TDS® *managed*IP

Administrator User Guide

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Administrator User Guide

Understanding the Administrator Hierarchy

Types of Administrators

Enterprise Administrator: One contact in the company who has access to the entire organization. This person can set up all Groups, Departments, and Users within the Enterprise.

Group Administrator: A person who has administrative rights to a specific Group and can configure and manage any Department or User assigned to their Group.

Department Administrators: A person who has administrative rights to a specific Department and can configure and manage Users assigned to the Department.

The diagram below summarizes the hierarchy.

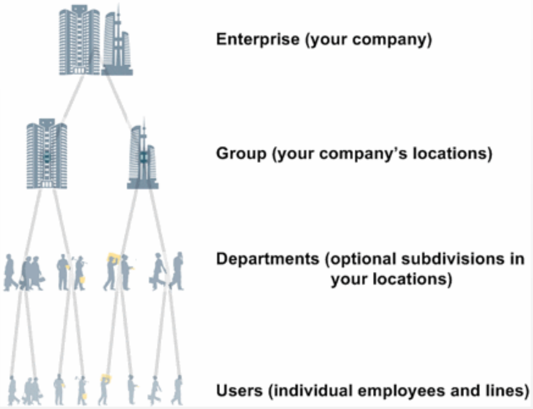

Figure 1 Enterprise Hierarchy

The Role of an Administrator

The Administrator is responsible for provisioning services to the Group, Department, or individuals (Users). This includes resetting passwords, updating Users' profiles and changing the parameters of specific services for the Group or individual Users, such as Voice Messaging, Auto Attendant, and Custom Call Routing.

Logging into Your *managed*IP Web Portal

1. Log in at www.tdsmanagedip.com.
2. Enter your User ID and Password (provided by TDS).

   User ID: ______________________________

   Password: ______________________________

3. This will take you to the Announcement page.

Note: View the "Administrator Web Portal Tutorial - Navigation to learn about navigation tips and how to maneuver within the portal. You can access this video on the *managed*IP support site at support.tdsmanagedip.com.

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Setting Up Your Enterprise Information

Enterprise Profile

The Enterprise Profile allows you to set up your company information, change your Enterprise Administrator login password that was assigned to you, view Call Processing Policies, and pull reports to quickly see what users are in each group or department.

To update the Enterprise Profile:

1. Hover over Profile and click "Contact Information"
2. Update your company info
3. Update the Administrator Contact Information
4. Click "Save"

To change your password:

1. Hover over Profile and click "Change Password"
2. Enter the Current Password assigned by TDS
3. Enter your New Password
4. Re-type your New Password
5. Click "Save"

Note: For security purposes you will be required to change your default password during your first login. Please see page 29 for passcode rules

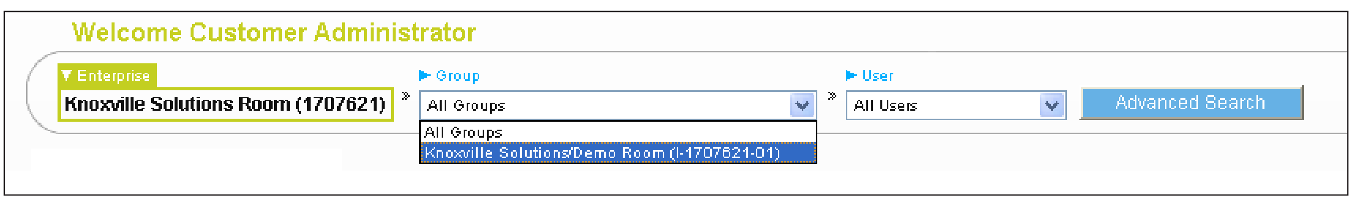
Resources and Utilities

Resource and Utilities are both view-only menus. Resources will show the Group and User Services Authorizations and Service Pack Consumption. Service Descriptions are in alphabetical order and can be very helpful in learning your new system features and functionality. The Utilities Menu provides a view of all users in your Enterprise, along with quick links to view detail and create a PDF of Directory information. Answer Confirmation allows you to create a custom message that will be heard for features using Answer Confirmation.

Setting Up Your Group Level Information

Accessing Groups

To access the Group you would like to manage or configure, select the Group name from the dropdown menu.



Group Profile

Update the Group Profile Section with your company information. Typically, each physical business location is a unique Group.

Edit Group Information:

1. Select your Group from the dropdown filter
2. You will automatically be routed to "Profile, Group Profile"
3. Enter a Group Name (if you have multiple Groups, be sure to give each one a unique name)
4. Enter the Group Address information
5. Complete Administrator information (Main contact for the particular Group)
6. Click "Save"

Note: The Administrator's Contact Name, Phone, and Email Address are for reference only. To add an Administrator, see the Administrator section below.

Group Dialing Plan (Location Codes)

If you have multiple locations where the last 3 or 4 digits from one employee could potentially be the same as another employee (e.g., location A and B both have an extension of 2200), assign a location code for each Group. By assigning a Location Dialing Code—such as 55 for Group A—employees will dial 55 plus the extension (e.g., 552200) to reach the correct party. If you have all unique 3- or 4-digit extensions for all employees, this feature will not be needed.

To set up a Location Dialing Code:

1. Select the Group requiring a location code
2. Scroll down to Group Dialing Plan
3. Enter a 1 or 2 digit Location Dialing Code
4. Click "Save"

Note: For calls made within a Group (same site location), Users will not dial a location code. Therefore, the *managed*IP – Assistant Toolbar Group Directory will only display the Location Dialing Code for other locations in the Enterprise. Users may need to restart the *managed*IP Assistant – Toolbar application before they can view the Location Dialing Codes in the Group Directory.

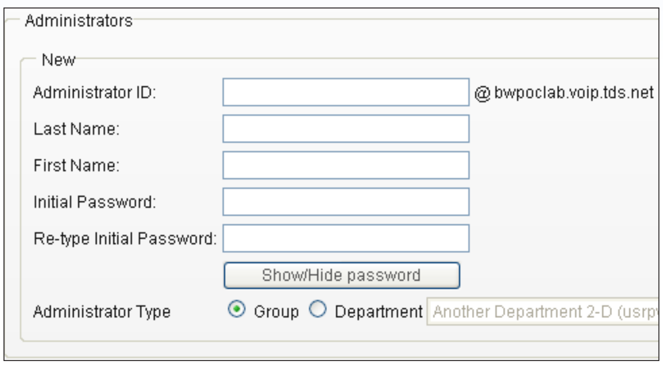
Administrators

Depending on your organization, you may have multiple Groups within your Enterprise. You can add Group and/or Department Administrators.

To add an Administrator:

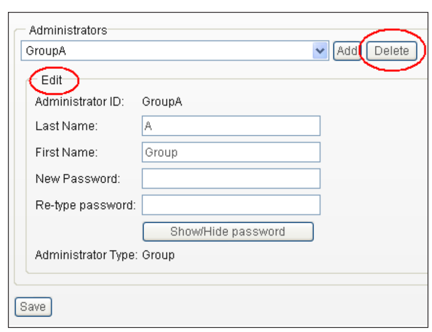
1. Select the Group from the dropdown menu
2. Hover over Profile
3. Click on "Administrators"
4. Click "Add" and enter in the information
5. Select Administrator Type (Group or Department) toggle
6. Click "Save"

Note: If you are going to assign Department Administrators, you will need to set up your Departments first. All available Departments will appear in the dropdown menu after the Department selection. To learn more, go to the Departments section of the User guide.



To edit or delete an Administrator:

1. Select the Group from the dropdown menu
2. Hover over Profile
3. Click on "Administrators"
4. Select the Administrator from the dropdown menu
5. Edit the information or click the "Delete" button
6. Click "Save"

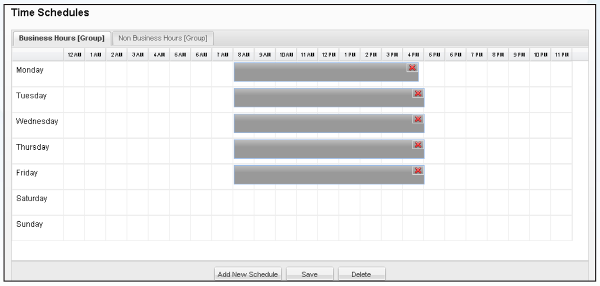


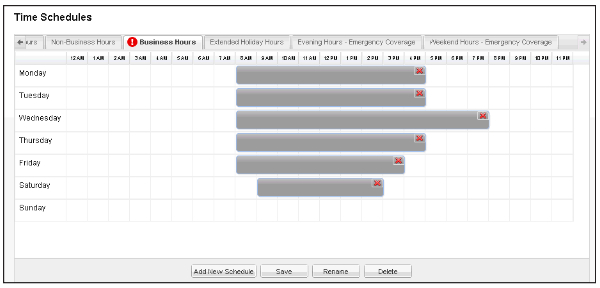
Time Schedules and Holiday Hours

Group Time Schedules and Holiday Schedules allow you to set up standard schedules to use when configuring features and services, such as Auto Attendants, Custom Call Routing, and other User features. We recommend setting up a Business Hours Schedule. By doing this, services like an Auto Attendant will play an automatic after-hours greeting and dialing menu when the business is not open. Time schedules are available for use (but may not be modified) by all Users associated with the Group.

