first 15 seconds (unless your Service Provider has configured a longer timeout period), and allows you to end the call at the press of a button. Once the pop-up disappears, you can end the call by hanging up the phone.

**Note:**

Some models of phone, designed for use with a headset or speaker, support "auto-answer". If you are using one of these phones, you do not need to pick up your own phone. Through your headset or speaker, you will immediately hear the system placing your call to your chosen contact.

## 8.3.4 Making Calls from Outlook

If you use Microsoft Outlook, after you have installed CommPortal Assistant, you will find a new button on each **Contacts** page in Outlook.

To place a call to the contact, click the button. The following dialog opens, and you will need to enter relevant details in each field. You can either enter the name of a contact or the number directly. If you enter the number directly, you should either enter the telephone number of the person you want to call (including the area code) or, if you are a member of a Business Group, you can enter an extension number.
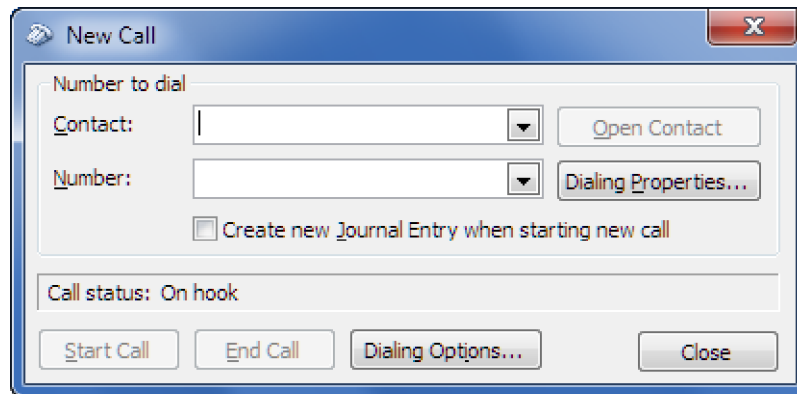
To make the call click **Start Call**.

**Figure 84: Outlook Call Contact Page**

See the CommPortal Assistant online help for full details of this feature.

## 8.3.5 Synchronizing CommPortal and Outlook Contact Lists

If you use Outlook 2003 or later on the same PC as CommPortal Assistant, you can configure CommPortal Assistant to synchronize your Contact lists - so that a change made in one application is applied to the other. Refer to Outlook Contacts Sync tab on page 115 for instructions on how to enable this synchronization.

Once it is enabled, synchronization takes place automatically in the background. When this synchronization is happening, you will see the screen shown in Figure 85: Synchronization Progress Window on page 122 describing the progress of the synchronization operation.
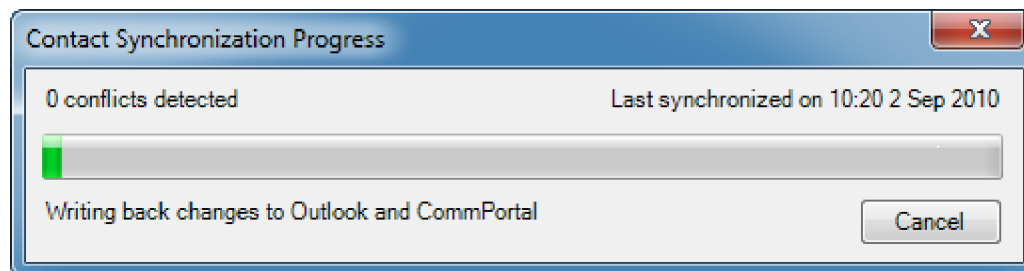


**Figure 85: Synchronization Progress Window**

- This window shows the progress of the synchronization process, including the number of conflicts detected.
- Selecting **Cancel** will abort the current synchronization. Changes made up to the point at which **Cancel** was clicked will still be applied.
- You can use the minimize button to close the dialog and allow the synchronization to continue in the background.
- Once synchronization is complete, the window will either close automatically or, if there are errors, remain open and indicate what the problem is.
- If there are any synchronization conflicts, the window shown in Figure 86: Conflict Resolution Window on page 123 below will open automatically as soon as synchronization completes.

