



# OfficeSuite Administrator Quick Reference Guide Release 4.1

This reference guide describes common administrative tasks on a tenant site. See the Administrator Reference Guide for general information and task option details.

## Logging into the administrator interface

- 1 Open your Web browser (minimum Internet Explorer 6.0 or Firefox 1.5.0.4).
- 2 Enter the URL for the web administration interface <http://officesuite.broadviewnet.com/?tenant=/>. The Login screen appears.
- 3 Enter your extension and PIN
- 4 The Web page displays your personal settings, directories, and the company settings.
- 5 Select **Company Settings** on the menu frame to view the administrative actions available to you.

You can reach the administrator work areas in one of two ways: by the Menu options or by the categories of options in the Main frame. The example below shows the Main frame options that appear when you select **Company Settings** in the left Menu.

### Menu

### Main frame

<ul style="list-style-type: none"> <li>▾ My Settings             <ul style="list-style-type: none"> <li>- My Personal Details</li> <li>- My Phone</li> <li>- My Call Coverage</li> <li>- My Call Groups</li> </ul> </li> <li>▾ Company Directories             <ul style="list-style-type: none"> <li>- Internal Directory</li> <li>- External Directory</li> <li>▾ <b>Company Settings</b> <ul style="list-style-type: none"> <li>- Users and Locations</li> <li>- Profiles</li> <li>- External Directory / Speed Dials</li> <li>- Call Groups</li> <li>- Auto Attendant</li> <li>- Incoming Call Routing</li> <li>- Business Details</li> <li>- Phone Inventory</li> </ul> </li> </ul> </li> </ul>	<div style="border: 1px solid #ccc; padding: 5px;"> <p><b>Company Settings</b></p> <p>Use these web pages to manage the users, features, and services associated with your company's phone system. Select a task from the list below or from the menu on the left.</p> <p>To obtain context-specific help in any section select the  icon or select <b>Help</b> in the top right corner of any page.</p> <table border="0" style="width: 100%;"> <tr> <td style="vertical-align: top; width: 33%;"> <p><b>Users and Locations</b></p> <ul style="list-style-type: none"> <li> <a href="#">View, edit, delete, copy, disable a user/location</a></li> <li> <a href="#">Add a user</a></li> <li> <a href="#">Add a location</a></li> </ul> <p><b>Call Groups</b></p> <ul style="list-style-type: none"> <li> <a href="#">View, edit, delete call groups</a></li> <li> <a href="#">Add a broadcast group</a></li> <li> <a href="#">Add a hunt group</a></li> <li> <a href="#">Add a Monitor group</a></li> <li> <a href="#">Add a rollover group</a></li> </ul> </td> <td style="vertical-align: top; width: 33%;"> <p><b>Profiles</b></p> <ul style="list-style-type: none"> <li> <a href="#">View, edit, delete profiles</a></li> <li> <a href="#">Add a phone key profile</a></li> <li> <a href="#">Add a call permission profile</a></li> </ul> <p><b>Phone Inventory</b></p> <ul style="list-style-type: none"> <li> <a href="#">View, edit, delete phones</a></li> </ul> </td> <td style="vertical-align: top; width: 33%;"> <p><b>External Directory / Speed Dials</b></p> <ul style="list-style-type: none"> <li> <a href="#">View, edit, delete external directory (speed dial) entries</a></li> <li> <a href="#">Add a company speed dial</a></li> </ul> <p><b>General</b></p> <ul style="list-style-type: none"> <li> <a href="#">View and edit business details</a></li> <li> <a href="#">View and edit routing details</a></li> <li> <a href="#">View and edit auto attendants</a></li> </ul> </td> </tr> </table> </div>	<p><b>Users and Locations</b></p> <ul style="list-style-type: none"> <li> <a href="#">View, edit, delete, copy, disable a user/location</a></li> <li> <a href="#">Add a user</a></li> <li> <a href="#">Add a location</a></li> </ul> <p><b>Call Groups</b></p> <ul style="list-style-type: none"> <li> <a href="#">View, edit, delete call groups</a></li> <li> <a href="#">Add a broadcast group</a></li> <li> <a href="#">Add a hunt group</a></li> <li> <a href="#">Add a Monitor group</a></li> <li> <a href="#">Add a rollover group</a></li> </ul>	<p><b>Profiles</b></p> <ul style="list-style-type: none"> <li> <a href="#">View, edit, delete profiles</a></li> <li> <a href="#">Add a phone key profile</a></li> <li> <a href="#">Add a call permission profile</a></li> </ul> <p><b>Phone Inventory</b></p> <ul style="list-style-type: none"> <li> <a href="#">View, edit, delete phones</a></li> </ul>	<p><b>External Directory / Speed Dials</b></p> <ul style="list-style-type: none"> <li> <a href="#">View, edit, delete external directory (speed dial) entries</a></li> <li> <a href="#">Add a company speed dial</a></li> </ul> <p><b>General</b></p> <ul style="list-style-type: none"> <li> <a href="#">View and edit business details</a></li> <li> <a href="#">View and edit routing details</a></li> <li> <a href="#">View and edit auto attendants</a></li> </ul>
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## Users and locations