To program the company's Time Schedules:

1. Select your Group from the dropdown menu.
2. Hover over Profile and click "Time Schedules".
3. Click the "Add New Schedule" button to define a new schedule.
4. Type in a name for the new schedule (e.g., "Business Hours") and click "OK".
5. Using the mouse, click and drag over the timetable to define your desired time schedule. Click "Save" when complete to save your changes.
6. To add an additional Time Schedule, Click "Add Time Schedule" and follow the guidelines above. You'll notice that each time schedule defined may be accessed via a tab above the timetable with the time schedule's name(s).

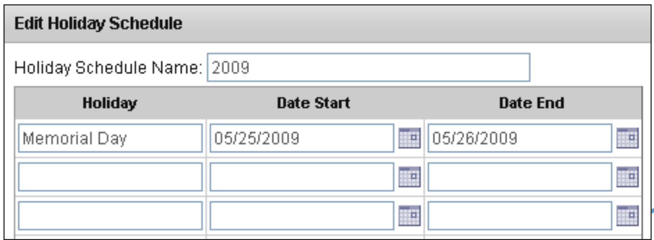




To define Holiday Hours:

1. Select your Group from the dropdown menu
2. Hover over Profile and click "Holiday Schedule"
3. Click "Add Holiday Schedule"
5. Populate the name for the schedule (e.g., Memorial Day)
6. Modify schedule to reflect your holiday hours
7. Click "Save"

Note: Holidays must be added/modified every year as they are date specific and change annually. For example, Thanksgiving moves every year to fall on a Thursday so the date changes.



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Departments

Departments are subsets of Users within a Group for the purpose of assigning Administrators and/or services to a subset of Users.

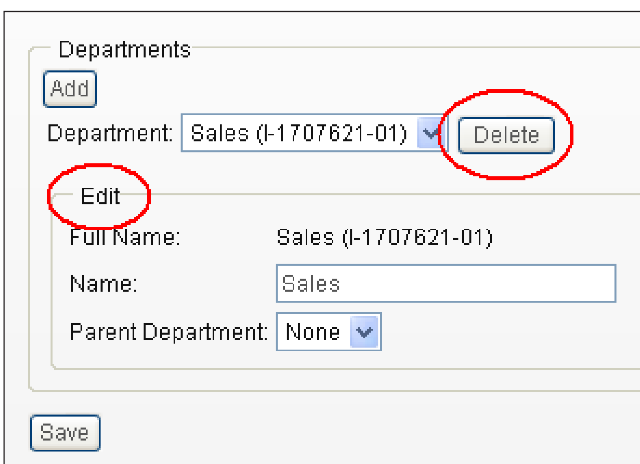
To add a Department:

1. Select the Group from the dropdown menu
2. Hover over Profile and click "Departments"
3. Click "Add"
4. Enter a Name for the Department
5. Select a Parent Department, if applicable (not common)
6. Click "Save"

To edit or delete a Department:

1. Select the Group
2. Hover over Profile and click "Departments"
3. Select the Department from the dropdown menu
4. Edit the information or click the "Delete" button
5. Click "Save"

Note: If there are Users, Administrators, or services assigned to a Department, you must un-assign them before you can delete the Department.

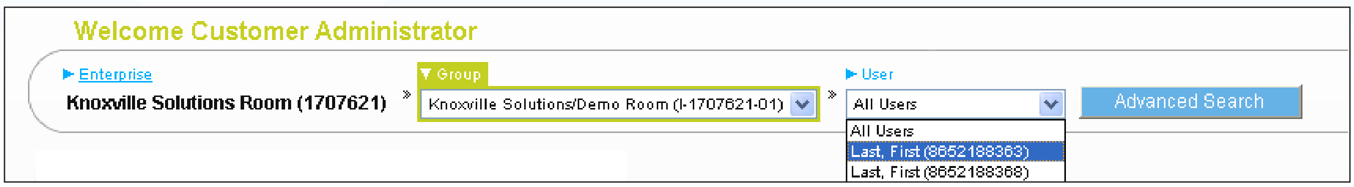


Setting Up Your User-Level Information

The next step to setting up your service is to associate an employee's name to a telephone number. TDS will have all the telephone numbers in the system listed by Group. You will want to edit these by adding the employee's last name and first name with the number. This will be helpful for editing the User's services, if necessary, in the future.

Initial setup of Users:

1. Select the Group
2. Select a telephone number from the User dropdown filter
3. In the User Info section, enter the employee's Last Name and First Name
4. Enter the Calling Line ID, Last Name and First Name displayed for internal calls
5. Assign a Department, if applicable
6. Click "Save"



Note: The remaining information in the User profile will be completed by the User. Continue with all of the telephone numbers in the Group by selecting them on the User dropdown menu. Once completed, move to the next Group, if applicable.

User Tags

The "User Tags" feature allows the *managed*IP Administrator to make changes and modifications to phone features and functions on a per user, per phone basis. This enables the Administrator to provide specific customizations for individual users to help improve the usability of the phones.

To change a Tag value:

1. Select the Group
2. Select a telephone number from the User dropdown filter
3. In the "Device" section of the Profile page, click "Modify Tags". A pop-up window containing the list of available tags with the current tag value will appear
4. Locate the tag to be changed and update the new value of the tag. Tag descriptions are available on page 32 of this guide.
5. Click "Save"
6. Click "Rebuild Device Config File"
7. Verify that the message "Device config file successfully rebuilt" is displayed

Note: For the changes to take effect, the phone must be reset. Rebooting the phone will disconnect any call that may be in progress. Also, different phone models may have different tags available to them. The table on page 32 has a complete list of all tags and the availability of tags by phone.

Understanding Your Group Services

Group Resources

Resources provide the Administrator with account information on Service Authorizations and Numbers. Service Authorizations are a summary of the types of Service Packs assigned to the Group, a description of Group and User Services with limits and allocations, and the telephone numbers assigned and ordered for the Group. This information is based on the features and services your company has purchased from TDS.

Configuration of Group Services

Auto Attendant

Auto Attendant is an automated receptionist that answers incoming calls for the Group, based on Time Schedules set by the Administrator. It provides your callers with:

- Business and After-Hours Greetings
- Dial-By-Name Directory
- Destination-based Call Routing

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Profile

To modify an Auto Attendant:

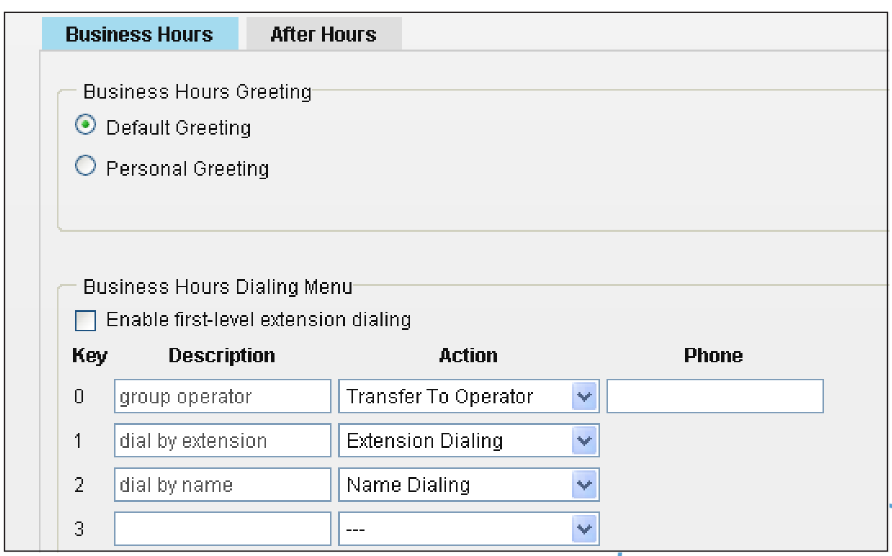
1. Select the Group
2. Hover over Group Services and click "Auto Attendant"
3. Select the Auto Attendant you wish to modify from the dropdown filter
4. In the Profile, enter the "Name" of your Auto Attendant
   - We recommend keeping your naming scheme short (e.g., "Main_AA")
5. If the service is limited to a Department, assign the Department
6. From the Business Hours dropdown, select Business Hours Schedule
   - (If "Every Day All Day" is chosen, the Auto Attendant will not present callers with After Hours Greeting or options. You must have a Business Hours Time Schedule created; see Time Schedules in this guide).
7. Select your Holiday Schedule, if configured
8. Select the Scope of Extension Dialing. This determines whether the Auto Attendant can redirect callers by extension to any User in its Enterprise, Group, or Department.
9. Select the Scope of Name Dialing. This determines whether the Auto Attendant can redirect callers by name to any User in its Enterprise, Group, or Department.