### Resolving Synchronization Conflicts

A synchronization conflict occurs if you have made changes to both the CommPortal contact list and your Outlook contacts since the last synchronization that conflict with each other.

If there are conflicts, you will see an exclamation mark next to the notification icon (usually at the bottom-right of your screen next to the clock). You can then select **Resolve Contact Synchronization conflicts** to open the Conflict Resolution Window.

You may also see a balloon appear next to the icon when an automatic synchronization completes. You can click on this balloon to open the Conflict Resolution Window.

The Conflict Resolution Window, shown in Figure 86: Conflict Resolution Window on page 123, displays details of a single conflict. Once you have resolved this conflict, the window automatically changes to display the next conflicting contact until all have been resolved.
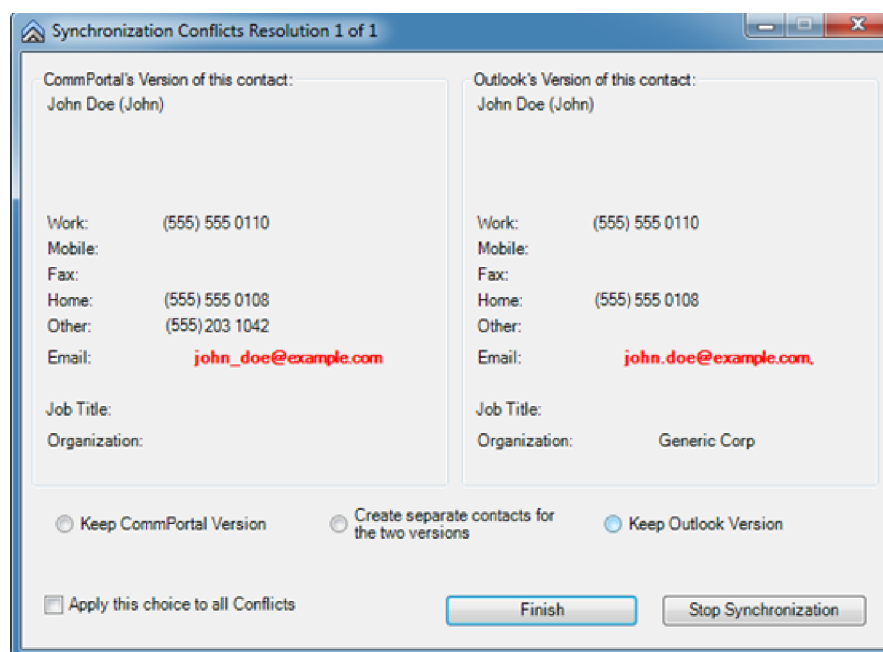


**Figure 86: Conflict Resolution Window**

- The dialog title indicates how many conflicts require resolution.
- The CommPortal and Outlook Contact List entries are displayed side-by-side, with the conflicting fields clearly indicated. In the example above, there is a small difference in the two email addresses.
- You can select one of the following buttons to resolve the conflict. This option will then become the default option for subsequent conflicts, even if the next conflict occurs during a later synchronization.
  - **Keep CommPortal Version -** the Outlook field is updated with the information in the CommPortal field.
  - **Create separate contacts for the two versions** - the conflict is unresolved.
  - **Keep Outlook Version -** the CommPortal field is updated with the information in the Outlook field.

- You can also apply this option to all the conflicts in your lists by checking the radio button alongside **Apply this choice to all conflicts**. This will resolve all outstanding conflicts in the same manner.

- Select **Continue** to apply any changes and move on to the next conflict, or **Stop Synchronization** to leave this and any subsequent conflicts unresolved.

When you run the synchronization process for the first time, you may have multiple potential matches in CommPortal for a contact in Outlook, or vice versa, and these will be indicated as the synchronization proceeds.

If multiple matches are found, you will see a similar screen to that shown in Figure 86: Conflict Resolution Window on page 123.

- The Outlook contact's details are displayed on one side of the screen with all the possible matches within your CommPortal contacts on the other side of the screen.

- Using the radio buttons, you can either select one of your CommPortal contacts as the contact details you want to synchronize, or import the Outlook entry as a new Contact.

