

Hosted UC

System Administrator Guide

cbts



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build



transform



support

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Product Overview

This System Administrator Guide is designed to provide a concise overview of the most frequently utilized Hosted UC features. Each section contains a feature overview, reference sheet, and step-by-step instructions.

Day 2 Support Resources

Primary Hosted UC Support:

888-638-1699

Option 1 - Technical Support

Option 2 - Other Options

Please have the following information available when contacting CBTS for support:

Account Number(s):	
BTN (Billing Telephone Number):	
Billing / Service Address:	
Notes:	

Note: CBTS is responsible for the management, monitoring and repair of the network core infrastructure, network connectivity, and CBTS equipment deployed at the customer premise. Adds, changes, or moves requested after install through CBTS Customer Care may be charged as a fee.

Additional Services Support

If you have additional services with Cincinnati Bell, such as FiOptics, Circuits, Analog (POTS) lines, or other services, please call the number below for support...

Cincinnati Bell Support (FiOptics, Analog/POTS lines): 513-566-1611

Program Your Auto Attendant

Below are detailed instructions on how to modify the greeting portion of your Auto Attendant (AA). The extensions, passwords, and available Auto Attendants are listed below.

- Press MESSAGES Key and then the CONNECT soft key on your Hosted UC phone.
 - If you are calling from an external location, dial your Voice Portal Number: _____.
- Press the * key.
- When prompted for the Mailbox ID, enter the extension of your Voice Portal Number: _____.
- Enter your passcode followed by the # key: _____.
- Press 1 to change an Auto Attendant Greeting.
- If you have more than one Auto Attendant, enter the extension of the Auto Attendant you are changing.
- Press 1 to change the Business Hours Greeting.
- Press 2 to change the After Hours Greeting.

Multiple Auto Attendants

AA Name	AA Number

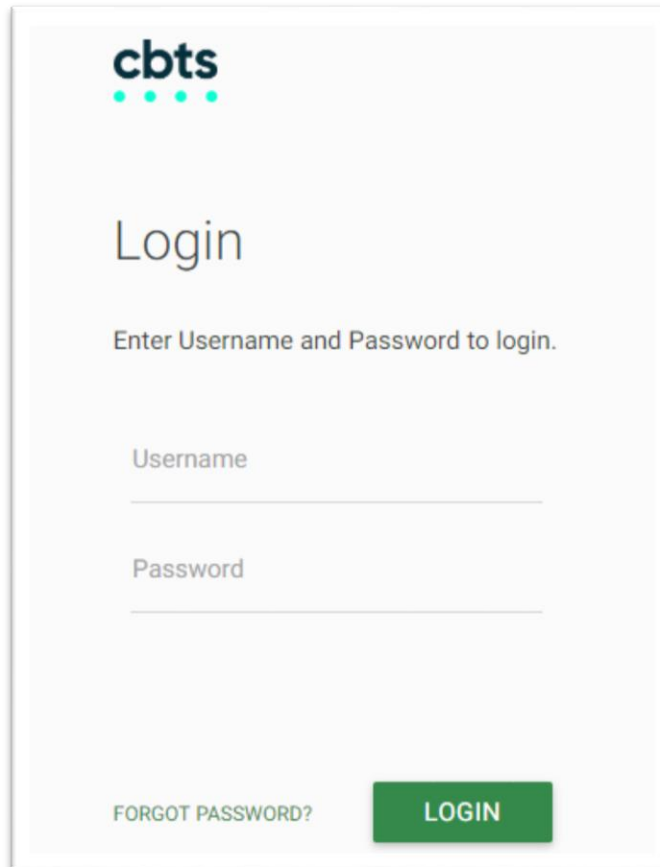
Your Auto Attendant Menu

Business Hours Options	After Hours Options
0	0
1	1
2	2
3	3
4	4
5	5
6	6
7	7
8	8
9	9
*	*
#	#

Administrative Portal

The Administrative Portal of your CBTS Hosted UC system may be modified to suit the needs of your organization. Common changes include call flow, password, voicemail, and employee name changes.

Administrative Website: <https://portal.evolve.cbts.net/auth/login>



cbts

Login

Enter Username and Password to login.

Username

Password

[FORGOT PASSWORD?](#) **LOGIN**

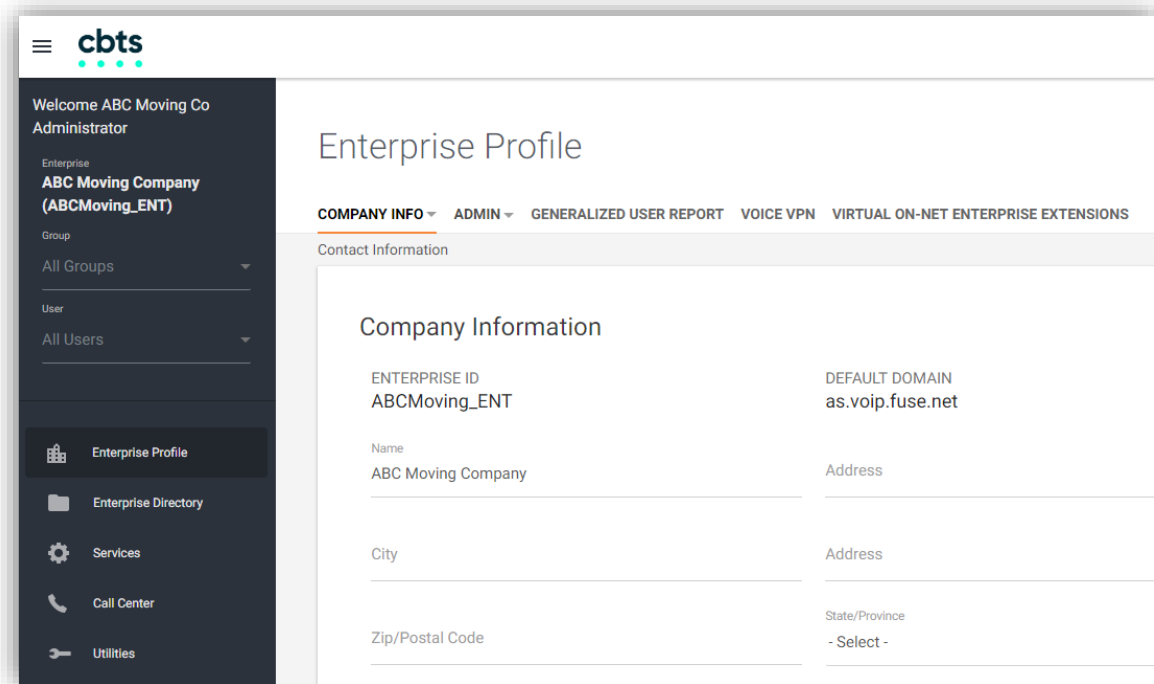
Username: _____

Password: _____

NOTE: You may be prompted to change your password upon initial login.

Main Dashboard

Once you are logged in to the Administrator portal you will be taken to the Main Dashboard at the Enterprise level.

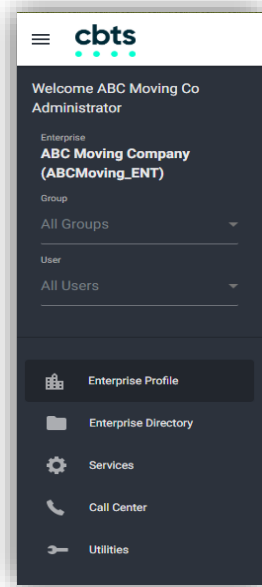


On the left panel you will see your Enterprise, Group and Users. If there are multiple in each category you will see drop-down arrows where you can select a different one. Functionality in the portal will change based on the level you are on (**Enterprise, Group or User**).

When no group or user is selected you are on the Enterprise level as shown below. When you select a group within the Enterprise you will be in the Group level. When you select a user within that Group you will be in the User level. In each level the options below will change.

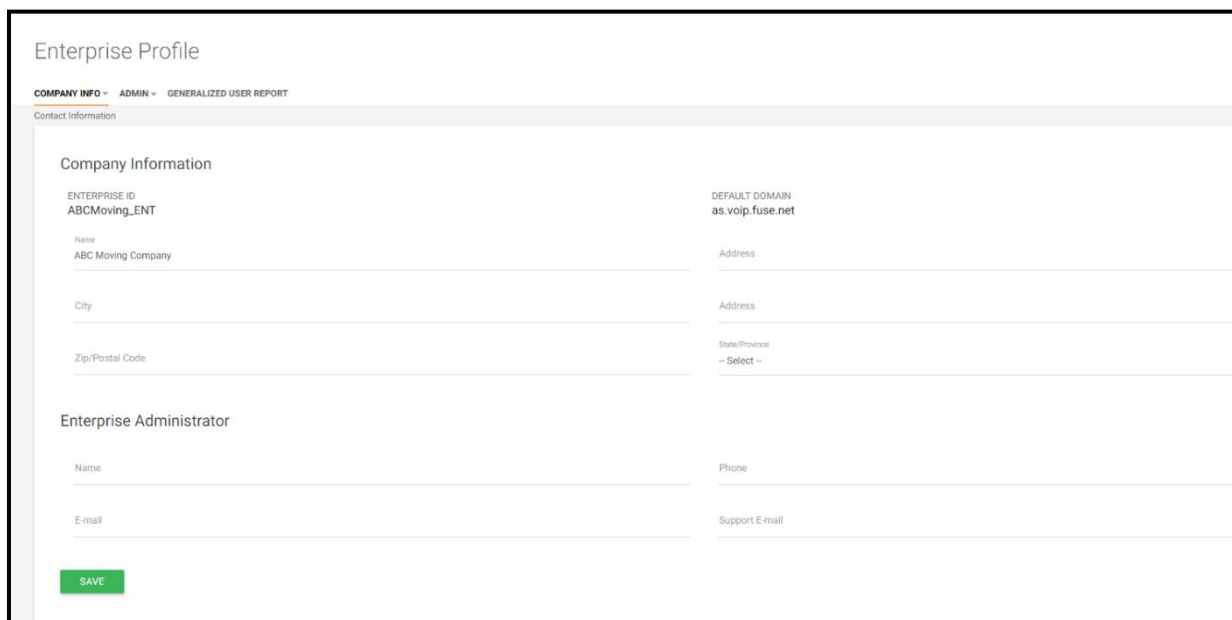
Enterprise Level

At the Enterprise level you will see details regarding your entire Enterprise.

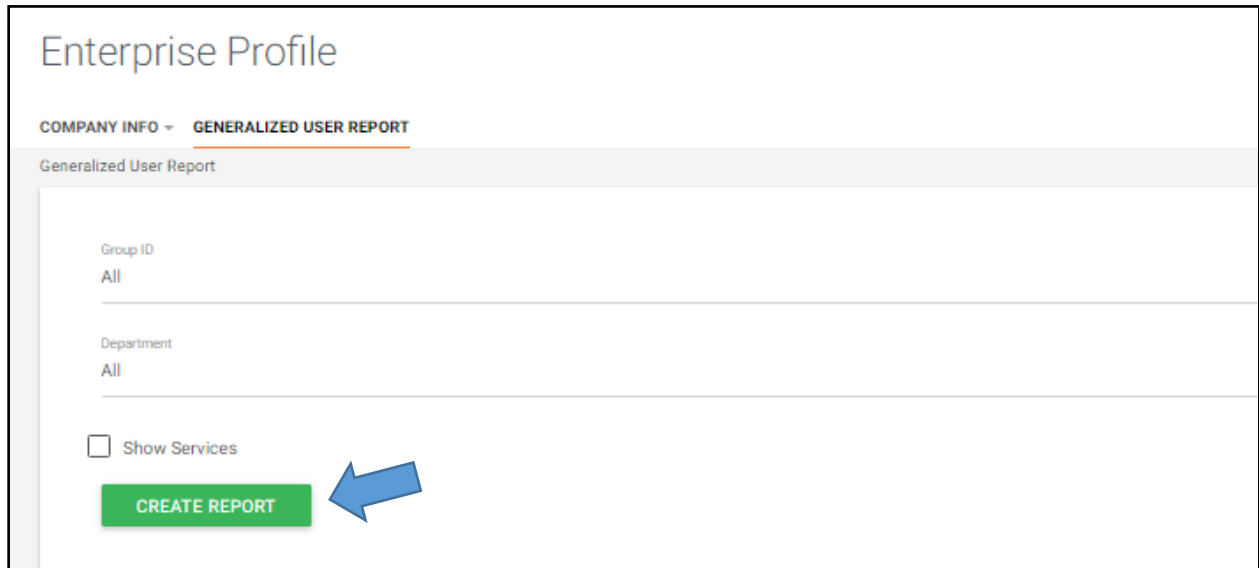


Enterprise Profile

Within the Enterprise Profile, edits may be made to your Company's Information and Enterprise Administrator. To make changes simply type in the new information and click "Save."