Note: The extension and name dialing scope defaults to Enterprise. If you want to limit a caller's options to a specific Group or Department, select the correct toggle.

10. Select Name Dialing Entries. This determines the format that callers will use for the dial-by-name directory.
11. Click "Save"

Business Hours Tab

The business hours option allows you to customize your Auto Attendant during Business hours. If you leave everything set to default, callers will hear a system greeting telling them their call is being answered by an automated attendant and they will then be presented with the standard Interactive Voice Response (IVR) options.



To configure Business Hours IVR:

1. Select either the Default or Personal Greeting button. (If Personal is selected it requires the recording of the message to be heard by callers.)
   - Recommended: You can record a custom greeting in your Voice Portal (instructions provided below).
   - Optional: If you record a greeting (.wav file) using Windows Recorder or another sound recorder, click the Browse button and select the file.
2. Check the "Enable First-Level Extension Dialing" box if you would like to allow the caller to enter the extension of the party they wish to reach without selecting a menu option first.

Note: If you enabled first-level extension dialing, you are not able to use the numeric key that is the same as the first digit of your extension dialing range. For example, your extensions range from 4500–4599, so you will not be able to use 4 in the menu options to the caller.

3. Specify the menu options for callers, as stated in the greeting you record or selected. Once complete, click Save.

Your menu options are:

Key: List of the keys available on a telephone keypad to which you can assign actions shown in the following table.

Description: An optional description for the menu option.

Action: A drop box that allows you to select the action to be performed. The following table describes the available actions. This is a required field.

Phone Number: When you have selected an action that transfers a call, a number must be specified. For internal calls, enter a 4-digit extension. For outside calls, enter the 10-digit telephone number.

This Chart shows all the possible actions, what the caller will hear, and what happens when a particular action is chosen:

Action	Prompt played to caller	What happens
Transfer to operator	"Please wait while your call is transferred to the operator."	Call is transferred to the specified number. If the number is not valid, the call ends with the message "Your call cannot be transferred, please try again later, thank you".
Transfer with prompt	Please wait while your call is transferred."	Call is transferred to the specified number. If the number is not valid, the call ends with the message "Your call cannot be transferred, please try again later, thank you".
Transfer without prompt	None	Call is transferred to the specified number. If the number is not valid, the call ends with the message "Your call cannot be transferred, please try again later, thank you".
Name dialing	None	Access to name dialing
Extension dialing	None	Access to extension dialing
End call	"Thank you for calling."	Call is released
Repeat menu	None	Menu greeting is replayed
--- (Indicates no action has been selected.)	Not applicable	Menu greeting is replayed

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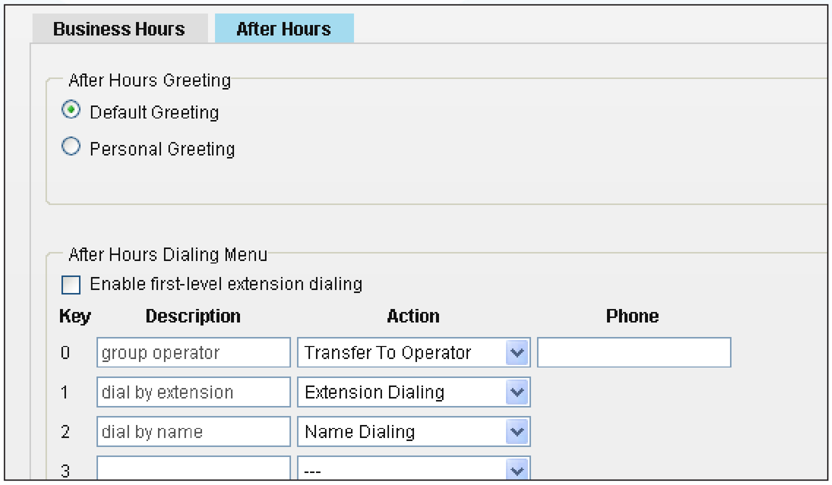
After Hours - Tab

After Hours does not require a Time Schedule. The system will automatically route to the After Hours Greetings any time outside of your "Business Hours Time Schedule." In addition, if you established a "Holiday Schedule" the After Hours greetings will play during these times. You configure the After Hours IVR selections in the same manner as your Business Hours.

To configure After Hours IVR:

1. Select "After Hours" tab
2. Select either the Default Greeting or Personal Greeting (requires the recording of a message to be heard by callers)
3. Check Enable first-level extension dialing, if required
4. Populate the Description, Action, and Phone Number fields for each key option, as appropriate
5. Click "Save"



Sample IVR Menu

To help you think about setting up your Business Hour and After Hour menu options, an example is provided below:

– Press 0 or wait on the line to reach the Operator.
– Press 1 to dial by extension (no information is needed for callers to have this option).
– Press 2 to dial by name (no information is needed for callers to have this option).
– Press 3 to reach the marketing Department (enter "Marketing" in the Description column and the phone number of the marketing representative or Custom Call Routing number in the Number column).
– Press 4 to reach the customer service Department (enter "Customer Service" in the Description column and the phone number of the customer service representative in the Number column).

Recording Personal Greetings for Your Auto Attendant

To Record Greetings via the Phone:

1, Dial the Group Voice Portal Number

2. Enter the 4-digit Voice Portal Extension Number

Note: This is not the same phone number as the Auto Attendant.

3. Enter your Administrator voice portal default password (Default password will be provided by TDS, to reset or change this password, hover over Group Services and click Voice Portal scroll down to the Change Administrator Password section)

Voice Portal Number: ______________________________

Password: ____

Note: If using a *managed*IP telephone, press the * key to return to the Main Menu before being prompted to enter your mailbox number. If not, enter the 10-digit telephone number when prompted for the mailbox number. When initially accessing Voice Messaging, you will be prompted to change your password. The maximum length allowed for .wav and .mov files is 5 minutes.

Call Park

The Group Call Park feature allows a User to hold or suspend a call for an extended period of time, similar to Call Park. However, with Group Call Park, a group of Users is established and assigned to a Call Park group by the Administrator. When any User in that Group parks a call using the Group Call Park feature access code (#58), the system will automatically find an available User to park the call against, searching the Group Call Park list in the sequence the Users are entered. In a busy parking environment, this avoids the need to search for an available User to park a call against (since only a single call may be parked against any user at a given time).

If the Administrator enables the option "Enable Parked Destination Announcement", then a member of the Call Park group parking the call (using #58) will hear a system announcement stating "The call is parked against <extension>". In addition, the phone's display will update with target's Caller ID (name and number) for the period determined by the "Display Timer" (2-15 seconds).

To create a new Call Park Group:

1. Select the Group
2. Hover over Group Services and click "Call Park"
3. Select "Add"
4. Enter the Call Park Group Name
5. Click "Save"

Call Park Groups Settings:

1. Select the Group.
2. Hover over Group Services and click "Call Park".
3. Set your recall timer to define the length of time a call will remain parked before recalling to the originator of the parked call. The default value is 45 seconds.
4. Set your "Display Timer" (2-15 seconds) to determine how long the auto-selected park destination will display to the originator on the phone before it returns to an idle state.
5. Check if you want the Enable Parked Destination Announcement applied to this service. If this is checked, you may hear an announcement stating the park destination of the call.

Note: The "Call Park Settings" above will apply to all Call Park Groups you establish.

6. Click "Save"

To add or remove Users in the Call Park Group:

1. Select the Group
2. Hover over Group Services and click "Call Park"
3. Select the Call Park Group you wish to edit
4. Search by Department, Last Name, or First Name to quickly locate users
5. Use the Add or Remove buttons to move Users to/from the Assigned Users box
6. Click "Save"
7. After selecting the users, use the "Move Up" and "Move Down" keys to order them in your group. This defines the specific order calls will be parked by the system.

Note: A User desiring to park a call using Group Call Park must be a member of the Call Park group itself.

To delete a Call Park Group:

1. Select the Group
2. Hover over Group Services and click "Call Park"
3. Select the Call Park Group in "Group Name" dropdown
4. Click "Delete"

Note: Enabling the Parked Destination Announcement does not have any impact on the Call Park service. Call Park timer functions and destination announcement will be the same for all Call Park Groups. The recall timer can be set for 30–600 seconds and the default is set for 45. The display timer can be set for 2–15 seconds, with the default set for 5.