- Once you select a match to use and press **Continue,** CommPortal Assistant will attempt to synchronize the selected CommPortal contact with the Outlook contact.

- You should select **Stop Synchronization** to close the window and leave the conflict unresolved.

## Outlook/CommPortal Account Changes

If you have enabled synchronization and subsequently make any changes to your Outlook or CommPortal account - for example to change your default Outlook profile or your CommPortal account username - you will be prompted to confirm whether synchronization is still required with the new account.

If you do not wish to synchronize with the new account, select **Disable Synchronization**. You can later re-enable synchronization, or change your settings, using the **Settings** dialog described in Outlook Contacts Sync tab on page 115.

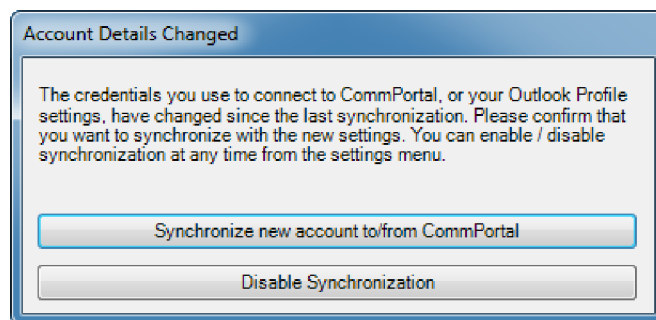**Figure 87: Account Details Changed**

# 9 Appendix: Using Call Me

> **Note:**
>
> The instructions in this appendix are written from the subscriber's perspective. If you wish, you can use them as the basis for your own information for your subscribers. However, they are not designed for direct distribution to end-users.

The Call Me feature allows you to create buttons and links that you can embed in a website or email that invites people to initiate a call with you. When someone clicks on the button or the link, they are taken to a website where they are prompted to enter their phone number. Once they have entered a number their phone will ring; when they answer, your phone starts ringing.

This offers essentially the same service to your contacts as a toll-free number (although some users may be charged as for an incoming call), but allows you to control and manage the service from CommPortal.

CommPortal includes full instructions on how to create the buttons, but Creating a Call Me button on page 125 provides a quick overview for creating a Call Me button.

## 9.1 Creating a Call Me Button

To create a Call Me button:

- Log into your account using CommPortal.
  - Your service provider will have given you the URL (web address) for logging into your account.
  - Log in using your telephone number, and your PIN or password (whichever you normally use to access CommPortal).
- Click on **Download** link on the CommPortal Home page.
- If you have the option to choose between apps on different platforms, click on **On your Computer**; otherwise, skip this step.
- Click on **Call Me** under **Computer** on the menu on the left.
- You will then see the following page.

**Figure 88: Download Call Me Page**

- Click on **Webpages or Emails** to create a button that you can use on webpages and emails.

  - If the **Webpages or Emails** option is grayed out, click on **Call Me Settings** and ensure that you have enabled Call Me buttons.

- This will launch the Wizard within CommPortal that will lead you through the process of configuring a Call Me button that you can then embed in webpages and emails.

## Call Me Button: Specify Options

To create a Call Me Button, please provide the following information.

### Step 1

Enter the telephone number you would like to be called on when a user clicks your Call Me Button.

555 5555 5555

### Step 2

Do you want to create a Call Me Button or a Call Me link?

● 📞　　　　　　Can be used in web pages and HTML e-mails

○ **Call Me**　　　Can also be used in non-HTML e-mails

< Back　　Next >　　Close

OK

**Figure 89: Call Me button creation wizard**

- Enter the number of the phone you want to be called on when people click your Call Me button.
- Choose whether you want to create a graphical button to embed in a website or HTML email, or a text-based link for use in non-HTML emails.
- Click **Next**.

**Figure 90: Call Me button selector**

- If you are creating a graphical button, select which style of button you want to use.
- Click **Next**.

## Call Me Button: Ready to Use!

**To add to an HTML email:**
You can copy and paste the button below into a web page or email signature, e.g. right-click it and choose 'copy', drag and drop it, or select it by dragging across it then press Ctrl-C.