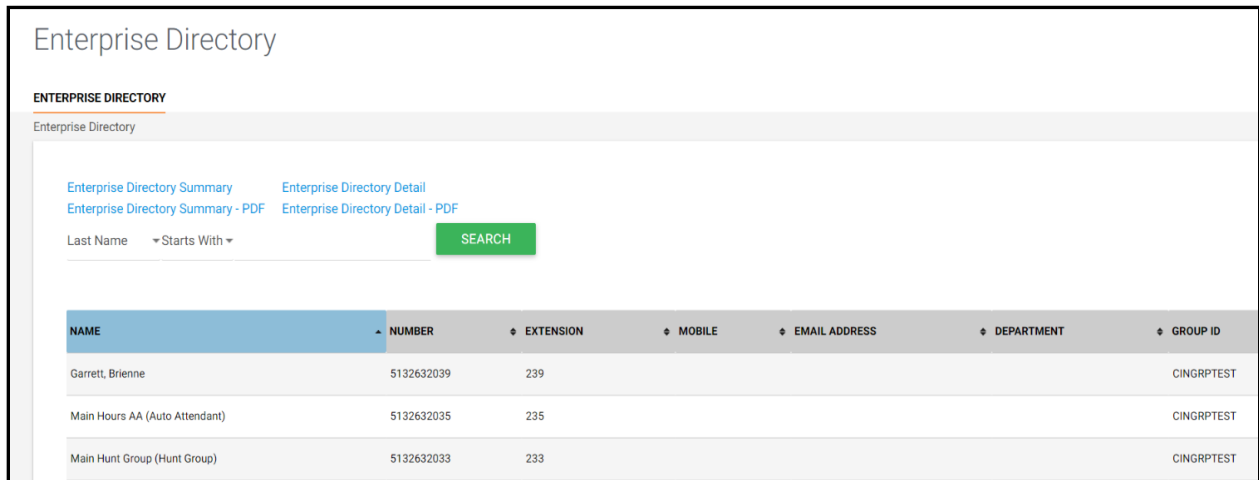


You are also able to create User Reports for the Enterprise by clicking on “Generalized User Reports.” A report can then be created by selecting the Group, Department and clicking “Create Report.”



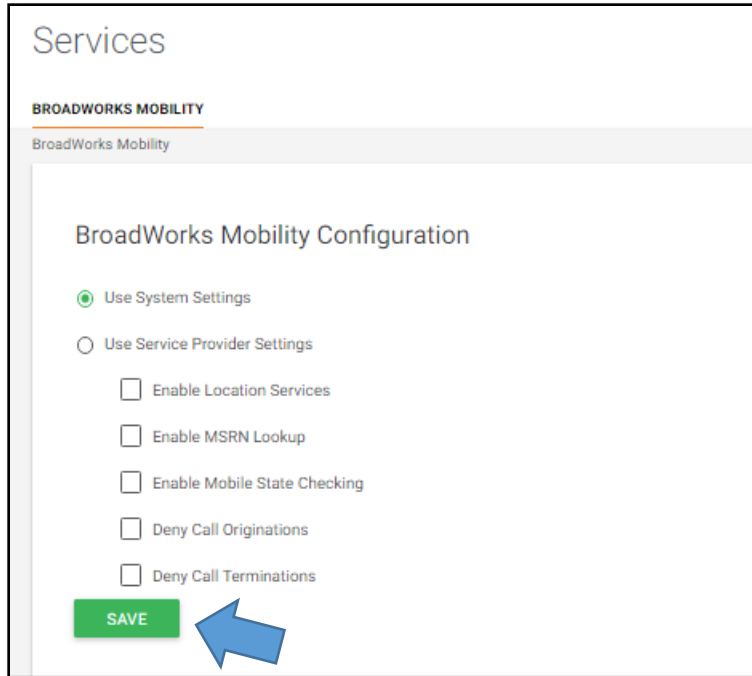
Enterprise Directory

The Enterprise Directory provides a listing of all user telephone numbers, extensions, email addresses, department and group ids if applicable. There is search by name functionality. Directory summaries and details can be exported.



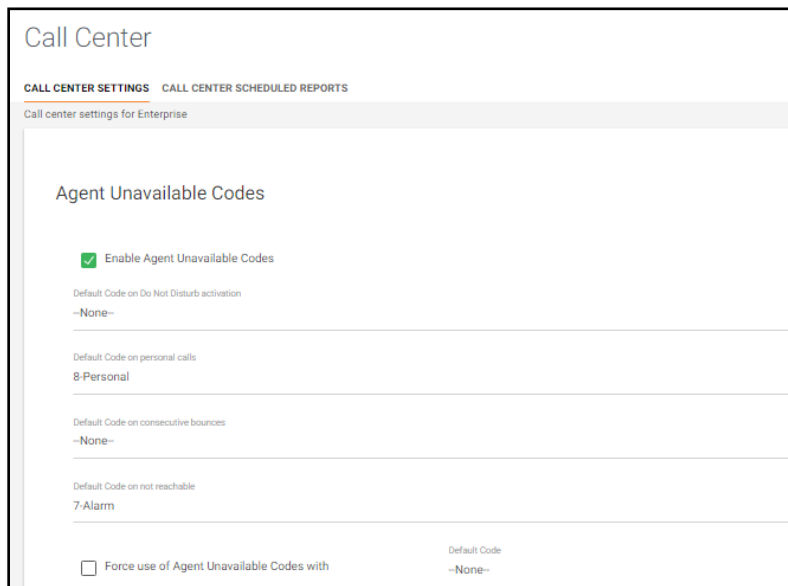
Services

The Services Tab allows the System Administrator to change from system settings to various service provider settings. To change the setting simply click the appropriate radio button and check box, then click “SAVE.”

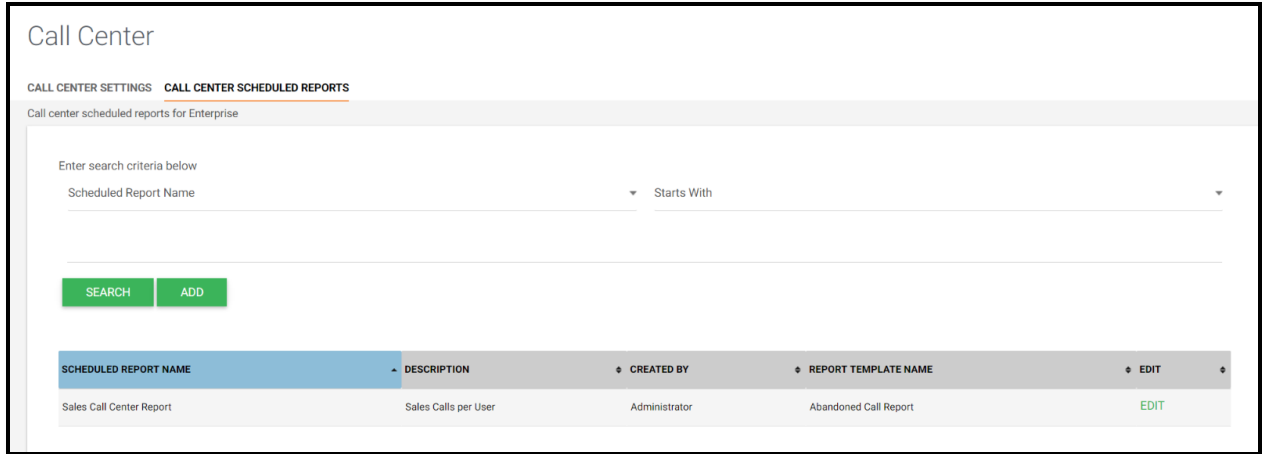


Call Center

The Call Center Tab shows settings if a Call Center is present. Here the System Administrator will have the ability to change disposition codes, settings, routing policies, etc. To make changes you would simply check the appropriate box or radio button and then click “SAVE.”



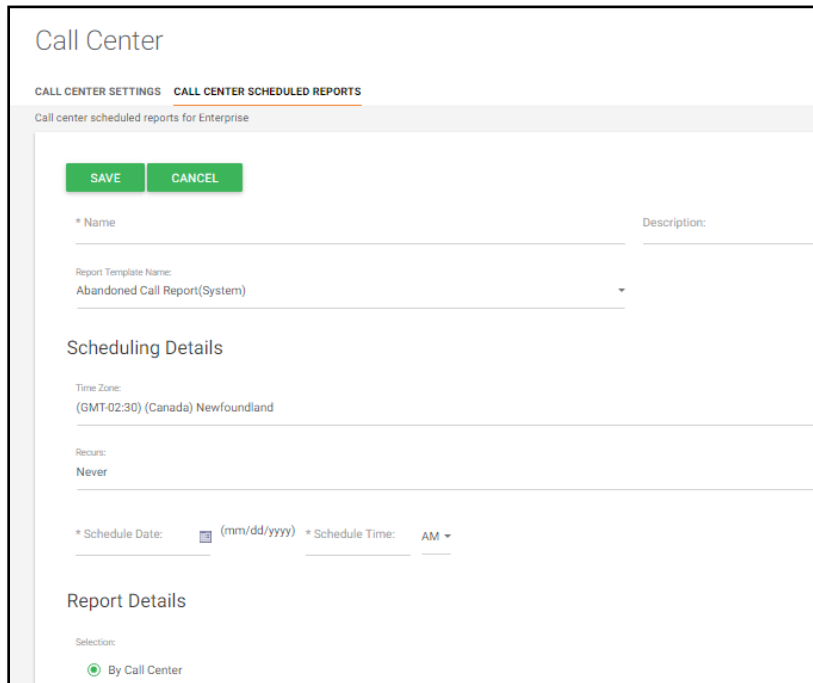
Call Center Scheduled Reports are also available in the Call Center tab. You have the ability to search existing reports that are listed.



You have the ability to create new reports by clicking “ADD.”

There are several options of Report Templates that can be created including abandoned calls, agent activity, disposition codes, overflow, etc.

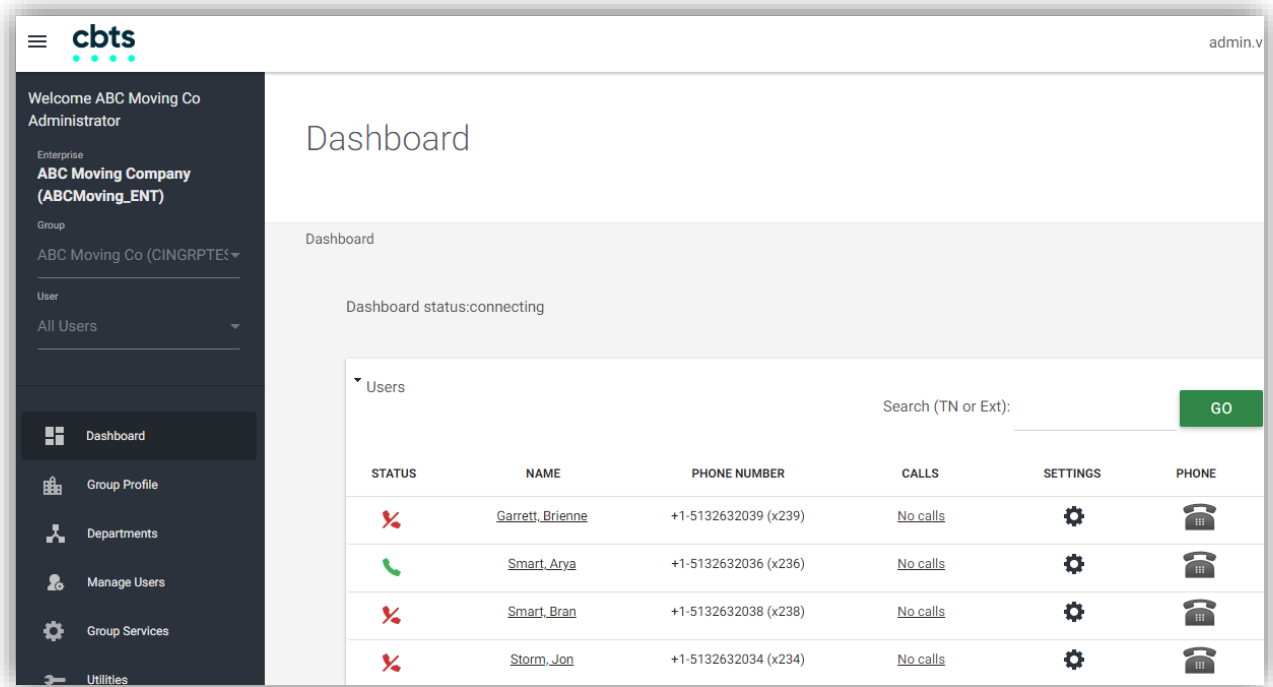
The System Administrator will enter the report details and the click “SAVE” to schedule the report.