Call Pickup

The Call Pickup feature allows Users to answer a call that is ringing at another extension within their Call Pickup Group. If more than one phone within the Group is ringing, the phone that has been ringing the longest is the one that gets picked up. Once a call is picked up from another extension, the extension that was ringing is free to receive other calls. To use Call Pickup dial the feature access code assigned for this service. Feature Access Codes can be found by selecting a Group, hover over Utilities and select Feature Access Codes.

To add a Call Pickup Group:

1. Select the Group
2. Hover over Group Services, click "Call Pickup"
3. Click "Add"
4. Enter the name of your Call Park Group
5. Click "Save"

To delete a Call Pickup Group:

1. Select the Group
2. Hover over Group Services, click "Call Pickup"
3. Select the Call Pickup Group in the dropdown menu
4. Click "Delete"

To add or remove Users in the Call Pickup Group:

1. Select the Group
2. Hover over Group Services, click "Call Pickup"
3. Select the Call Pickup Group in the dropdown menu
4. Search by Department, Last Name, or First Name to quickly locate users
5. Use the Add or Remove buttons to move users to/from the Assigned Users box
6. Click "Save"

Emergency Zones

Emergency Zones allows you to designate one person to receive an email notification when any User in a Group dials 911. It will provide the caller's telephone number and name along with the time the call is placed.

To activate this feature:

1. Select the Group
2. Hover over Group Services, click "Emergency Zones"
3. Check the box to activate service
4. Enter the email address
5. Click "Save"

Note: The email notification could be delayed and is not for response to an emergency but for tracking outgoing emergency calls made within the Group.

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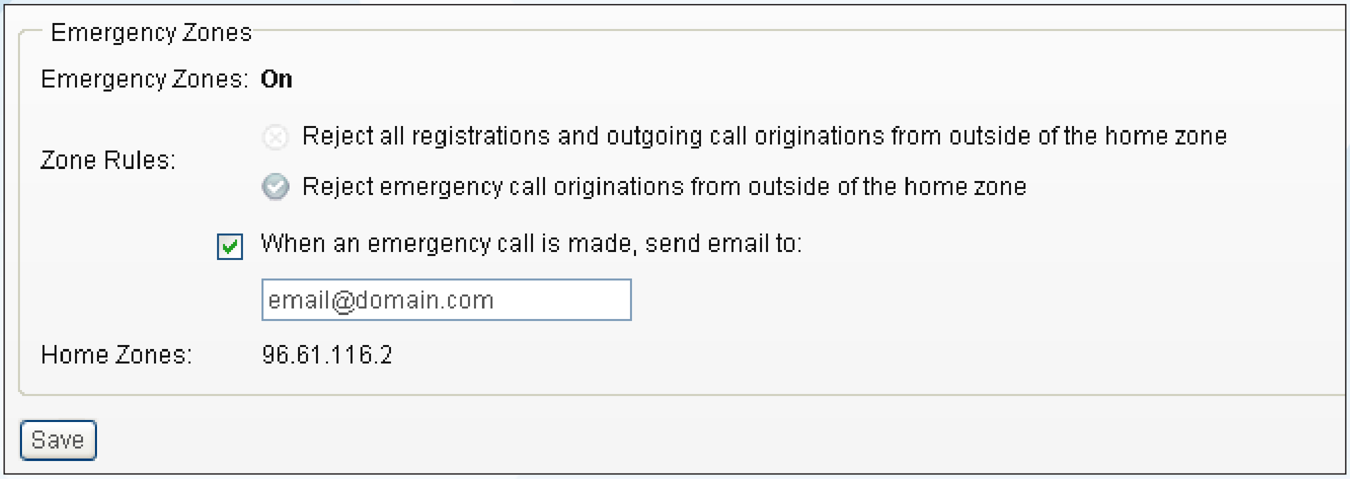
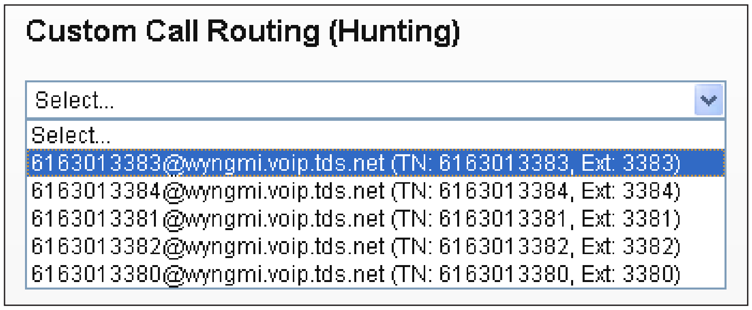


Custom Call Routing (aka Hunting)

Custom Call Routing provides a way to route calls to a Group of selected Users via an Auto Attendant or Direct Inward Dial number.

Accessing Custom Call Routing Groups:

1. Select Group
2. Hover over Group Services, click on "Custom Call Routing (Hunting)"
3. All Custom Call Routing Groups assigned to your business will be displayed in the dropdown menu



Call Routing Profile Settings:

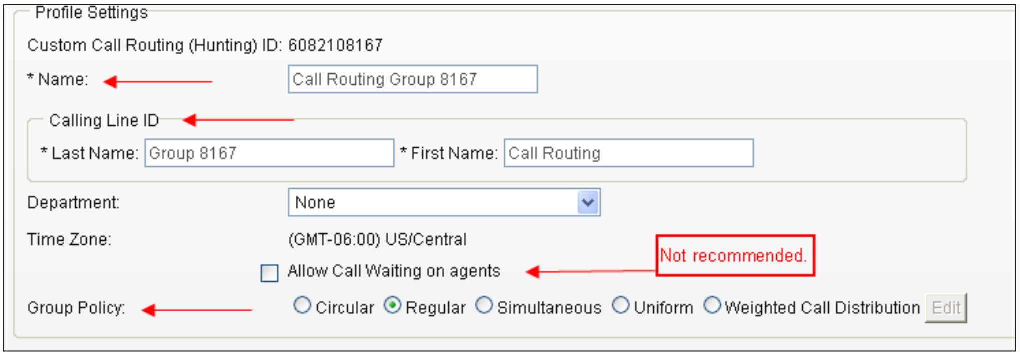
1. Select the Call Routing Group you wish to modify
2. Enter the Call Routing Group Name
3. Enter the Calling Line ID Last Name and Calling Line ID First Name

Note: The Calling Line ID First and Last Name will be displayed to Users receiving calls from the Custom Call Routing Group. We recommend keeping this short (e.g., "CCR_Support"). This will be displayed along with the originating party's caller ID (room permitting).

4. Select the Department to assign the Call Routing (if applicable)
5. The Time Zone is a default
6. We recommend not checking the "Allow Call Waiting on Agents" box as it could impact customer hold times. If you desire Call Routing Group members to receive multiple calls at once, check this box.
7. Select the Group Policy determining how calls are routed to agents

Group Policy Definitions:

- **Circular:** Routes calls through agents in the order they appear in the list, starting with the agent that follows the last agent to receive a call.
- **Regular:** Route calls through agents in the order they appear in the list, starting from the top of the list each time.
- **Simultaneous:** Route calls to all agents at the same time.
- **Uniform:** Route incoming calls to all agents in order, starting with the agent who has been idle the longest and ending with the agent who most recently answered a call.
- **Weighted Call Distribution:** Route so that incoming calls are routed to idle agents based on percentages you assign.



To Assign Percentages for Weighted Call Distribution:

1. Click Edit
2. Assign the percentages for each agent
3. Click "Save"

Note: Percentages must equal 100%.

Weighted Call Distribution

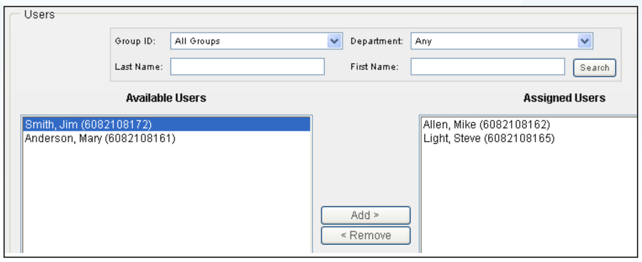
User ID	Weight	
6082102554@bwpoclab.voip.tds.net	33	%
6082102553@bwpoclab.voip.tds.net	33	%
6082102559@bwpoclab.voip.tds.net	34	%
	===	
	100 %	

Call Routing - No Answer Settings:

1. Check the box marked "The Skip to next agent" option
2. Determine number of rings at each station
3. Optional - The "Forward Call After Waiting" option prevents callers from spending a long duration listening to ring-back tone, especially in large Call Routing Groups. Callers can be forwarded to the company receptionist or a voice mailbox. If enabled, you will need to specify the time in seconds and the call forward destination. (Generally, standard ring cycle is 6 seconds.)