CALL ME

**To add to a webpage:**
Paste this HTML into your website.

`<a href="http://████/CommPortal/callme.html?`

< Back    Next >    Close

OK

**Figure 91: Call Me Button Presentation Page**

- This screen displays the detail for the button you have just created.
- Copy and paste the image or HTML text as required.
- Click **Close** to exit the Wizard.

## 9.2 Managing Your Call Me Buttons
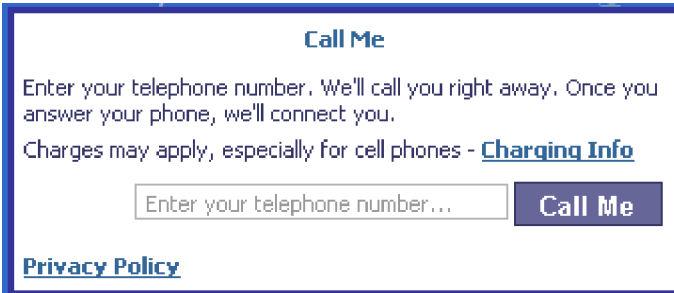
Once you have created them, you can manage your Call Me buttons using the options available on the **Calls Settings** page of your CommPortal account.

- You can control whether or not the Call Me service is active.

- When inactive, your existing Call Me buttons will not connect to your chosen phone. Instead when your potential callers click your Call Me button they are presented with a message stating that they should try again later.

- You can reinstate the service at any time using the same selection button.

- You can also completely revoke all your existing Call Me buttons. This will permanently deactivate any existing Call Me buttons even if your service is currently active. If you subsequently want to start using the Call Me feature again, you must create new buttons.

## 9.3 Call Me Experience

When a potential caller clicks your Call Me button the following page opens in their default browser. The caller can click on the **Charging Info** link to see whether they might be charged for this call.
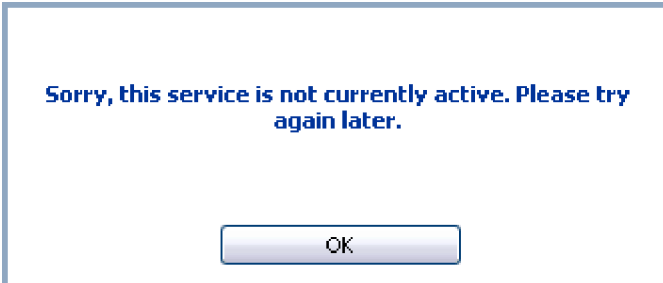


**Figure 92: Call Me Link - Active**

The page itself includes clear instructions on how to use the button. The potential caller simply enters their contact number in the field (they are prevented from entering a premium-rate number) and presses the Call Me button. Their phone then rings; when they pick up, your chosen number will then ring.

If you have temporarily suspended your Call Me service, the potential caller will see the following page instead.



**Figure 93: Call Me link - Inactive**

# 10 Appendix: MaX UC Desktop

> **Note:**
>
> From the v2.31 release, the Accession Communicator for Desktop and Mobile clients are renamed as MaX UC Desktop and MaX UC Mobile, and are collectively known as the MaX UC Clients.

MaX UC Desktop provides soft phone and Instant Messaging functionality on Windows and Mac computers.

Once MaX UC Desktop has been downloaded, subscribers have access to a comprehensive set of in-app Help file that describes how to use the MaX UC Client features and troubleshoot common problems.

MaX UC Desktop subscribers can also use Meetings to set up web conferences with one or more of their contacts. See for more information.

# 11 Appendix: MaX UC Mobile

> **Note:**
>
> From the V2.31 release, the Accession Communicator for Desktop and Mobile clients are renamed as MaX UC Desktop and MaX UC Mobile, and are collectively known as the MaX UC Clients.

MaX UC Mobile is a VoIP soft client that you can download from an app store onto iOS and Android mobile devices.