Group Level

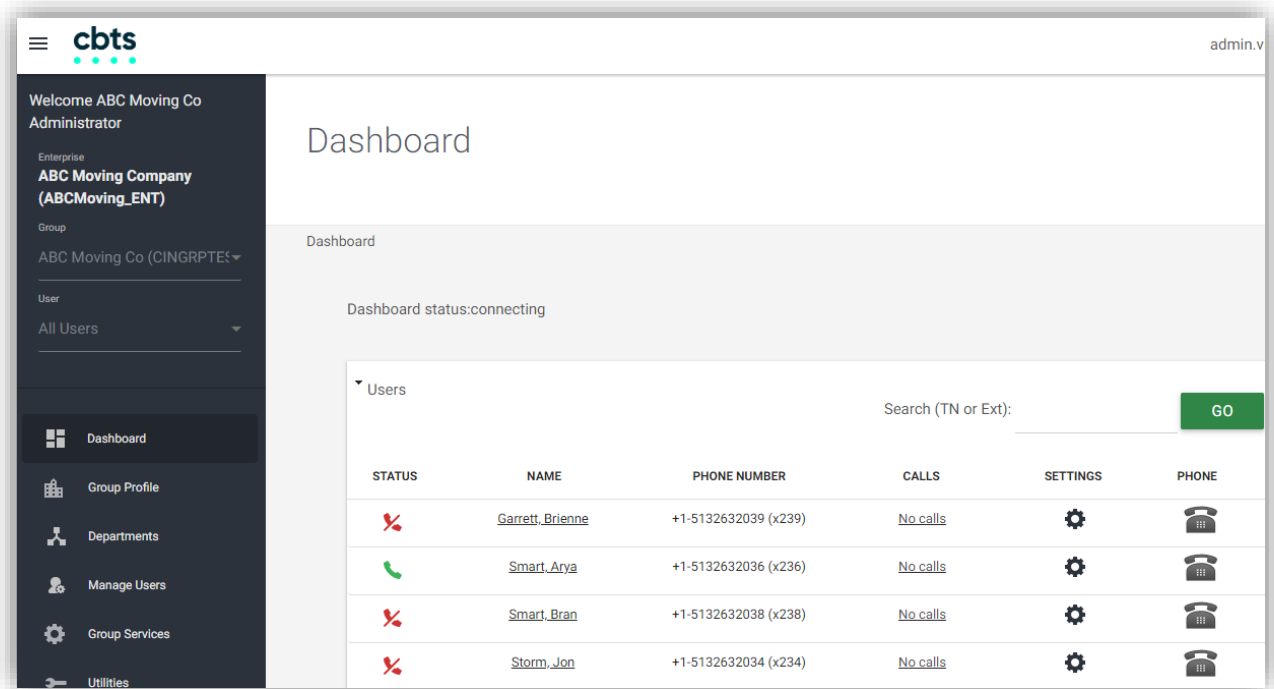
Once the Group is selected the System Administrator will be in the Group Level of the portal. This is where information can be located and changes can be made to a particular group. The Group Level generally indicates a specific location or address. If there are several company locations, they will be separated by Groups.

There are various tabs that run along the left hand pane of the window similar to the view of at the Administrator Level.

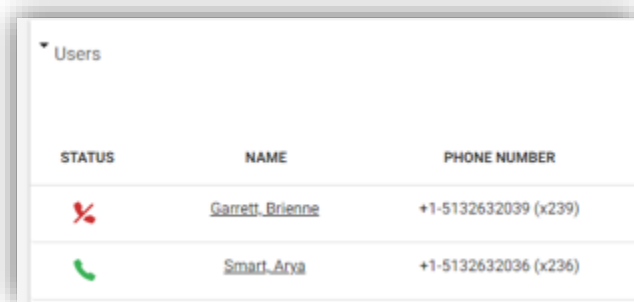


Dashboard

The Dashboard Tab will show all users including Individuals, Auto Attendants, Call Centers, and Hunt Groups. There you will be able to search by telephone number or extension.



At the User level you will be able to see the status of the user either Active (green) or Inactive (red).



Password Reset

Here you have the ability to click on a User's name and reset their web password or voicemail passcode. Simply type in a new password or click "Generate" to have a random password entered. Click "Save."

Name	Web Password	Voicemail Passcode
Last Name 12th floor	New password	New passcode
First Name Conf Room C	Confirm password	Confirm passcode
	SHOW/HIDE GENERATE	SHOW/HIDE GENERATE
<div style="display: flex; justify-content: space-between;"> SAVE CANCEL </div>		

User Calls

In the "Calls" column you will see either "Calls" or no "Calls" which indicates if there is any recent call activity at the User level.

If there is call activity and you click on it, you will see the call detail as shown below.

STATUS	NAME	PHONE NUMBER	CALLS	SETTINGS
	<u>Cover Legal</u>	5133976920 (x76920)		
	#	DATE AND TIME	TYPE	
	+15133976457	8/1 1:06PM	outbound	
	+17204493184	8/1 1:05PM	inbound	
	+15134191020	8/1 1:04PM	inbound	
				VIEW CALL DETAILS

User Settings

In the "Settings" column at the User level, click on the wheel to see what features the User has assigned and if they are active or not-active. You can turn settings off and on using the radio buttons. When you are finished making changes click "Save."

STATUS	NAME	PHONE NUMBER	CALLS	SETTINGS	PHONE
	Garrett, Brienne	5132632039 (x239)	No calls		

Call Forwarding Always

On Off

Call Forwarding Busy

On Off

Call Forwarding No Answer

On Off

Do Not Disturb

On Off

SAVE
CANCEL

[VIEW ALL SERVICES](#)

Group Profile

On the Group Profile Tab you will see profile information for the particular site. To make changes simply type in the new information and click "Save." Time and Holiday schedules can be entered here for the Group Level.

Group Profile

[SITE INFO](#) [TIME SCHEDULES](#) [HOLIDAY SCHEDULE](#)

Location Info

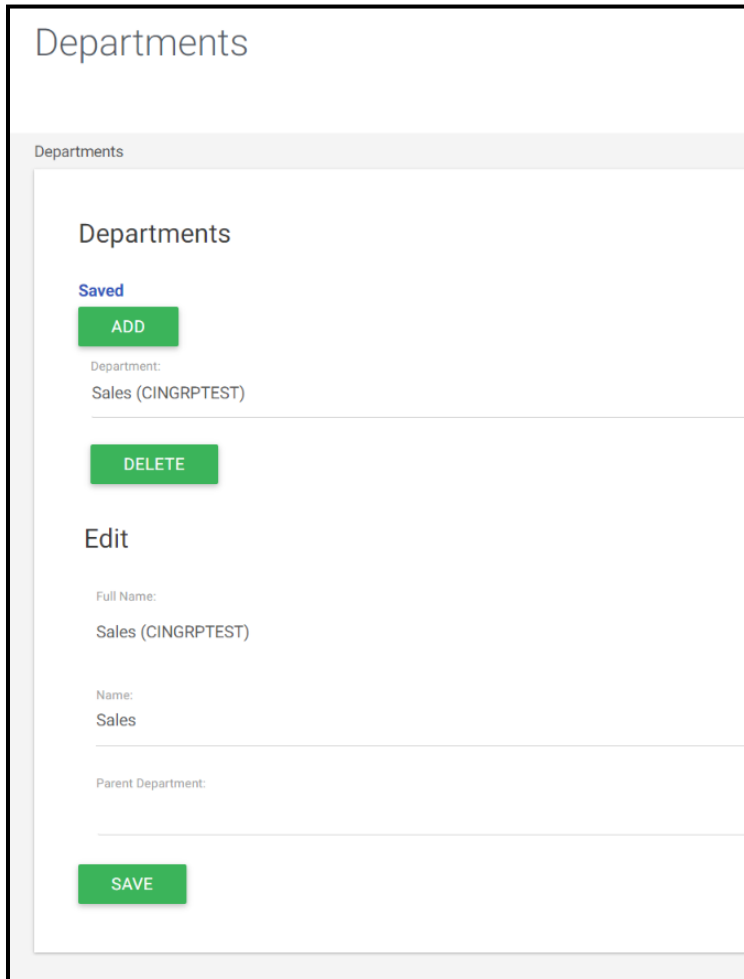
Group Profile

Group Information

Group ID: CINGRPTST	Current Number of Users: 4	Default Domain: as.voip.fuse.net
Group Name: ABC Moving Co		
Address: 123 Main Street		
Time Zone: (GMT-04:00) (US) Eastern Time		
City: Anytown	State: Ohio	Zip Code:

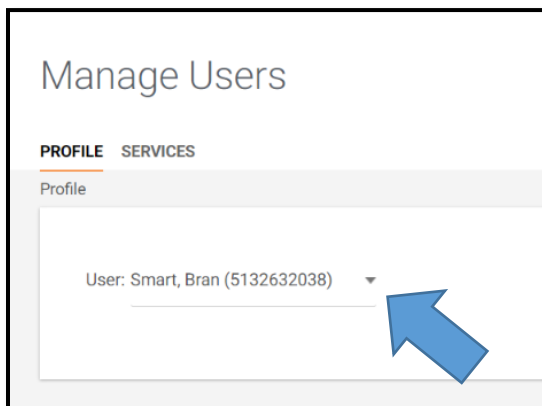
Departments

The Departments Tab is where Departments may be added, deleted or edited.



Manage Users

In the Manage Users tab, System Administrators can quickly locate a User using the drop arrow.

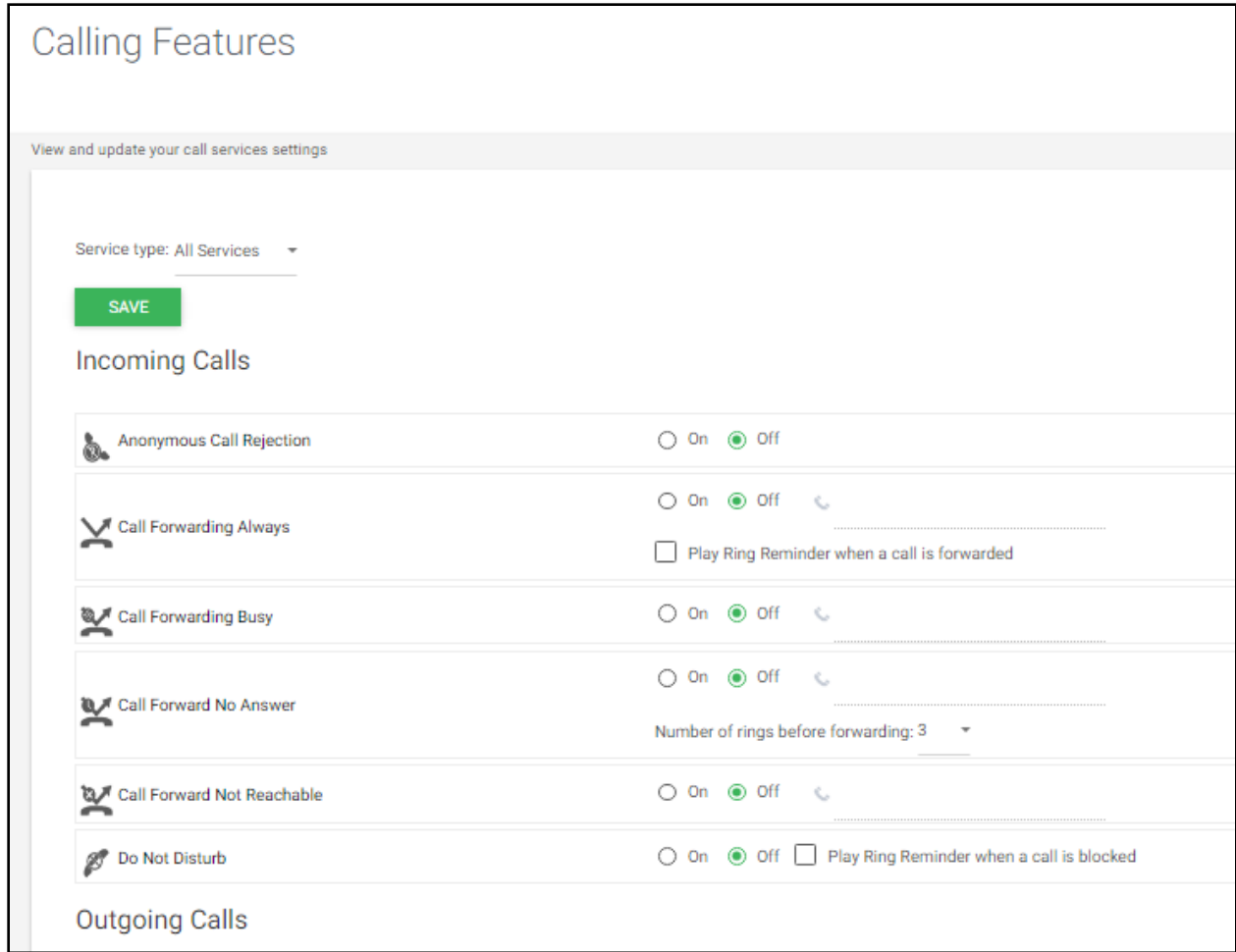


When a particular User is selected you will be taken to the User Profile where details on the User are provided as well as some updates may be made, including password resets.