Call Routing - Adding/Removing Users:

1. Search by Group, Department, Last Name, or First Name to quickly locate users
2. Use the Add or Remove buttons to move users to/from the Assigned Users box
3. Click "Save"

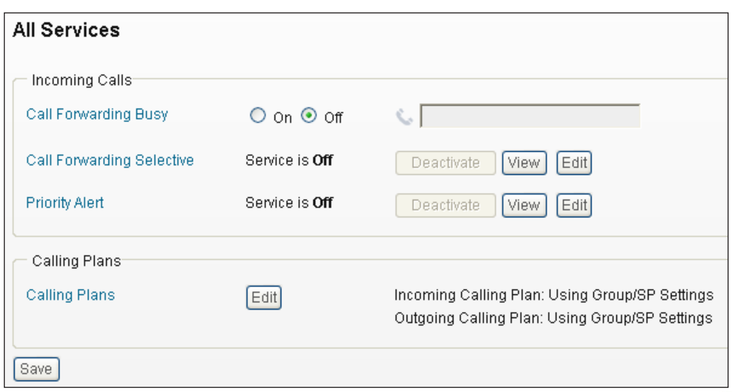


To take your call routing Groups to the next level and enhance the ability to serve your incoming calls, you can assign additional routing and alert features to the Custom Call Routing Group

Additional Call Routing Services:

1. Select Group
2. Hover over Group Services, click "Custom Call Routing (Hunting)"
3. Select the Custom Call Routing Group you want to configure
4. Hover over Calling Features, click "All Services"

Here you can assign additional features to your Call Routing Number. Some of these features include Call Forward Busy, Call Forward Selective, and Priority Alert.



Call Forward Busy

Route calls when all agents are busy. For example, if everyone is on the phone, you can route callers to another individual or even another Call Routing Group.

To set up Call Forward Busy:

1. Toggle "Call Forward Busy" On or Off
2. Assign a "Call forward number"

Note: You can Call Forward to any phone number including an Auto Attendant, another Call Routing Group, an internal extension, voice mailbox, or a phone number outside your location.

Call Forward Selective

Assign a time schedule to the Call Routing Group. For example, route calls directly to an Auto Attendant for after-hour calls or set up time schedules for On Call technical support that automatically forwards calls to someone's cell phone at specific times.

To set up Call Forward Selective:

1. Click "Edit"
2. For a default call forward number, enter the number
3. Click "Add Rule"
4. Enter in the Description of the rule
5. Select the Time Schedule you want the rule active

Note: You must set up "Time Schedules" prior to configuring this service. See the Time Schedules section of this guide.

6. Select the toggle for what number you want to forward calls to:
   a. Default forward number (assigned in step 2)
   b. Alternative number (such as an after hours call center)
7. Establish what incoming number you want to follow this rule:
   a. All Incoming number
   b. Specific phone numbers, then enter in the specific telephone numbers desired
8. Click "Save"

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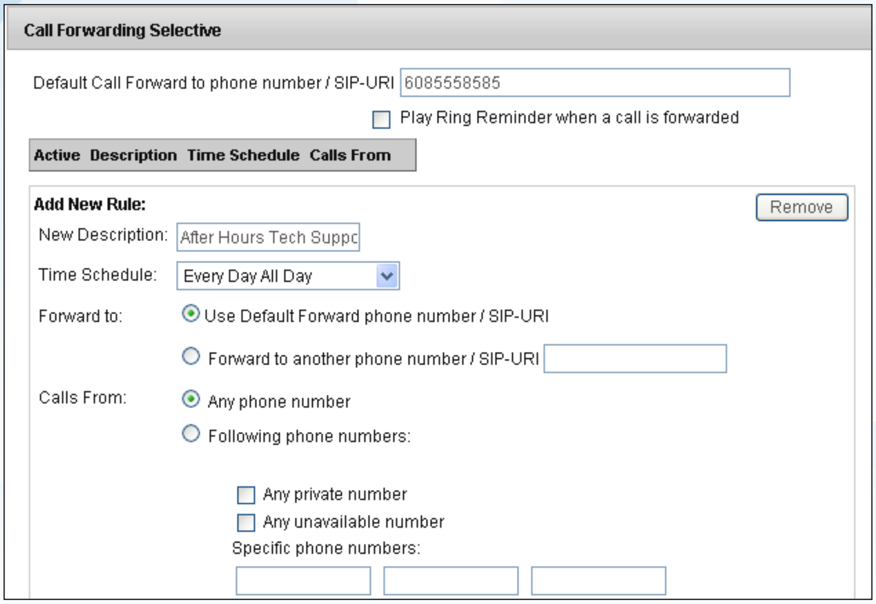
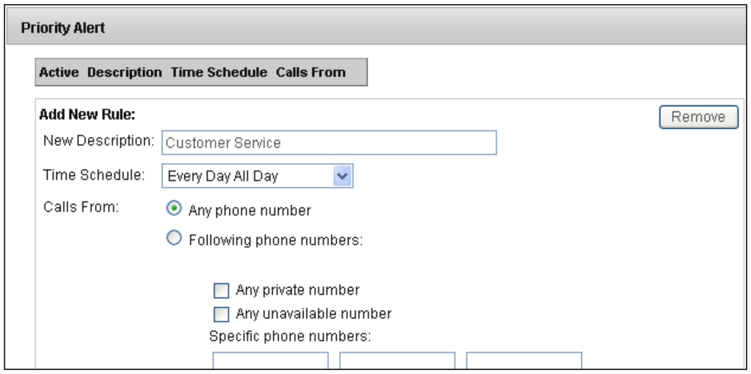


Priority Alert

Create a distinctive ring for calls coming from the Custom Call Routing Group so employees can differentiate between DID calls and the Custom Call Routing Group calls.

To set up Priority Alert:

1. Click "Edit"
2. Click "Add Rule"
3. Enter in the Description of the rule
4. Select the Time Schedule to "Every Day All Day"
5. Select the toggle for "Any Number"
6. Click "Save"



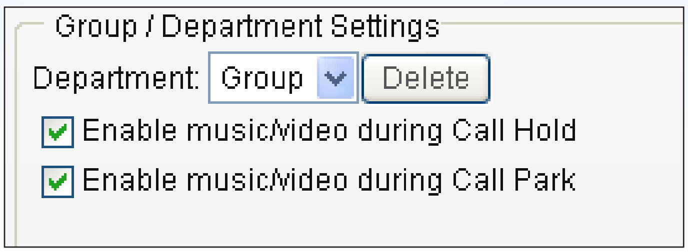
Note: This feature is highly recommended. This is a useful feature to inform agents when they are getting a Call Routing Group call.

Music On Hold

Music on Hold provides your callers with audio during call hold and call park. By default, a pre-configured music selection will be played to callers while on hold or when parked.

To disable Music on Hold:

1. Hover over Group Services, click on "Music on Hold"
2. Select the Group or Department
3. Uncheck to "Enabled music during Call Hold"
4. Uncheck to "Enabled music during Call Park"
5. Click "Save"
6. Continue for all Groups and/or Departments

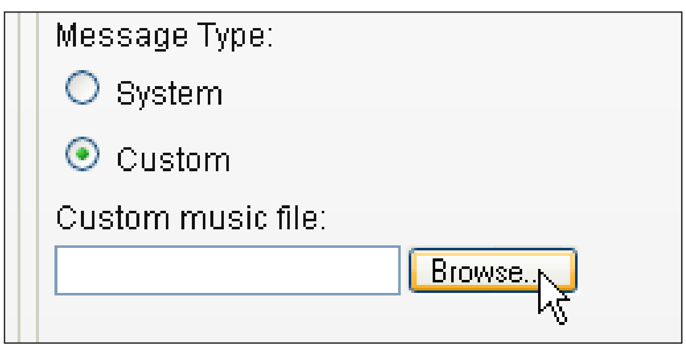


Note: You must establish Departments before you are able to edit the Music on Hold for the Department

Customize Music on Hold by uploading your own music file or recorded announcement.

To personalize your Music on Hold:

1. Click on the "Custom" toggle
2. Browse for your .wav file
3. Click "Save"



Account/Authorization Codes

You may select the use of either Account Codes or Authorization Codes for outgoing calls with your *managed*IP Group.

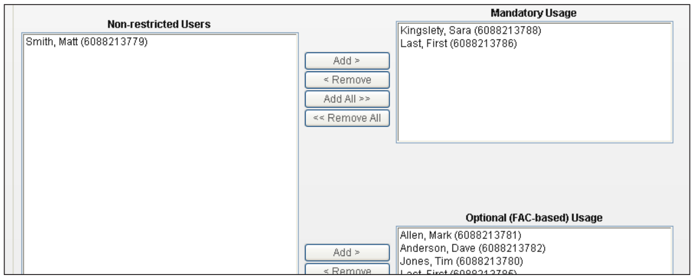
- **Account Codes:** Non-validated codes that are entered by a User prior to placing a call. The system ensures that codes provided by Users contain the required number of digits, but does not validate codes entered. You may mandate that a User always enters an Account Code prior to placing a call ("Mandatory Usage") or you may make this optional, requiring the User to dial a Feature Access Code (FAC) prior to placing the call.
- **Authorization Codes:** Validated codes which are required prior to placing a call. Calls are not connected unless a valid code is entered. These mandatory codes are defined as a specific length (2 -14 digits) and have a specific value, defined by the Administrator.