- Depending on the type of account you have, MaX UC Mobile enables you to:
    - use your existing phone number to make and receive calls from the MaX UC Client app on your phone, in addition to other devices which have the MaX UC Client app installed onto them
    - use CommPortal features including Easy Call Manager, Visual Voicemail, and Click-To-Dial on the MaX UC Client UI
    - seamlessly uplift calls to video at the touch of a button and without disrupting the call
    - jump calls between landline, smartphone and tablet devices
    - use Instant Messaging and/or SMS messaging.

If you have previously deployed CommPortal Mobile, you may have a voiceless MaX UC Mobile client that enables you to access various aspects of your CommPortal account including Easy Call Manager, Visual Voicemail, and Click-To-Dial on the MaX UC Client UI, but does not allow you to make calls (other than by using Click-To-Dial) or use Instant Messaging.
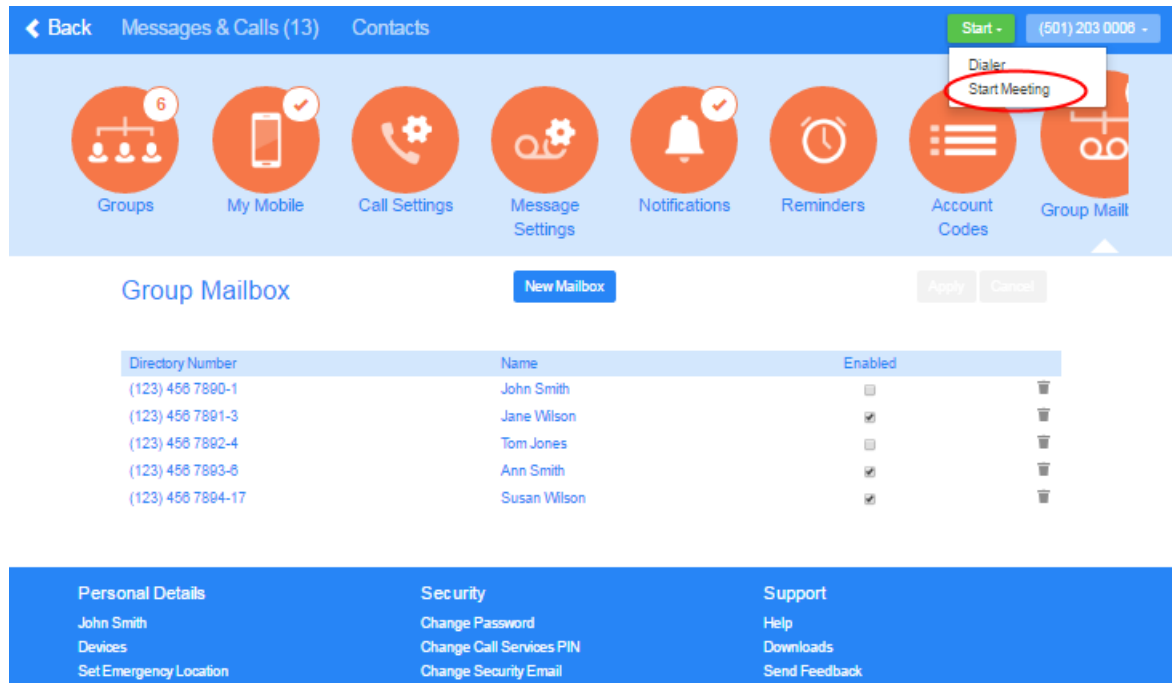
Once MaX UC Mobile has been downloaded/intstalled, subscribers have access to an in-app tutorial that describes how to use the MaX UC Client features on their mobile device.

# 12 Appendix: MaX Meeting

MaX Meeting is part of the MaX UC Client solution. It provides audio and video conferences over the web, including web collaboration features such as screen sharing, whiteboard annotations, and presentation capabilities. Although you have to be subscribed to MaX Meeting to set up a meeting, non-subscribers can join a meeting by accepting a meeting invitation.

Meeting is an audio and video conferencing solution that offers many advanced collaboration tools including online meetings and webinars.

Subscribers can create a Meeting by clicking the **Start** link on the CommPortal dashboard and selecting **Start Meeting**. If the subscriber has a license to create Meeting Webinars, they will also see a **Manage Webinars** link here.



**Figure 94: Creating a Meeting from the CommPortal dashboard**