The screenshot shows a web interface for a user profile. At the top left is the title 'Profile'. Below it is a 'Profile' header bar. A green 'SAVE' button is positioned at the top left of the main content area. Below the button is a red asterisk followed by the text '* indicates required field.'. The main section is titled 'User Info' and contains the following fields:

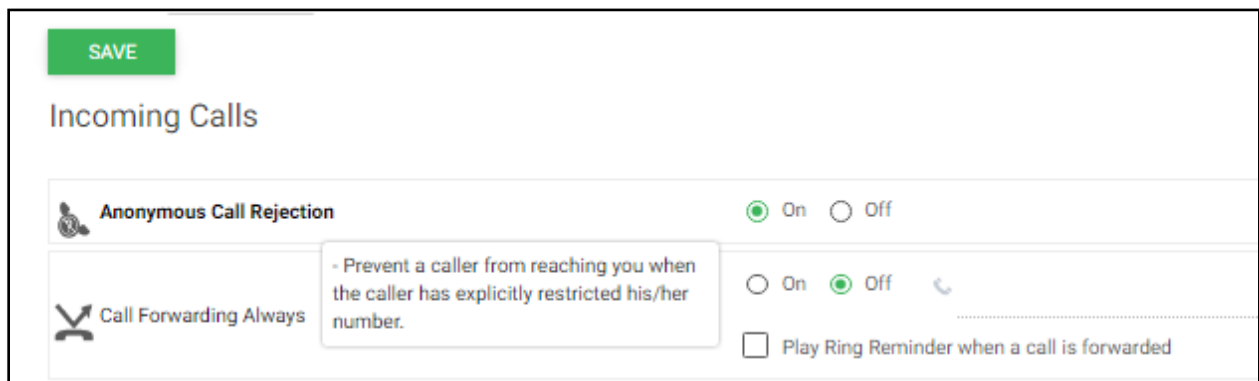
Enterprise ID:	ABCMoving_ENT
Group ID:	CINGRPTTEST
User ID:	5132632038@as.voip.fuse.net
* Last Name:	Smart
* First Name:	Bran
* Calling Line ID Last Name:	Smart
* Calling Line ID First Name:	Bran
Calling Line ID Phone Number:	5132632038
Department:	None
Language:	English
Time Zone:	(GMT-04:00) (US) Eastern Time

On the Services tab you will see what Calling Features the User has assigned to them and if they are on or off.



To activate a feature simply click the “On” radio button and click “SAVE.”

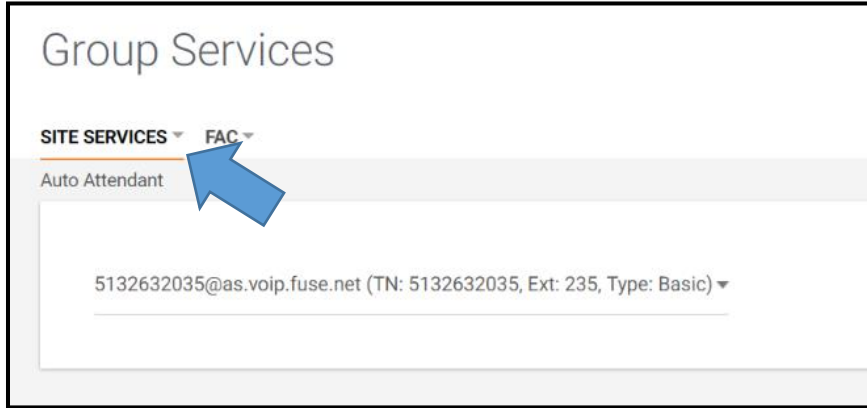
If you are not sure exactly what a feature is, simply hover over the feature name. An information box will open as shown below providing details on the particular feature.



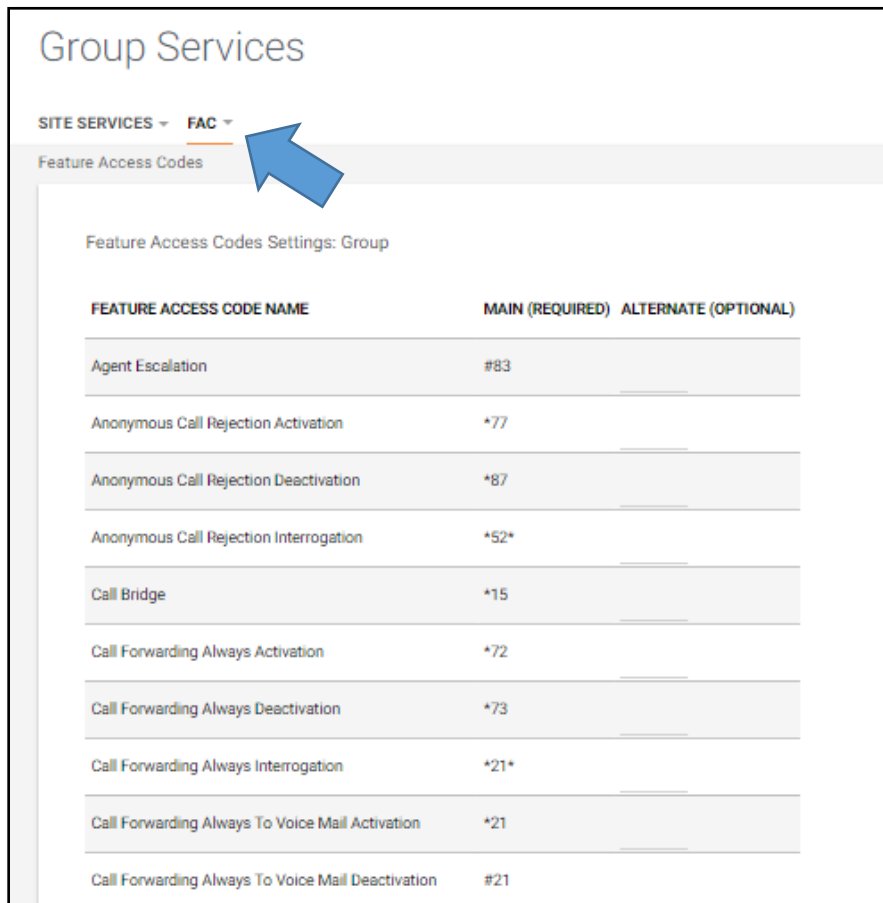
Group Services

In the Group Services Tab, the System Administrator can select a particular Group using the drop arrow.

Once selected you will be taken to the Group profile screen.

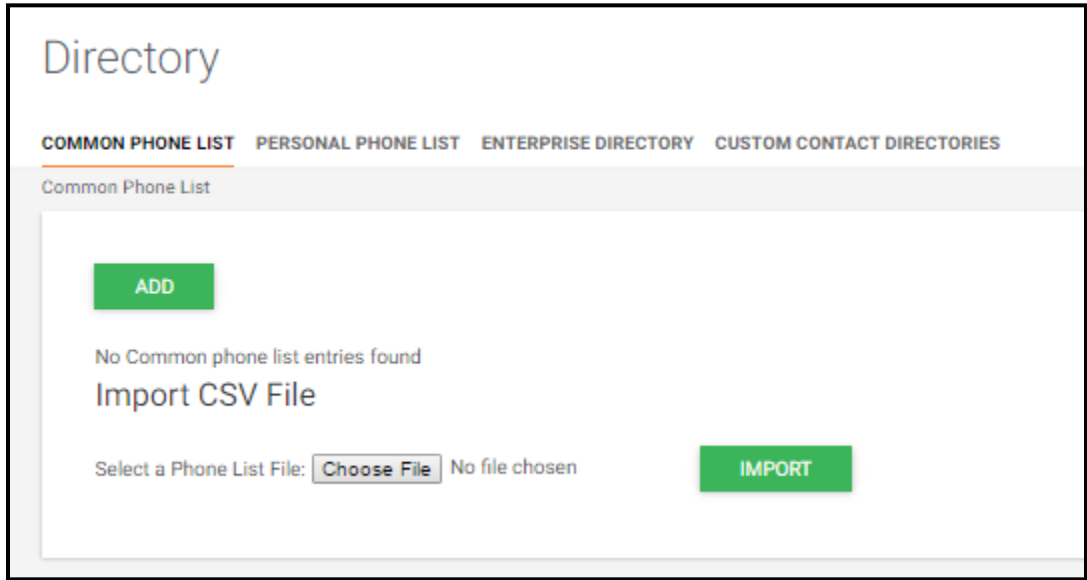


The FAC Tab in Group Services is where you will find the Feature Access Codes to all features. This is a great reference for feature activation.



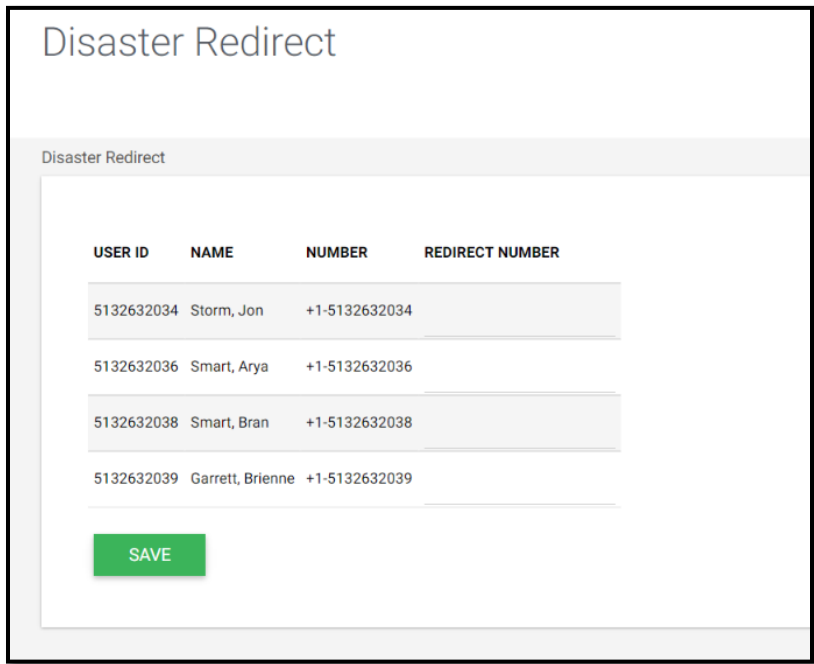
Directory

The Directory Tab is where the System Administrator can go to locate phone lists/directories. New directories can be created as well.



Disaster Redirect

The Disaster Redirect tab lists all Users in the Group and their redirect numbers if programmed.



Call Details

The final tab in the Group Administrator tab is Call Details. This is where reports can be created on the call history details for the Group.