With the use of both, your business will receive a detailed monthly report, sorting your calls by Account or Authorization codes. In addition, if you subscribe to "Enhanced Call Detail Reporting", your reports will provide the Account Code entered by the users. Although this feature may be used for both local and toll calls, your monthly report (mailed to your business) will only include the detail for toll calls.

To configure Account Codes:

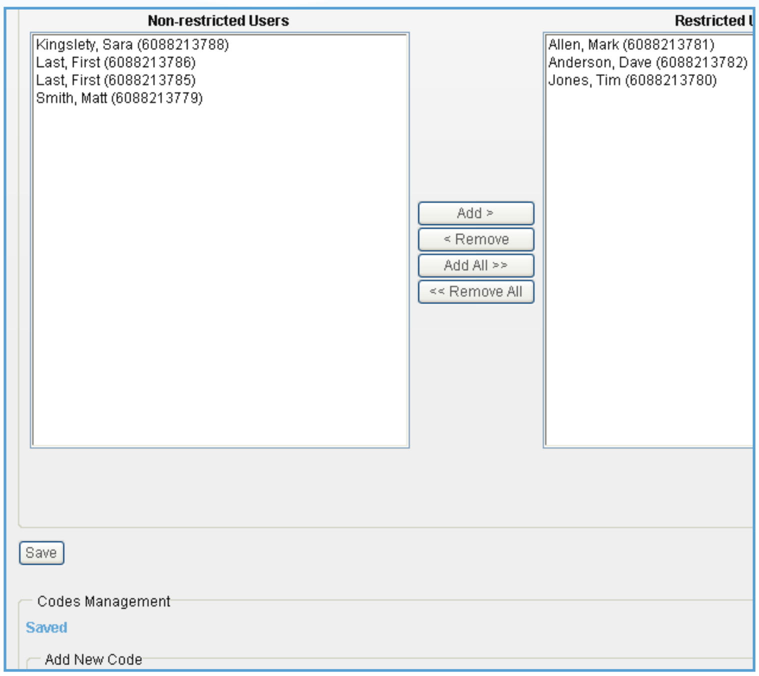
1. Select the Group.
2. Click Account/Auth Codes in the left navigation bar.
3. Click Account Code button.
4. Specify the number of digits (length of codes) the User must dial to make/log call.
5. Check the box "Allow Local and Toll-Free Calls Without Account/Authorization Code" if you choose to allow Users to make these types of calls without a code.
6. Search by Department, Last Name, or First Name to quickly locate users.
7. Use the Add or Remove buttons to move users to the appropriate box for mandatory or optional usage.
- The Mandatory Usage box will require all users assigned to enter an Account Code before their call can be placed.
- The Optional Usage box will require users to enter a feature access code prior to making a call to prompt them to enter an Account Code.

8. Click "Save."



To configure Authorization Codes:

1. Select the Group.
2. Click Account/Auth Codes in the left navigation bar.
3. Select the Authorization Code button.
4. Specify the number of digits (length of codes) the User must dial to make/log call. All codes must be the same length.
5. Check the box "Allow Local and Toll-Free Calls without Account/Authorization Code" if you choose to allow Users to make these types of calls without a code.
6. Search by Department, Last Name, or First Name to quickly locate users.
7. Use the Add or Remove buttons to move users to the "Restricted Users" area. Click "Save" to save your changes.
8. In the Codes Management section, enter the code and description for each verified account code users will require. Click "Add" to add the code to your list.
9. Repeat this process to add additional codes.
10. Click "Save."



Calling Plans

Policies

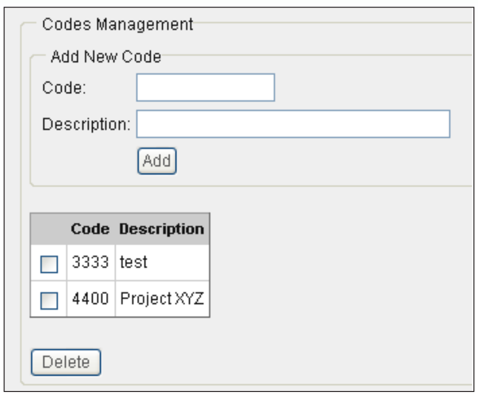
Configure and manage calling plans for members in your Group. Plans allow or block specific call types from being received or placed by all members in the Group, in addition to control over call.

Codes Management

Set up authorization codes that will be required for outgoing call plan policies.

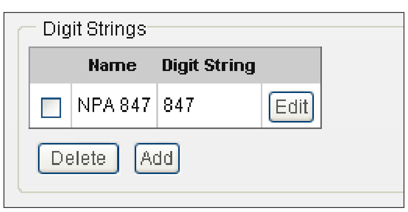
To add a code:
1. Enter the code and description
2. Click Add
3. Proceed with adding each Authorization Code you need to configure

To delete a code:
1. Check the box by the code you wish to delete
2. Click Delete



Digit Strings

If more granularity is required when allowing or blocking calls, digit strings provide an easy solution. Digit strings filter incoming and outgoing calls based on exact digit string patterns, like a 10-digit phone number. You provide a name and enter in the digits exactly as they would be dialed or received.



Transfer Numbers

Use the transfer numbers feature located under the calling plan options menu for a particular call type to automatically transfer to a specific location when dialed.

To program Transfer Numbers:
1. Enter Transfer Numbers
2. Click "Save"

Incoming Calling Plan

You can prevent the following types of calls: Calls From Within Group, Calls From Outside Group, Collect Calls, and call types represented by customizable digit strings the system matches against outside numbers.

> Note: It is recommended that you use the defaults for Incoming Calling Plans.

Outgoing Calling Plan:

1. Review the Outgoing Call Types
2. In the Originating column, select how you want calls to be handled (see Legend)
3. Click "Save"

Example: If you would like to block employees from dialing International numbers, select N for no in the International numbers row from the dropdown menu. Now all International calls will be blocked and Users will hear a recording.

Call Type	Originating	Initiating Call Forwards / Transfers	Description
Group	Y	☑	Calls within the business group
Local	Y	☑	Calls within the local calling area
Toll Free	Y	☑	Calls made to toll free numbers
Toll	Y	☑	Local toll calls
International	T1	☑	International calls
Operator Assisted	Y	☑	Calls made with the chargeable assistance of an operator
Chargeable Directory Assistance	Y	☑	Directory assistance calls
Special Services I	Y	☑	Special Services I (700 Number) calls
Special Services II	Y	☑	Special Services II
Premium Services I	Y	☑	Premium Services I (900 Number) calls
Premium Services II	Y	☑	Premium Services II (976 Number) calls
Casual	Y	☐	1010XXX chargeable calls. Example: 1010321
URL Dialing	Y	☑	Calls from internet
Unknown	Y	☑	Unknown call type
NPA 847 (847)	Y	☑	NPA 847

Legend

Allow:	Y
Block:	N
Authorization code required::	A
Transfer to 1st transfer number:	T1
Transfer to 2nd transfer number:	T2
Transfer to 3rd transfer number:	T3

> Note: While these settings will affect all Users in the Group, individual User calling plans can be modified at the User level. Navigate to that User, click on Calling Features,"All Services," and scroll to Call Plans. Click "Edit" and then click on the "Custom Box." This will allow you to adjust calling plans for a specific User.

Utilities

Most of the Utilities menu selections are view-only or set to default to the best recommended solution. Below is a brief description of each Utility option available.

Item	Description
Policies	View Group Web and Call Processing Policies.
Group CLID	Configure the name and/or number of the Group to display on the caller ID for outgoing calls instead of the User who placed the call.
Inventory Report	Generate and email a report on the resources used within the Group.
Enterprise Directory	At a glance Enterprise Directory in the portal.
Custom Contact Directories	Create a custom contact directory with a subset of members from the Group or Enterprise.
Common Phone List	Store a frequently called numbers list for the Group so they can easily be dialed from the User's CommPilot Call Manager. You can quickly add to the list by importing a phone list from a CSV file.
Disaster Redirect	This allows an admin to update the entire Group's Call Forward Not Reachable setting.
Feature Access Codes	View feature access codes settings from TDS. Alternate codes are optional and are configured by the Enterprise Administrator.

Call Detail Reporting

Enables access to call history reports of users based on specific criteria such as date ranges or types of calls.