*Users and Locations > Add a user and Add a location*

Add users or locations for your business and configure some services and profiles.

- Enter general information—name, number, email
- Enter **Phone Information**—extension, language setting, outgoing calling ID, enable Handsfree Answerback
- Enable services such as
  - Dialing from Auto Attendant (by extension or name directories)
  - Twinning
  - Voice mail
- Check **Administrator Privileges** if you want to give the user the ability to perform tenant administration tasks, such as adding users, adding profiles, etc.
- Set phone key and permission profile
- For a new user or location, plug in and log into a phone.

 **Note**—You can also modify an existing user or location by clicking *View, edit, delete, disable a user/location*.

## Permission profiles

*Profiles > Add a call permission profile*

Add/assign/modify outbound call permissions to users. You create the set of permissions (the profile) and add users to the profile membership.

- **Call Type**—Set the permission for a type of call for the company's business hours (set in Business Details).
- **Other**—Route inbound calls to external numbers and select long distance or service providers.
- **Membership**—Add users to the permission profile

## Call Groups

*Call Groups > Add a broadcast group or Add a hunt group or Add a Monitor group or Add a rollover group or Add Call Pickup group*

Add/modify a calling group for the following group types:

- **Broadcast group**—Calls are routed to all members of this group; all phones can ring or only those not in use
- **Call Pickup group** - Calls to any member of the group can be picked up by any other member of the group.
- **Hunt group**—Calls to a linear hunt group are routed to each group member in turn, and always start with the first member listed; calls to a circular hunt group are routed in the same way, but the starting member role rotates among members
- **Monitor group**—Members (secondary) can monitor calls of another member (primary)
- **Rollover group**—A call rings the phones of a rollover group one at a time until the call is answered or sent to call coverage

**Call group coverage**—Specify coverage if none of the group members answers the call. Select **Call group** Menu option, click the group name, and edit the **Call Coverage** section.

## Business details

*General > View and edit business details*

Specify business details, including setting your company's business hours, extension, hold announcements, and account codes that can associate outgoing and inbound calls to particular clients or accounts.

- **Business hours**—View and set your operating hours, lunch, and special hours for each business day.
- **Extension Management**—View minimum and maximum numbers in extension ranges for users, locations, call groups, and auto attendants
- **Hold announcement**—Select a hold announcement from your service provider. Consult your service provider about customized announcements.
- **Account codes**—Enable/disable minimum and maximum account codes lengths

## Auto attendants

*General > View and edit auto attendants*

Add/modify auto attendants for your business with time of day greetings. You can also access the auto attendant configuration options from this page and add auto attendant menus and sub-menus. You can use default or custom recorded greetings.

- **General information**—Enter name, extension, default language
- **Time of Day Greeting**—Choose Morning, Afternoon, Evening greetings (optional)
- **Main Menu link**—Click to view the auto attendant options page

## Incoming call routing

*General > View and edit routing details*

Define which phone or group of phones or auto attendant will ring when there is a call to your Direct Inward Dial numbers. You can also apply an emergency override.

- **Emergency Override Routing** section—Enable this option to route calls to another number (auto attendant, calling group, user or location, other number) overriding the Time of Day Routing.
- **Time of Day Routing** section—Select a destination (auto attendant, calling group, user or location) to which calls to your Direct Inward Dial (DID) numbers are routed according to Open, Closed, Lunch, and Special times of day (set in Business Details).