Call Details

QUERY CALL DETAILS

Query Call Details

Report

User: All ⌵ Displaying logs for all users might take minutes

Sort by: Start date/time ⌵ in descending ⌵ order

Date range: from: 08/12/2016 📅 to: 08/19/2016 📅 (mm/dd/yyyy)

Include: Inbound calls Missed calls Outbound calls

Search by full or partial telephone number: _____

CREATE REPORT

Export

Email to: _____ SUBMIT

Export report to PDF SUBMIT

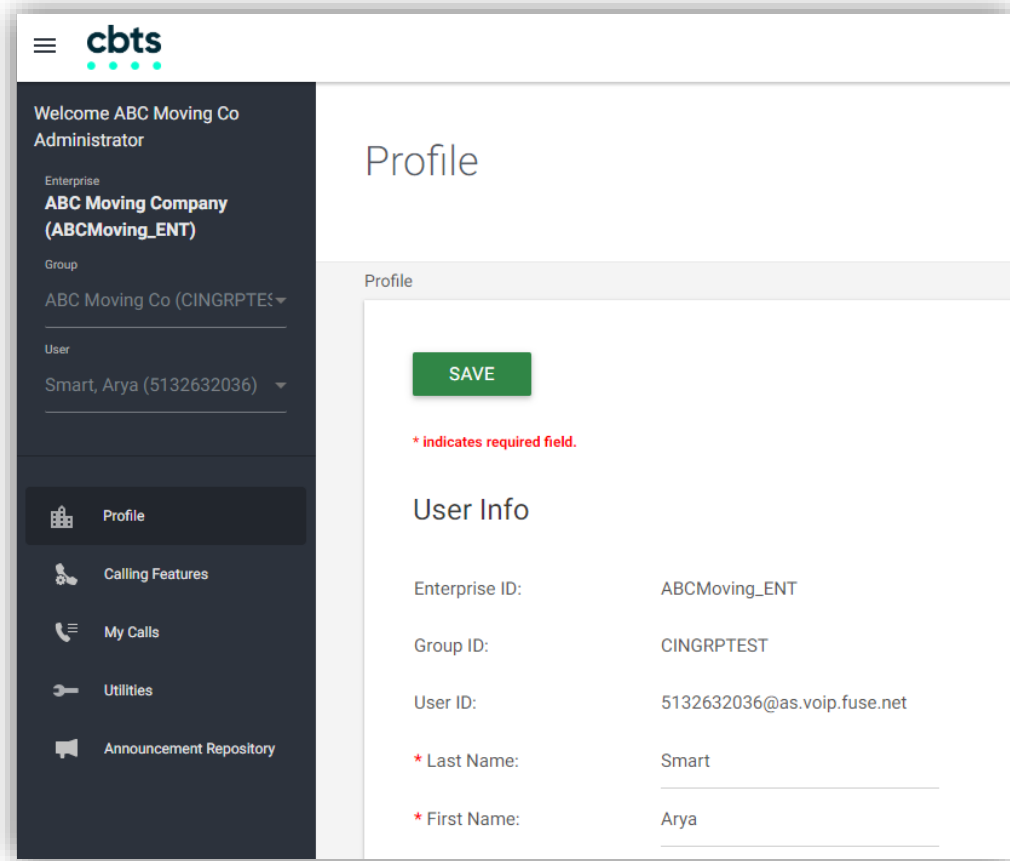
Export report to CSV SUBMIT

User Level

Once a Group is selected the System Administrator can select a particular User and will be taken to the User Level.

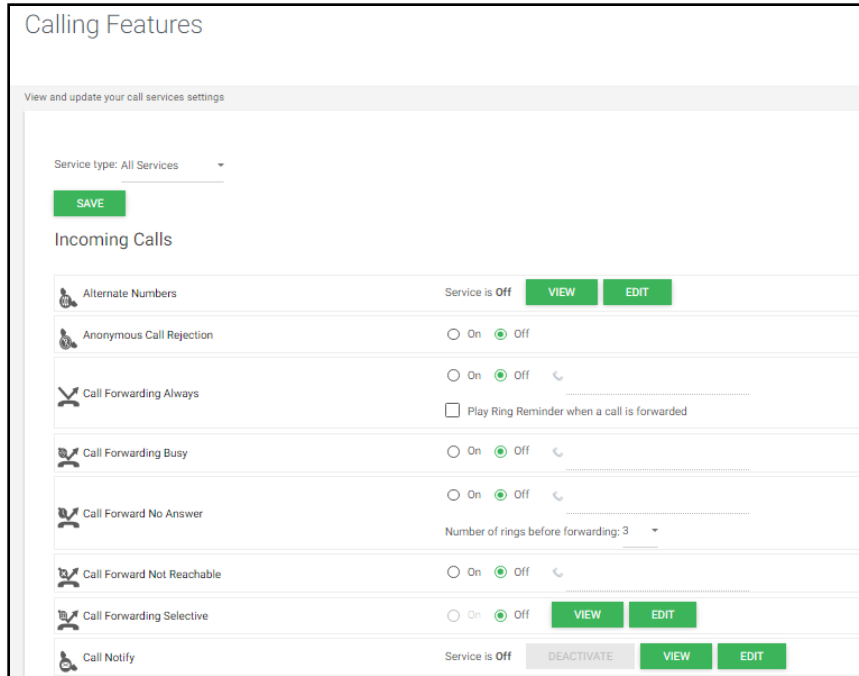
User Profile

The first tab in the User level is the Profile tab. This is where the User's general profile information may be found. Passwords may be re-set here as well.

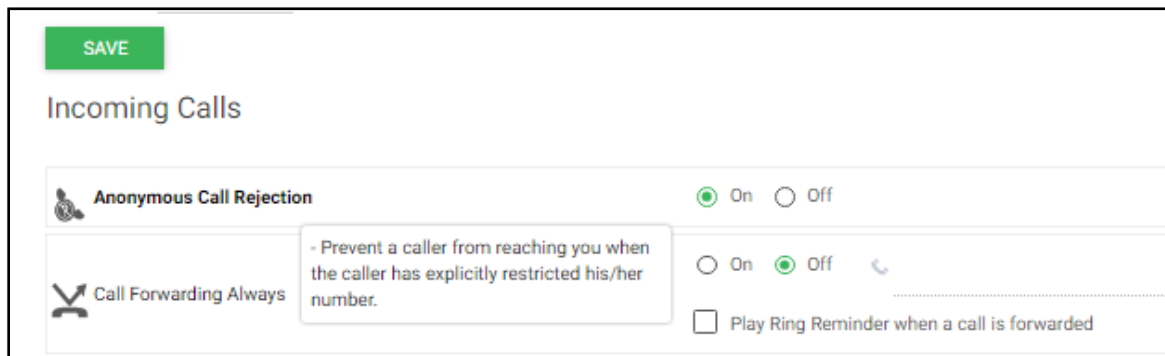


Calling Features

The Calling Features for a particular User are found in the Calling Features tab. This is where features assigned to a User can be off and on.



If you are not sure exactly what a Feature is, simply hover over the Feature name. An information box will open as shown below providing details on the Feature.



My Calls

In the My Calls tab, you may view particular calls of a User. Reports may be created and exported.

The FAC tab in Utilities is where you will find the Feature Access Codes to all features. This is a great reference for feature activations.

FEATURE ACCESS CODE NAME	MAIN (REQUIRED)	ALTERNATE (OPTIONAL)
Anonymous Call Rejection Activation	*77	
Anonymous Call Rejection Deactivation	*87	
Anonymous Call Rejection Interrogation	*52*	
Call Bridge	*15	
Call Forwarding Always Activation	*72	
Call Forwarding Always Deactivation	*73	
Call Forwarding Always Interrogation	*21*	

Administrative Quick Reference Sheet

Below is a quick reference to some of the common tasks completed inside of the Administrator Portal. Additional information including screen shots is provided further down in the guide.

Reset Voicemail Password

- Log in to Administrator Portal.
- Using the drop arrows select Group and select User.
- Click Profile tab.
- Scroll down to "Password Reset".
- Next to "Voice Portal Passcode" type in a new code or click "Generate".
- Click "Save" at the top or bottom of the page.

Modify User Profile

- Log in to Administrator Portal.
- Using the drop arrows select Group and select User.
- Click Profile tab.
- Click Profile and modify First Name, Last Name, Click "Save".
- Reset password under "Password Reset",
- Click the Calling Features Tab.
- Click "Off" to deactivate any Call Forwarding, Advanced ringing features and Broadworks Mobility.
- Under Messaging and Voicemail Email Management click "Edit".
- Turn off email notifications by clicking "Off" and then "Save".

Modify Hunt Group

- Log in to Administrator Portal.
- Using the drop arrows select the Group.
- Click on the Group Services tab.
- Under Site Services, use the down arrow to select Hunt Group.
- If there is more than one Hunt Group, use the drop arrow to select the appropriate one.
- You will be taken to the Hunt Groups Profile-Use the Add/Remove/Move Up/Move Down buttons to adjust the Hunt Group participants.

Modify Auto Attendant

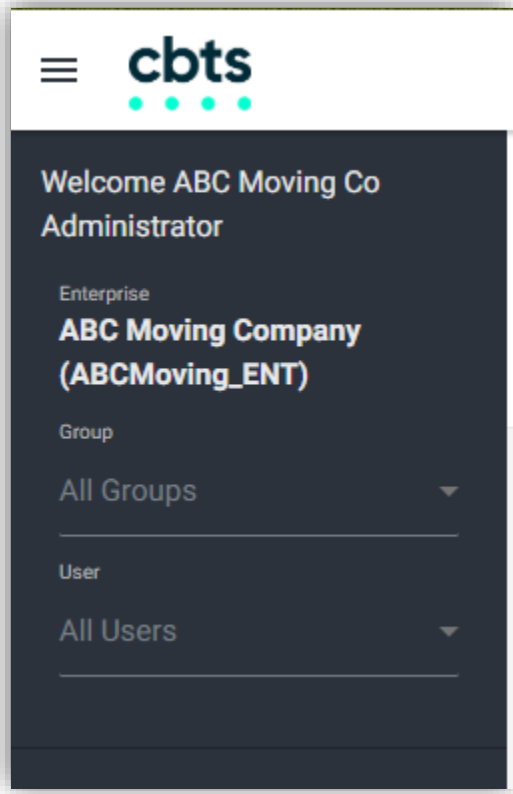
- Login to Administrator Portal
- Using the drop arrows, select the Group.
- Click on the Group Services tab (Site Services will default to Auto Attendant).
- If there is more than one, select the appropriate Auto Attendant using the drop arrow.
- Choose the appropriate menu: Business Hours or After Hours, and make changes.
- Re-record Auto Attendant to reflect changes made (See Auto Attendant sheet for recording help).

Simultaneous Ring Personal

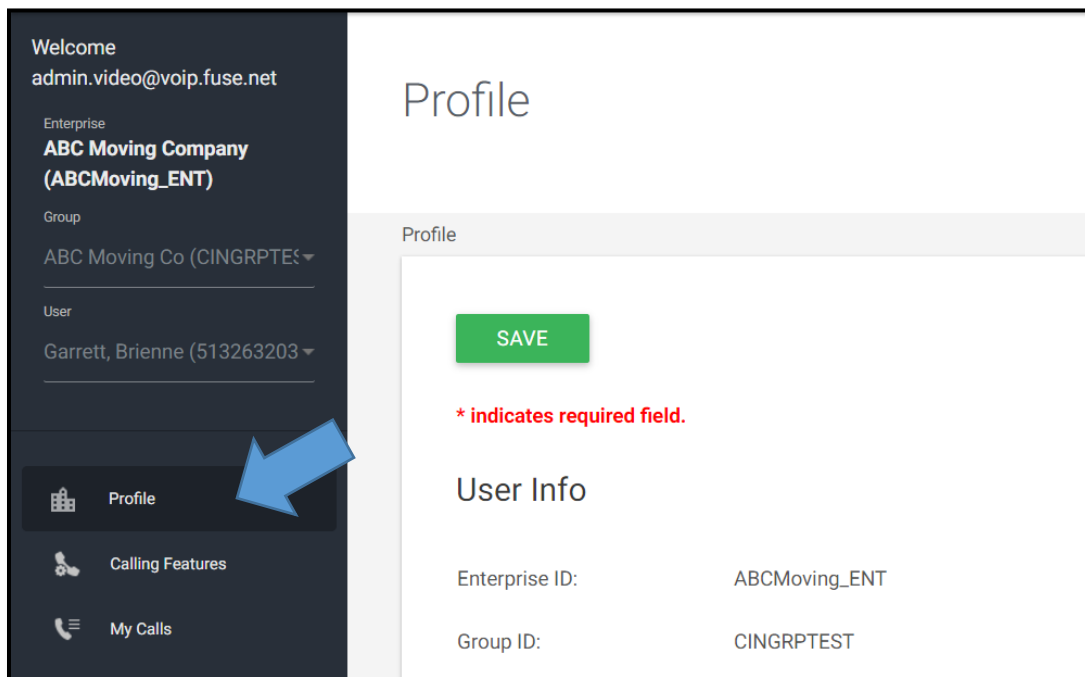
- Login to Administrator Portal.
- Using the drop arrows select Group and select User.
- Under Incoming Calls, you will see Simultaneous Ring Personal, click "On".
- Click "Edit".
- Make selections and enter the phone number.
- Click "Save".