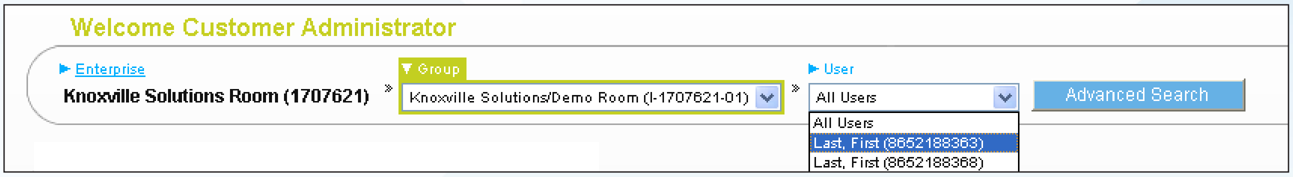
To use this service:
1. Select a user from the User dropdown.
2. Select Sort Options using the Sort By fields.
3. Enter a start and end date in the Date range fields.
4. Select the type of calls to be included in the report by checking the appropriate box(es) (e.g., Inbound, Missed, or Outbound).
5. To search by specific criteria, enter a complete or partial phone number in the text box to and click create report. For example, if you enter "756," all the telephone numbers containing the digits "756" will be included in the report.
6. To email your report, enter an email address and click Submit.
7. To export your report to a PDF or CSV, click the appropriate Submit button.

Note: A maximum of 2,000 records may be displayed on your Web browser, or 5,000 records with a PDF or email report. Excel downloads display all records available. However, this may be limited based on the version of Excel you are using.

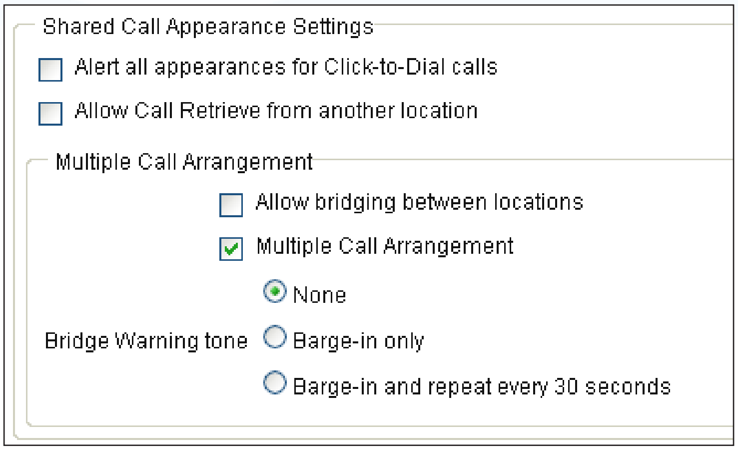
Shared Call Apperances

Shared Call Appearance allows Users to have their number register and appear on multiple devices at the same time.

1. Make note of the telephone's MAC addresses that will display the appearance
2. Log in to the Web portal as an Administrator
3. Select the User associated with the station that will appear on another set from the User dropdown menu



4. Hover over Calling Features, click on "All Services"
5. Scroll down to the Call Control section and click "Edit" next to Shared Call Appearances

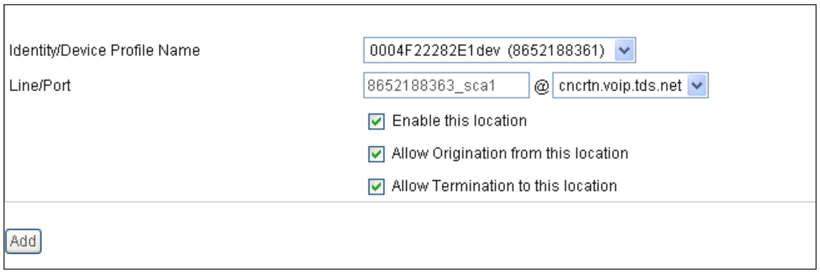


6. It is recommended to leave the Shared Call Appearance settings at the default. Below is a chart explaining each function, if enabled.

Alert all appearances for Click-to-Dial calls	Alerts all stations with Shared Call Appearance by ringing, including the primary phone when the person whose phone number is the shared appearance uses the click-to-dial feature. Any of the stations can pick up and be connected to the number that was clicked to dial.
Allow Call Retrieve from another location	This feature should not be enabled.
Multiple Call Arrangement	Provides the ability for multiple calls to be handled concurrently at different managedIP locations for a User. No single location is considered the active location, so all locations are allowed to originate calls and receive new incoming calls when they have an available call appearance, regardless of the activity at the other locations.
Allow Bridging between locations	Allows for bridging calls between shared call appearance locations to facilitate manager/administrative assistant interactions.
Bridge Warning tone	Alerts all Users on a call with a warning tone indicating that the call has been bridged.

Setting Up Devices the Line Appears On:

1. To add devices click "Add"
2. Use the dropdown associated with "Identity/Device Profile Name:" to find the MAC address for the phone you want this number to appear on
3. Line port: Enter the phone number that is going to appear followed by "-1"
4. Remove the check mark from the following boxes if:
    - Enable this location: You are only using the appearance to monitor when the phone is in use. This will display a solid red light next to the appearance when the phone is in use.
    - Allow Origination from this location: You want to disable the ability to originate calls from the Shared Call Appearance. This also eliminates the ringing and call waiting tones associated with the shared appearances.
    - Allow Termination from this location: You want to disable the ability to terminate calls from the Shared Call Appearance. This also eliminates the ringing and call waiting tones associated with the shared appearances.
5. Click "Save"



Note: When you have added the appearances, you will need to reset the phone displaying an appearance before the numbers will appear. To do so, unplug the telephone and plug it back in.

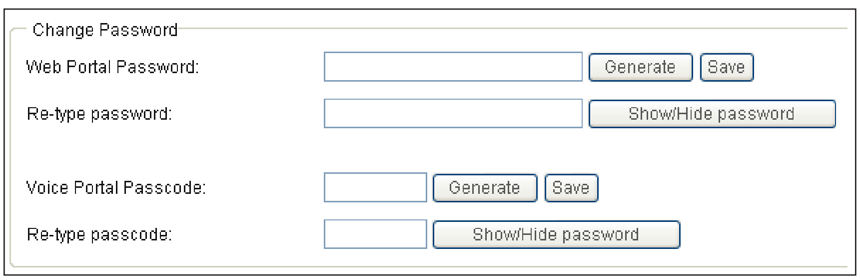
Ongoing Management of Users

Change User Passwords

Users will change and set up their own unique passwords. However, as the Administrator you may need to reset them from time to time if a User gets locked out of the system or leaves the company. Please see page 29 for Passcode Rules.

To change a User's password:

1. Select the User from the dropdown menu
2. At the User Profile screen, click the "Change Password" button
3. Enter a pre-defined password or select the button to auto generate
4. Click "Save"



User Services

The Administrator has access to User services and can—via the Web portal—activate, deactivate, and customize these services. Some of the services an Administrator might update for a User include configuration of Incoming and Outgoing calls, Call Control, Calling Plans, Messaging, and Client Applications.

The User service pages are a good resource when helping a User who is experiencing issues with their service. An Administrator can quickly route to how their services are configured. The services available to Users are dependent on the specific service package purchased for a station.

To Manage User Services:

1. Select the User from the dropdown menu
2. Hover over "Calling Features" and Select "All Services"
3. Update any specific User Features
4. Click "Save"

> Note: As your employees change, it is important that you go into a User's profile and delete any special configurations and reset the passwords for the User.

Uploading a Greeting or Music On Hold

Below is the procedure to record a personal greeting or announcement using a PC. Instructions are provided for the following sound recorders:

- Windows 98 Sound Recorder and Windows XP Sound Recorder
- Windows 2000 Sound Recorder
- Windows NT Sound Recorder

If you are using a different sound recording product, the required format for recordings are:

- CCITT u-Law or A-Law
- 8,000 kHz
- 8-bit mono
- .wav file

To record using the Windows 98 Sound Recorder or Windows XP Sound Recorder:

1. **In Windows 98**, select Start> Programs> Accessories> Multimedia> Sound Recorder from the Windows task bar.
   In Windows XP, select Start> All Programs> Accessories> Entertainment> Sound Recorder.

> Note: It is possible that your Sound Recorder is in a different location, or that your default sound recorder is another product. Please note the required format for your greetings below and follow the instructions for your specific sound recording product.

2. Make the setting selections. Click Properties from the File menu. The properties for Sound window appears.
3. Click Convert Now and then click OK. The Sound Selection page appears.
4. Select CCITT u-Law from the Format list.
5. Select 8,000 kHz, 8-bit mono under Attributes and click OK. You may want to save this format at this point, so that you can easily select it in the future.

6. In the Properties for Sound dialog box, click OK.
7. Click Record on the Sound Recorder. Speaking clearly into your PC microphone, record your message. When you have finished, click Stop. To listen to your message, click Play. If you are not pleased with your message, record it again.
8. When you are satisfied with your message, select Save As from the File menu. Name your sound file, being certain that you remember its location and that the file type is a .wav file.
9. In the File name field, enter the desired name of your recording.
10. Click OK. To exit without saving, click Cancel.

To record using the Windows 2000 Sound Recorder:

1. Start> Programs> Accessories> Multimedia> Sound Recorder from the Windows task bar.

Note: It is possible that your Sound Recorder is in a different location, or that your default sound recorder is another product. Please note the required format for your greetings below and follow the instructions for your specific sound recording product.

2. Click Record on the Sound Recorder. Speaking clearly into your PC microphone, record your message. When you have finished, click Stop. To listen to your message, click Play. If you are not pleased with your message, record it again.
3. Click OK.
4. Click Change to modify the settings. Select CCITT u-Law from the Format list. Select 8,000 kHz, 8-bit mono under Attributes and click OK. You may want to save this format at this point, so that you can easily select it in the future. In the Properties for Sound dialog box, click OK.
5. When you are satisfied with your message, select Save As from the File menu. Name your sound file as .wav file.
6. In the File name field, enter the desired name of your recording.
7. Click OK. To exit without saving, click Cancel.

To record using the Windows NT Sound Recorder:

1. Select Start> Programs> Accessories> Multimedia> Sound Recorder from the Windows task bar.
2. Select Audio Properties from Edit menu. Click on the Customize button under Preferred quality. The Customize dialog box appears.
3. In the dropdown menu under Format, select CCITT u-Law.
4. In dropdown menu under Attributes, select 8.000 kHz, 8-bit mono. You may want to save this format at this point, so that you can easily select it in the future.

5. Click OK in the Customize dialog. Then click OK in the Audio Properties dialog box.
6. Click Record on the Sound Recorder. Speaking clearly into your PC microphone, record your message. When you have finished, click Stop. To listen to your message, click Play. If you are not pleased with your message, record it again.
7. Click OK.
8. When you are satisfied with your message, select Save As from the File menu. Name your sound file as .wav file.
9. In the File name field, enter the desired name of your recording.
10. Click OK. To exit without saving, click Cancel.

Passcode Rules

Voice Messaging

- Cannot be a single repeated digit
- Cannot be or contain the user's own extension or phone number
- Cannot be the reverse of the user's extension or phone number
- Cannot be the old passcode
- Cannot be the reverse of the old passcode
- Cannot be sequential digits in either increasing or decreasing order
- Cannot be repeating sequences (e.g., 123123, 242424, 43214321)
- Must be at least 5 digits, no more than 8 digits
- Expires after 365 days
- Disabled after 5 failed login attempts

Web Portal

- Cannot contain your login ID
- Cannot be your old password
- Must contain at least 1 number, 1 uppercase and 2 lowercase alpha characters.
- Cannot be the reverse of an old passcode
- Must be a minimum of 8 characters
- Expires after 180 days
- Disabled after 5 failed login attempts

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Note: Tags shown in the web portal are based on the phone model being modified. With the IP650, all tags associated to a line key will appear with 34 options. Lines 7-34 are only applicable if the phone is equipped with an expansion module.

Item	Tag	Description	Default	Options	Supported Devices
1	DIRECTORY_CONTACT_NAME_ON_CALLERID	This allows for calls made to or received from contacts in your directory to appear as entered. For example, if Jon from ABC Company is entered as a contact in your phone directory, the Caller ID will Display exactly as it was entered in the directory versus how it is set-up with the phone company for Caller ID.	0 (off)	0 = Off 1 = On	IP650, IP560/550, IP450, IP33X
2	CALL_FORWARD_SOFT_KEY	If enabled, the "Forward" soft key will be displayed and allows the user to update Call Forward Always, Call Forward No Answer, and Call Forward Busy, directly from the phone. Updates made via the phone will also be updated in the toolbar and web portal	0 (off)	0 = Off 1 = On	IP650, IP560/550, IP450
3	TEXT_LABEL_FOR_LINEKEY_<x> (x= 1-34)	This allows for display labels to be customized for shared call appearances or secondary numbers to display a name versus a number. For example, if 608-555-1213 is the number displayed on a phone, this feature will allow a name to be displayed instead. *Note: This feature is applicable to each individual line key that appears on a phone up to a maximum of 34 lines with phones that have an expansion module*	<null>	<null> = Line Port appears (e.g., 6085551212 or if SCA, 6085551212_SCA_1) <text> = <text value> (e.g., "555-1212", "Jane Doe", "TDS Telecom")	IP650, IP560/550

Item	Tag	Description	Default	Options	Supported Devices
4	DATE_TIME_IN_24_HOUR_FORMAT	Display time in 24-hour "military time" or choose standard AM / PM format.	0 (12 hr)	0 = 12 hour clock i.e. AM/PM 1 = 24 hour clock i.e. 15:30	IP650, IP560/550, IP450, IP33X
5	CALL_WAITING_TONE	Specifies the tone heard on an incoming call when another call is active (i.e., call waiting).	beep	beep = brief "beep" ring = normal ring tone silent = no tone or ringing	IP650, IP560/550, IP450, IP33X
6	HANDSFREE_SPEAKER-PHONE_ENABLED	Allows the speakerphone function to be disabled. When the phone is disabled: • The phone will display the message "Hands free mode disabled" when a user depresses the speakerphone key • Click-to-dial calls will revert to the handset or headset	1 (enabled)	0 = Disable 1 = Enable	IP650, IP560/550, IP450, IP33X
7	HOLD_RECALL_ENABLED	"Hold Recall" provides periodic notification to the user that call(s) have been on hold for an extended period of time.	0 (off)	0 = Off 1 = On	IP650, IP560/550, IP450, IP33X
	HOLD_RECALL_INITIAL_TIMER	Time (in seconds) to wait before an initial reminder is provided for a call on hold.	90 (secs)	<seconds>	IP650, IP560/550, IP450, IP33X
	HOLD_RECALL_SUBSEQUENT_TIMER	Time (in seconds) to wait after the initial timer that subsequent reminders are provided for a call on hold.	60 (secs)	<seconds>	IP650, IP560/550, IP450, IP33X

Item	Tag	Description	Default	Options	Supported Devices
8	CALL_CENTER_SOFT_KEYS	For Call Center agents, this option adds soft keys to phone enabling agent to Sign In/Out, and change state (Available / Unavailable).	0 (no soft keys)	0 = No soft keys 1 = CC soft keys	IP650, IP560/550, IP450, IP33X
	CALL_CENTER_AGENT_LINE_KEY	The key used to support the Call Center agent sign-in function (special icons used), interworks with Call Center soft keys.	1 (key)	1 – 34 <line key>	IP650, IP560/550, IP450, IP33X
	CALL_CENTER_AGENT_SIGN_IN_STATE	The state of the Call Center User when signing in to the Call Center queue.	1 (available)	0 = Unavailable 1 = Available	IP650, IP560/550, IP450, IP33X
9	MWI_ENABLED_FOR_LINE_KEY_<x> (x= 1-34)	The Message Waiting Indicators, both the red LED light at the top of the phone and the envelope icon next to the line key may be disabled on a per line key basis. *Note: If enabled on a single line key, the MESSAGES key will go directly to Voice Messaging. If enabled for 2+ line keys, the MESSAGES key will present a "Line Select" menu, prompting the user to select the line key they desire to retrieve messages.*	Registration (enabled)	Registration = On <null> or disabled = Off	IP650, IP560/550, IP450, IP33X
10	MISSED_CALLS_LIST_AND_COUNTER_ENABLED	When enabled, missed calls will increment the "Missed Calls" counter on the display and the missed calls will be logged in the "Missed Calls List".	1 (Line Key 1) 0 (Line Keys 2 -34)	0 = Off (does not log) 1 = On	IP650, IP560/550, IP450, IP33X

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Item	Tag	Description	Default	Options	Supported Devices
11	HOTLINE_ENABLED_FOR_LINE_KEY_<x>	When enabled, a call will be automatically placed to the "Hotline Number", which can be set by completing Tag X.	0 (disabled)	0 = Disabled 1 = Enabled	IP650, IP560/550, IP450, IP33X
	HOTLINE_NUMBER_DIALED_FOR_LINE_KEY_<x>	You first must enable this feature to set a predefined number to be automatically dialed. See Tag X to enable this function.	<null>	<DN> (any valid internal or external telephone number that can be dialed directly from the station)	IP650, IP560/550, IP450, IP33X
12	CALLER_ID_NUMBER_BEFORE_NAME	When activated, the phone will display the Caller ID number before the Caller ID Name.	0 (name first)	0 = Off (name first) 1 = On (number first)	IP650, IP560/550, IP450, IP33X
13	FORCED_LINE_SELECTION	When activated, user must press the line key button to answer an incoming call.	0 (off)	0 = Off	IP650, IP560/550, IP450, IP33X