Reset Voicemail Password

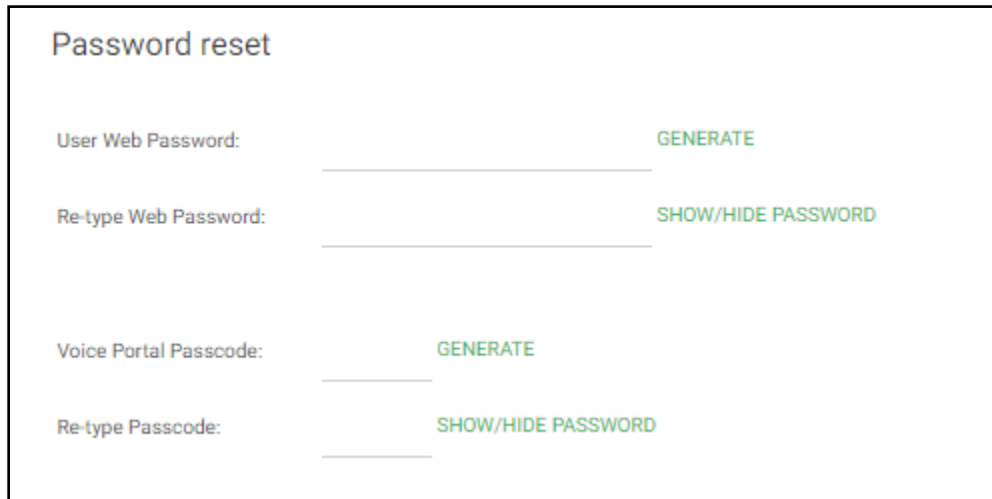
To reset a Voicemail Password log in to the Administrative Portal. Using the drop arrows select the appropriate Group and User that requires the password reset.



Click on the Profile Tab just below the User name.



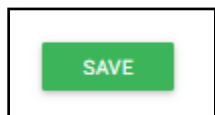
Scroll down to the “Password Reset” section. Next to “Voice Portal Passcode” type in a new code or click “Generate.”



The screenshot shows a "Password reset" form with four input fields and associated actions:

- User Web Password:** Input field with a **GENERATE** button to its right.
- Re-type Web Password:** Input field with a **SHOW/HIDE PASSWORD** button to its right.
- Voice Portal Passcode:** Input field with a **GENERATE** button to its right.
- Re-type Passcode:** Input field with a **SHOW/HIDE PASSWORD** button to its right.

Click “Save” at the top or bottom of the page to save the change.



Modify User Profile

Modifying a user profile may occur if a simple change is required. An example is when employee turnover is experienced. The settings demonstrated below will ensure that company information and calls only flow to the proper party.

To Modify a User Profile, navigate to the User Profile.

NOTE: Voicemail settings should also be reset and changed to reflect a new User. To accomplish, follow the steps outlined above in the “Reset Voicemail Password” section.

Caller ID Change

If the User Profile is undergoing a name change, click the Profile tab after navigating to the proper User's profile. Once the Profile is selected, you will see the settings for the User.

SAVE

* indicates required field.

User Info

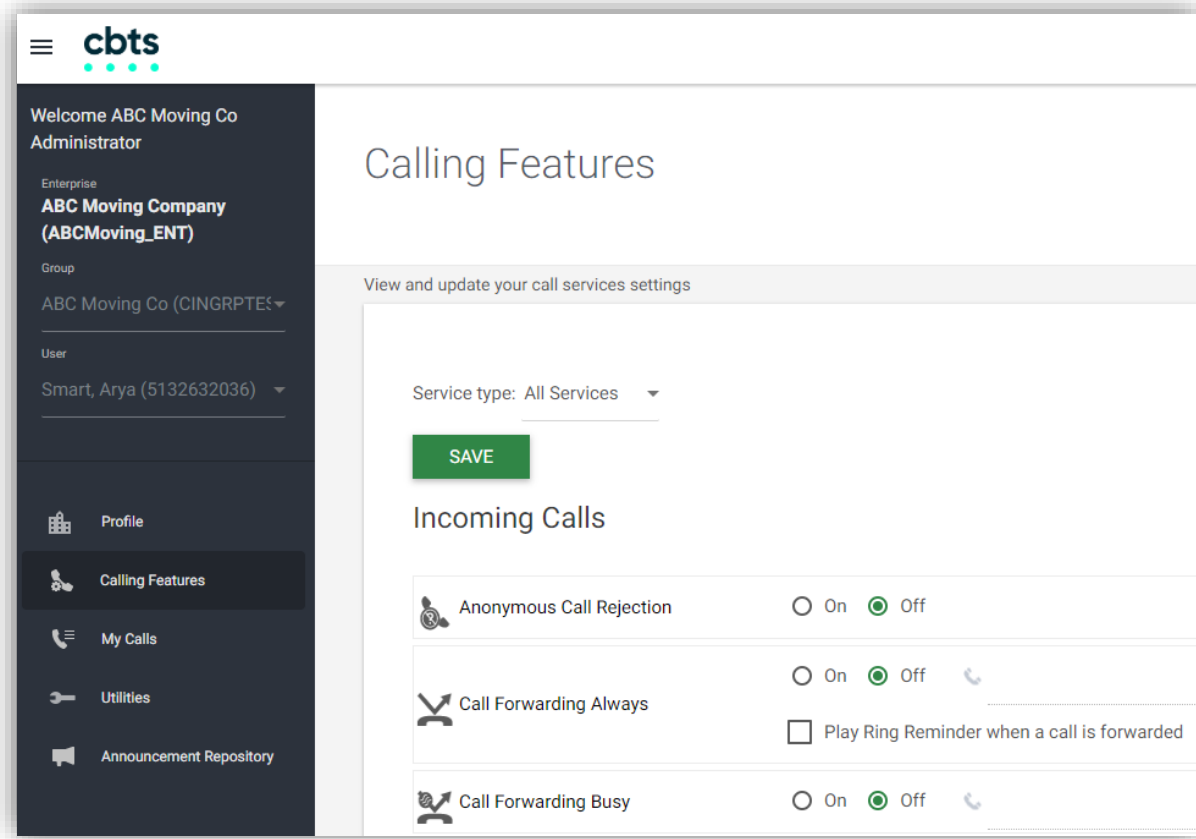
Enterprise ID:	ABCMoving_ENT
Group ID:	CINGRPTEST
User ID:	5132632039@as.voip.fuse.net
* Last Name:	Garrett
* First Name:	Brienne
* Calling Line ID Last Name:	Garrett
* Calling Line ID First Name:	Brienne
Calling Line ID Phone Number: 5132632039	
Department:	None ▼
Language:	English ▼

By changing the Last Name and Calling Line ID fields, you will be “reassigning,” in name only, the phone number/extension from one individual to another. The “Additional Information” directly below this may also be changed to reflect the new User.

After changing the voicemail and name, it is important to check and change any advanced features which may be assigned. **Example:** Call Forwarding, Anywhere, and Voicemail Emails. This will ensure all information targeted flows to the proper party, and the previous phone User no longer has access or receives information from that phone.

Call Forwarding & Advanced Ring Features

Within the User Profile, select the Calling Features tab on the far left navigation.



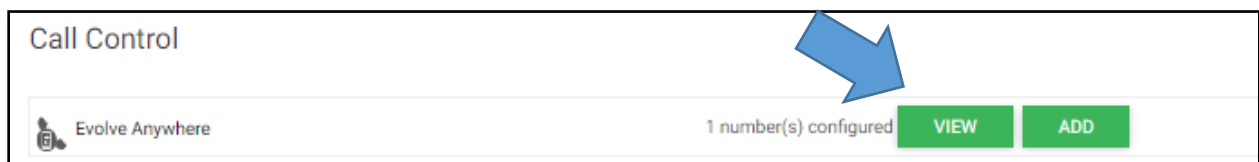
Ensure that all features are off by clicking the “Off” radio buttons.

Click “Save” at the top or bottom of the page to save the change.

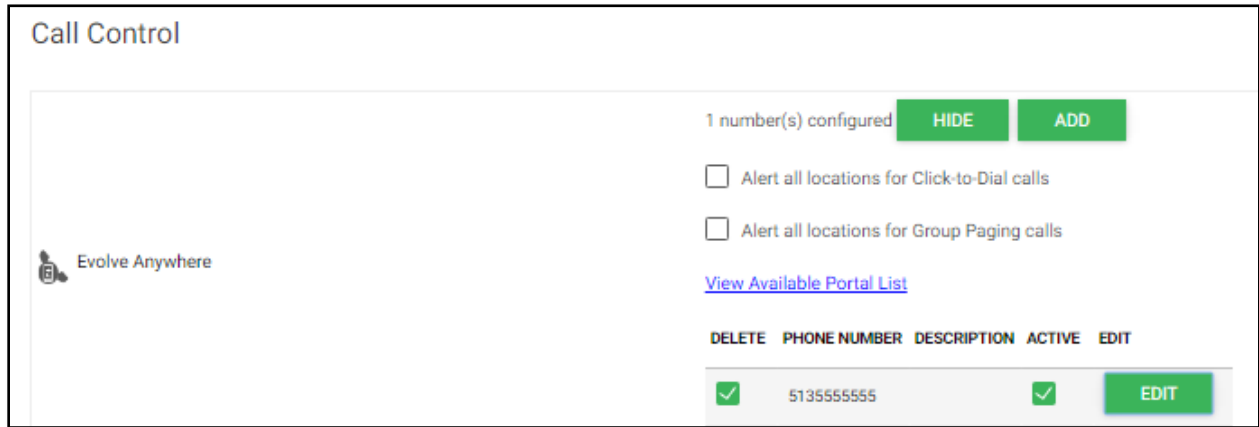
Anywhere & Remote Office

Anywhere is a feature allowing an outside line (Mobile phone) to make calls with the appearance of calling from the office, which may also be used as part of Simultaneous Ring. It is important to deactivate Anywhere when an employee moves, or to update the settings to reflect the new employee.

To change the Anywhere settings, navigate to the Calling Features tab within the proper User’s profile. Under Call Control you will see Anywhere. To the right, click “View.”



Check the box under “Delete.” Click “Edit,” then click “Save.”



NOTE: Activating Anywhere, Mobility, UC One endpoint termination or Remote Office on any user contained in a hunt group will override Call Forwarding Not Reachable.

Scroll down and click the “Off” radio button to turn off Remote office. Then click “Save”.



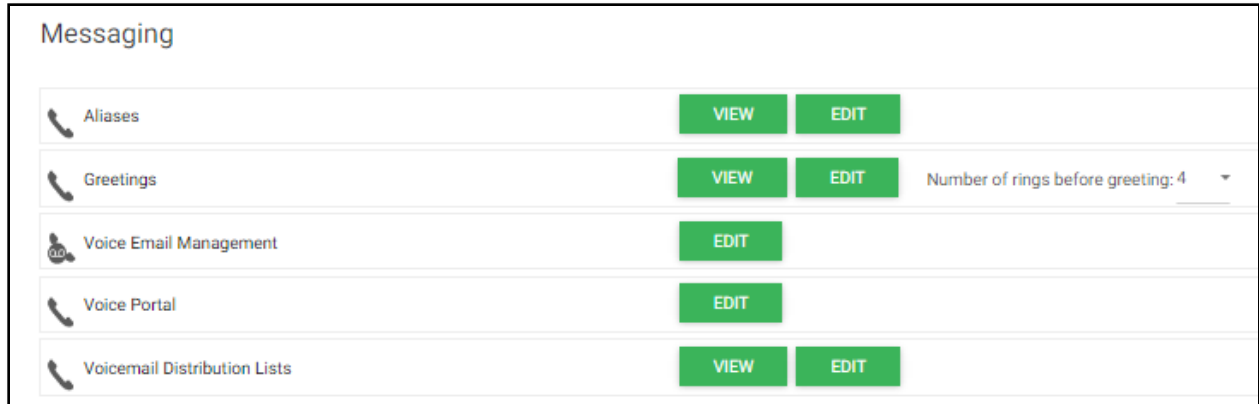
Voicemail to Email & Zero Out

The system has the capability of emailing carbon copies of any voicemail message to an email address.

The Zero Out option transfers a caller from the voicemail to another number when the “0” key is pressed.

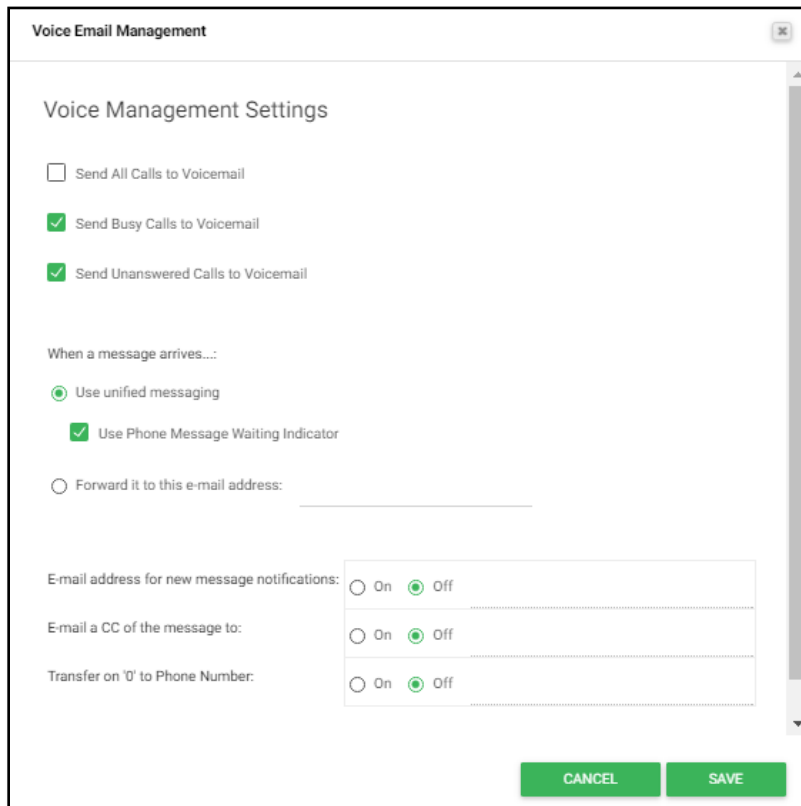
The Voicemail to Email setting is generally provisioned on initial installs. If an employee email changes or staff turnover occurs, this setting should be modified accordingly.

Navigate to the proper User's profile section and click the Calling Features tab. Scroll down to Messaging.



Within the Messaging settings, click “Edit” next to the Voice Email Management.

The bottom fields of the Voice Management section control the emails and Zero Out options. Click the “Off” radio buttons and then “Save.”

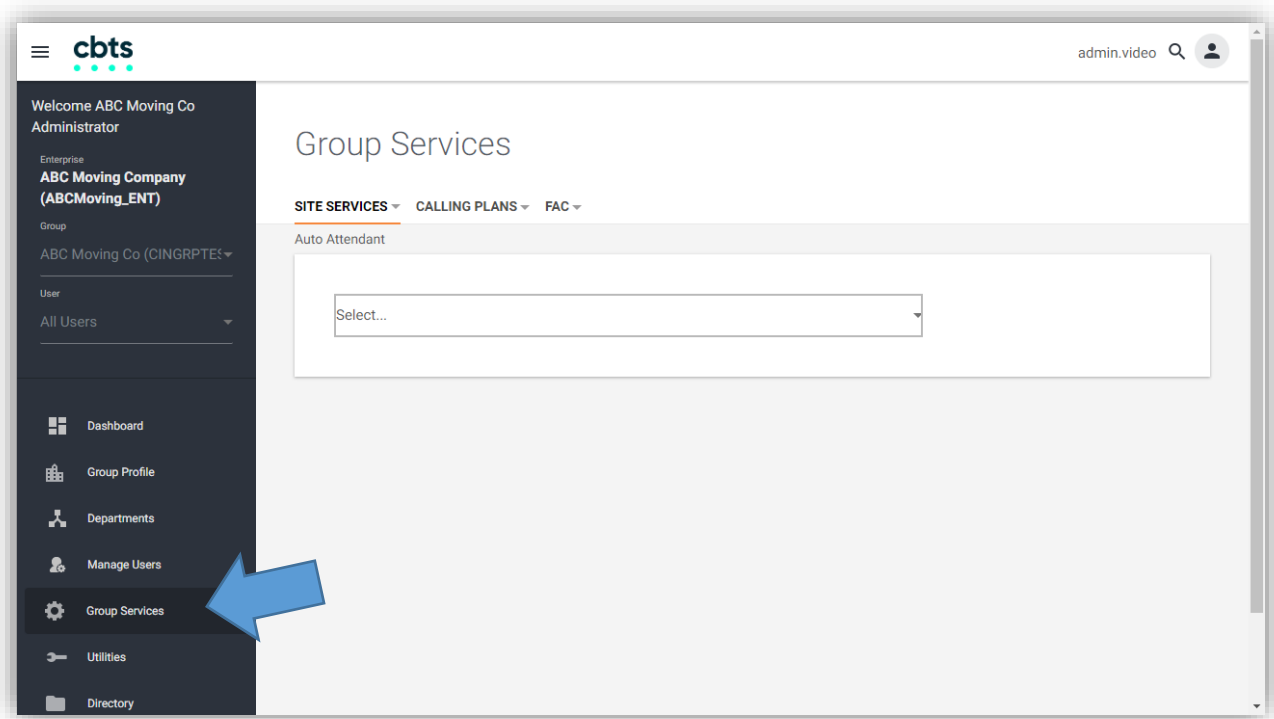


Modify Hunt Group

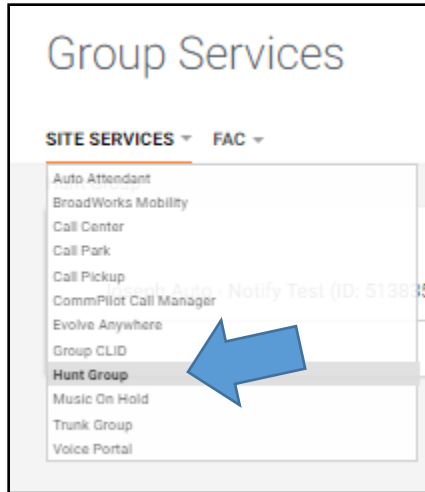
A Hunt Group is a service that allows multiple users to receive calls when a certain number is dialed. A company's main number may be tied to a Hunt Group. Example, when the Hunt Group number is dialed, all phones assigned to the Hunt Group ring.

NOTE: Activating Anywhere, Mobility, UC One endpoint termination or Remote Office on any user contained in a Hunt Group will override Call Forwarding Not Reachable.

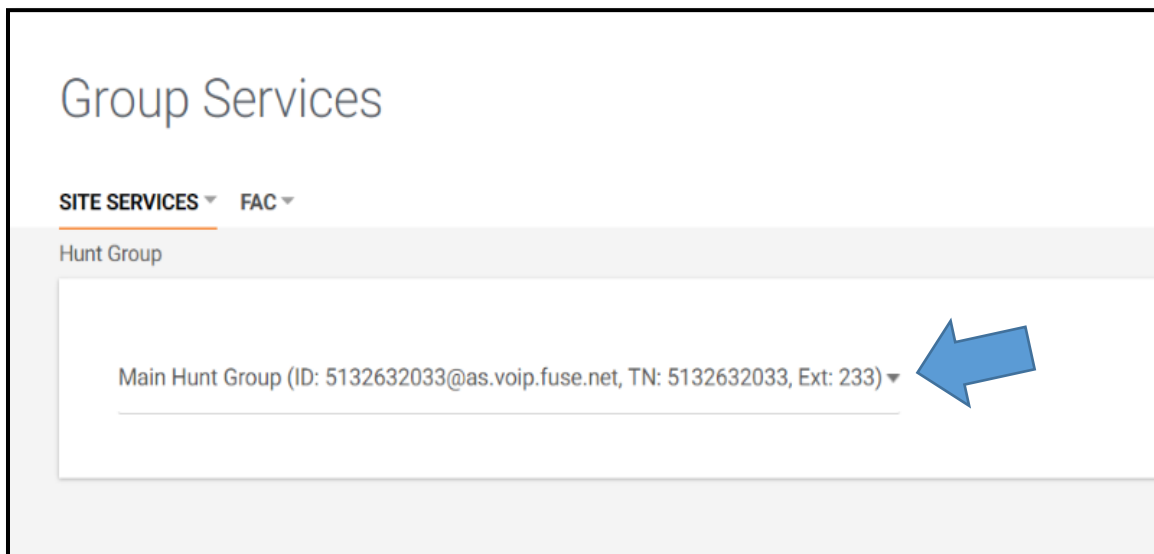
From the Administrator Portal, use the drop arrows to select the Group. Click on the Group Services tab.



Under Site Services use the down arrow to select Hunt Group.



If there is more than one Hunt Group, use the drop arrow to make your selection using the drop arrow.



You will see the Hunt Group's Profile. The profile is separated into several settings where changes may be made.

Profile

Profile

*** indicates required field.**

Profile Settings

Hunt Group ID: 5132632033@as.voip.fuse.net

* Name: Main Hunt Group

* Calling Line ID Last Name: :

* Calling Line ID First Name: MAIN

Department: None

Language: English

Time Zone: (GMT-04:00) (US) Eastern Time

Allow Call Waiting on agents

Circular

Regular

Group Policy: Simultaneous

Uniform

No Answer Settings

Skip to next agent after 5 rings

Forward call after waiting 5 seconds

Call forwards to: *555138350937

Not Reachable Settings

Enable Call Forwarding Not Reachable

Call forwards to:

Make Hunt Group busy when all available agents are not reachable

Calling Line ID Settings

Use the system default CLID configuration (currently including the Hunt Group Name in the CLID)

Customize the CLID for this Hunt Group:

Include the Hunt Group Name in the CLID

Use the Add/Remove/Move Up/Move Down buttons to adjust the Hunt Group participants.

Users

Group ID: ABC Moving Co (QINGRPTST) Department: Any

Last Name: First Name: SEARCH

Available Users

Assigned Users
Garrett, Brienne (5132632039@as.voip.fuse.net)

ADD >
< REMOVE
ADD ALL >>
<< REMOVE ALL

MOVE UP MOVE DOWN

Call Policies may be changed at the bottom of the screen using the radio buttons.

Call Policies

View or modify Call Policies for the User

Connected Line Identification Privacy on Redirected Calls:

- No Privacy
- Privacy For External Calls
- Privacy For All Calls

Send Call Being Forwarded Response on Redirected Calls:

- Never
- Internal Calls
- All Calls

Calling Line Identity for Redirected Calls:

- Originating Identity
- Redirecting User Identity For External Redirections
- Redirecting User Identity For All Redirections

SAVE

When all changes have been made to the Hunt Group click "Save."

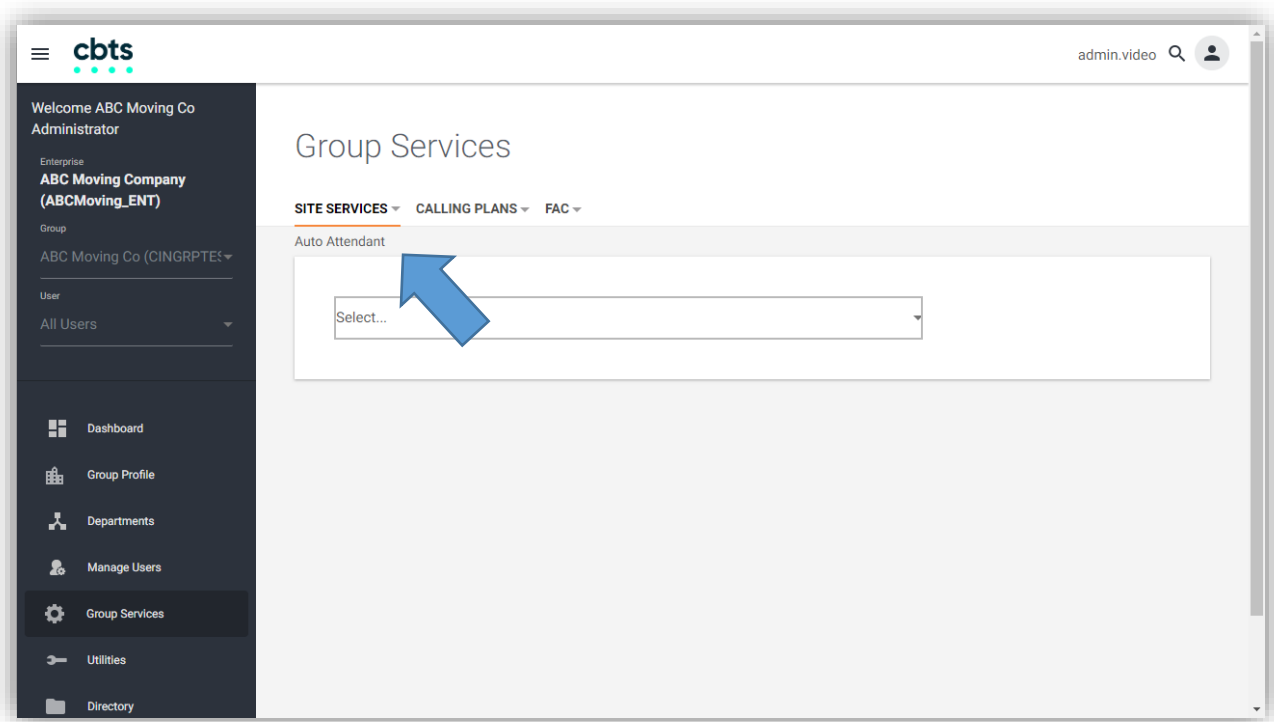
Modify Auto Attendant

Auto Attendant Administrative Changes

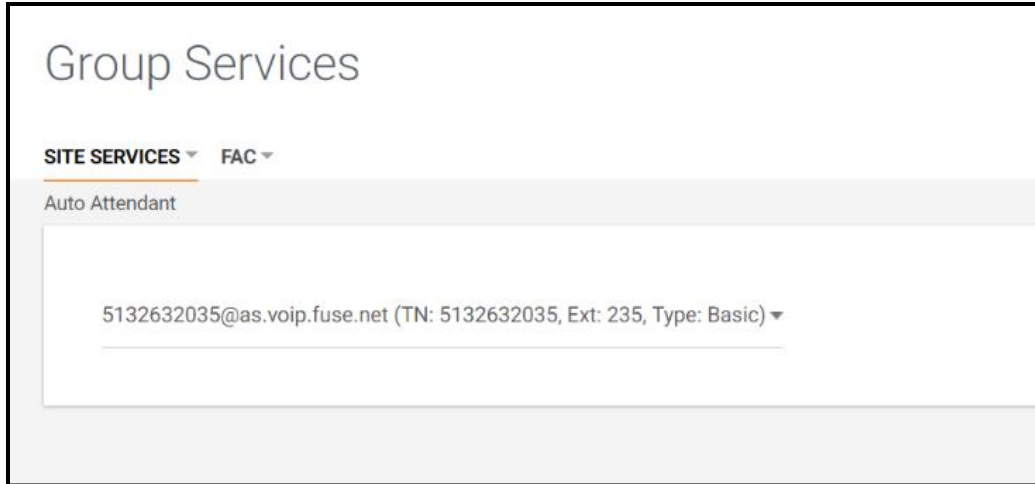
An Auto Attendant is an automated messaging service utilized to navigate calls to the proper User or Group.

The instructions below show how to change the Auto Attendant within the Administrator Portal. To make the corresponding greeting changes that callers will hear, please reference the Auto Attendant Voice section.

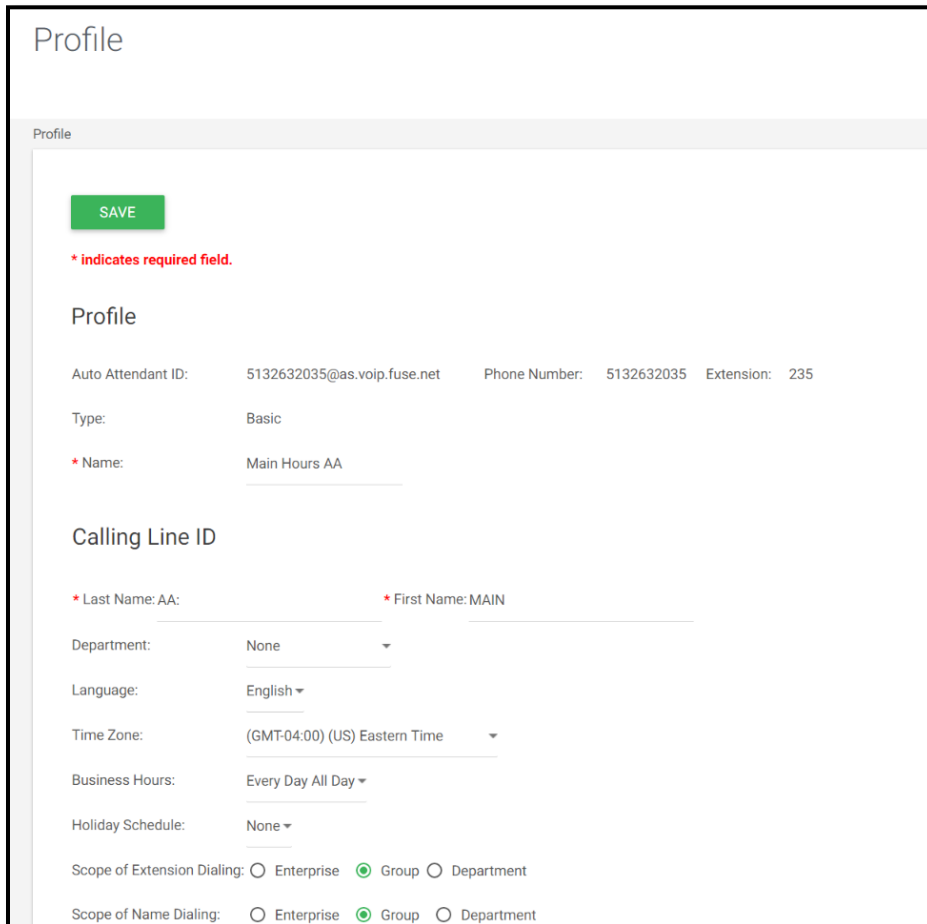
Within the Group level, select the Group Services tab. Notice that the Auto Attendant is the default under Site Services.



If there is more than one Auto Attendant, select the appropriate Auto Attendant using the drop arrow.



You will see the Auto Attendant Profile.



Scroll down to choose the appropriate Menu: Business Hours or After Hours, and make changes.

Business Hours
After Hours

Business Hours Greeting

Default Greeting

Personal Greeting

Business Hours Dialing Menu

Enable first-level extension dialing

KEY	DESCRIPTION	ACTION	PHONE
0		Transfer To Operator	▼
1		Extension Dialing	▼
2		Name Dialing	▼
3		---	▼
4		---	▼
5		---	▼
6		---	▼

Once your changes are made click "Save."

Note: Please re-record the Auto Attendant Greeting to reflect changes made (See Auto Attendant Greeting Changes for recording help).

Auto Attendant Greeting Changes

Any changes made to an Auto Attendant, must have a corresponding greeting change. Example, if you change option 2 from "Ben" to "Kyle," you should prepare a new script and a recorded greeting; so callers know when they press "2," their call will go to Kyle.

Please follow the instructions below to make greeting changes:

- Using your Hosted UC phone, press the Messages Key and then the Connect soft key.
- Press the * key.
- When prompted for the Mailbox ID, enter the extension of your Voice Portal Number: _____.
- Enter your passcode followed by the # key _____.
- Press 1 to change an Auto Attendant Greeting.
- If you have more than one Auto Attendant, enter the extension of the Auto Attendant you are changing.

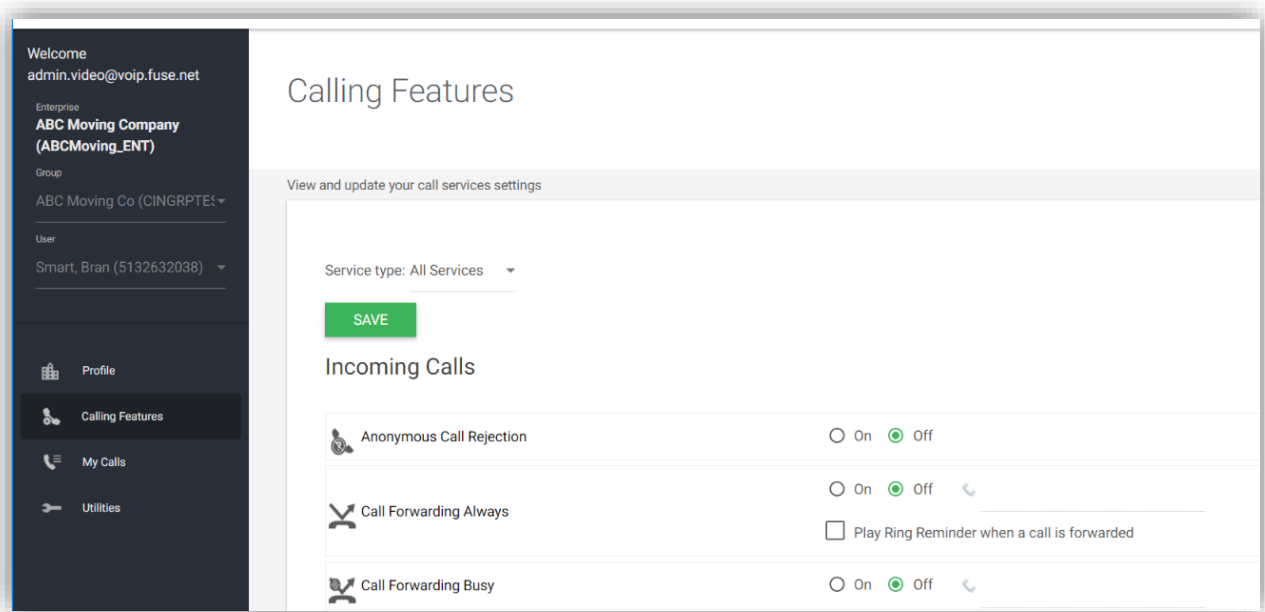
- Press 1 to change the Business Hours Greeting.
- Press 2 to change the After Hours Greeting.

These instructions may also be referenced with specifics to your company's Auto Attendant in the [Program Your Auto Attendant](#) section.

Simultaneous Ring Personal

Simultaneous Ring allows a User to maintain reachability regardless of location. This feature will allow your mobile phone, home phone, or any other device to ring at the same time as your desk phone. This gives additional flexibility and mobility.

Navigate to the User Profile to activate Simultaneous Ring. Using the drop arrows, select the appropriate Group and then User. Click on the Calling Features tab.



Scroll down to Simultaneous Ring Personal. Click the radio button “On” and then click “Edit.”



This will reveal the Simultaneous Ring options.

Simultaneous Ring Personal

* indicates required field.

How to handle incoming calls:

Don't ring my Simultaneous Ring Numbers if I'm already on a call

Ring all my Simultaneous Ring Numbers for all incoming calls

Phone Numbers

Phone Number	Answer confirmation required
No phone numbers present	

ADD

Active Description Time Schedule Holiday Schedule Calls From

ADD RULE...

CANCEL SAVE

Select how you want to direct incoming calls. Add the device phone number by clicking "ADD." Once all specifications are entered click "Save."

Anywhere Feature

Anywhere allows you to unify all of your dialing plans into one number and voicemail box. Enabling you to maintain reachability by giving out only one phone number to contacts. This feature also allows you to place calls and screen your device's number so the Caller ID displays your company's phone number and not your personal device number.

NOTE: Activating Anywhere, Mobility, UC One endpoint termination or Remote Office on any user contained in a hunt group will override Call Forwarding Not Reachable.

Anywhere Reference Sheet

Anywhere Number: _____

Configuring Anywhere

- Login to Administrator Portal.
- Using the drop arrows, select the Group and then select the appropriate User.
- Click the Calling Features tab.
- Scroll down to Call Control.
- To the right of Anywhere click "Add".
- Add the phone number that is to have access to Anywhere.
- Describe the above device in Description field.
- Click the 3 check boxes in Advanced Options.
- Click "Save".

Utilizing Anywhere

Deactivate Anywhere on any Device

- Dial your Anywhere number from the device you wish to deactivate.
- Listen for the prompt "Please enter the destination digits".
- Press*13.

Activate Anywhere on any Device

- Dial your Anywhere number from the device you wish to activate.
- Listen for the prompt "Please enter the destination digits".
- Press *12.

Moving an Active Call from One Device (Mobile) to Your Desk Phone

- Pickup your desk phone handset.
- Press *11 and your call will then migrate to your desk phone.

My service was installed/activated on _____.

NOTES:
