MITEL

3600 | Hosted Key System

ADMINISTRATOR GETTING STARTED GUIDE
Release 3.0

MITEL | it's about YOU

NOTICE

TRADEMARKS

Mitel 3600 Hosted Key System – Administrator Getting Started Guide
Release 3.0, Revision A
December 2006

Table of Contents

Welcome

Congratulations on acquiring your new MITEL® 3600 Hosted Key System!

The 3600 Hosted Key System provides all the phone features that small businesses use, without the up-front cost and ongoing maintenance inherent in owning a traditional key system.

The 3600 Hosted Key System also provides the ability to self-manage your telephone system through an intuitive graphical interface that runs on your web browser.

As an administrator, you can easily add telephone users, set their phone configurations, manage how inbound calls will be routed, and control various other features.

Individual users are also able to customize features on their phones, such as setting up their own call coverage.

Scope of this document

This document provides the basic information you need to start configuring your telephone system. For information about how individual telephone users can get started, refer to the appropriate *Getting Started Guide Release 2.0*.

If you require more detailed information about any of the features and capabilities of the system, access the online help provided from the administrator web interface or from the telephone user web interface.

3600 Hosted Key System features

The 3600 Hosted Key System provides a number of sophisticated, easy-to-use features allowing users to make the most effective use of their telephones.

Features included are:

- **Self-Management Web Interface** - Both administrators and telephone users can use their web browser to manage company and individual phone settings.
- **Account Codes** – The system can be programmed with account codes that allow users to associate a code with an incoming or outgoing call for easier call tracking.
- **Auto Attendant** - The system is supplied with the ability to configure auto attendants that will provide recorded voice messages and a spoken name directory through which callers to your company can direct their calls to any extension.
- **Broadcast Groups** - Incoming calls to a broadcast group are routed to all group members at the same time causing all available members' phone lines to ring simultaneously. The phones stop ringing once the call has been answered by any member for the broadcast group, or forwarded to call coverage.
- **Call Coverage** - The user can specify how their unanswered calls should be directed. Options include voice mail, auto attendant, or to another phone number.
- **Call Forwarding** - The user can configure their phone to immediately forward to other extensions, external numbers, voice mail, or the auto attendant.
- **Call Park** - Users can put a call on hold into a Park location and another user can retrieve the call from a different phone.
- **Directory** - Users can use the company directory via their phone's LCD display or via their web interface.
- **Hunt Groups (circular)** - Incoming calls to a circular hunt group are routed to the next member in a predetermined/pre-assigned list of individuals designated to that hunt group.
- **Hunt Groups (linear)** - Incoming calls to a linear hunt group are routed to each group member in turn, and always start with the first member listed. Each phone rings in turn for a prescribed number of rings. If the call is not answered, it is passed to the next available member's line.

- **Monitor Groups** – There are two types of monitoring available when setting up Monitor Groups: Monitor Calls - Incoming calls to the primary group member can be monitored and picked up by secondary group members if they have the appropriate memory key configuration on their phones. Monitor Phone – Users can monitor when the primary group members phone is active if they have the appropriate memory key configuration on their phones. This memory will also act as a speed dial to the extension being monitored.
- **Page** – Users can page all phones at the site that are in an idle state after programming a memory key. A page is a one way broadcast to the other phones at the site through the phones speaker.
- **Rollover Groups** – Incoming calls to a rollover group are presented to the first idle extension in the group. Call coverage for rollover groups is the same as call coverage for hunt groups.
- **Speed Dial** - Users can program keys to automatically dial their commonly used numbers for them.
- **Three-Way Calling** - Users can make conference calls with three people at once.
- **Transfer** - Users can transfer calls to other phones.
- **Twinning** – Users can enable their incoming calls to ring an external phone (e.g., their cell phone) simultaneously. Users can also pull back a call to their desk phone form the other phone.
- **Voice Mail** - The system integrates with voice mail systems allowing users to receive and retrieve voice mail messages.

Administrator basics

To administer your telephone system, connect to the administration web page. The following table outlines the basic tasks that you need to perform to configure your system. For complete details access web help by clicking on Help from any page in the web interface in your browser or refer to the *Administrators Reference Guide*.

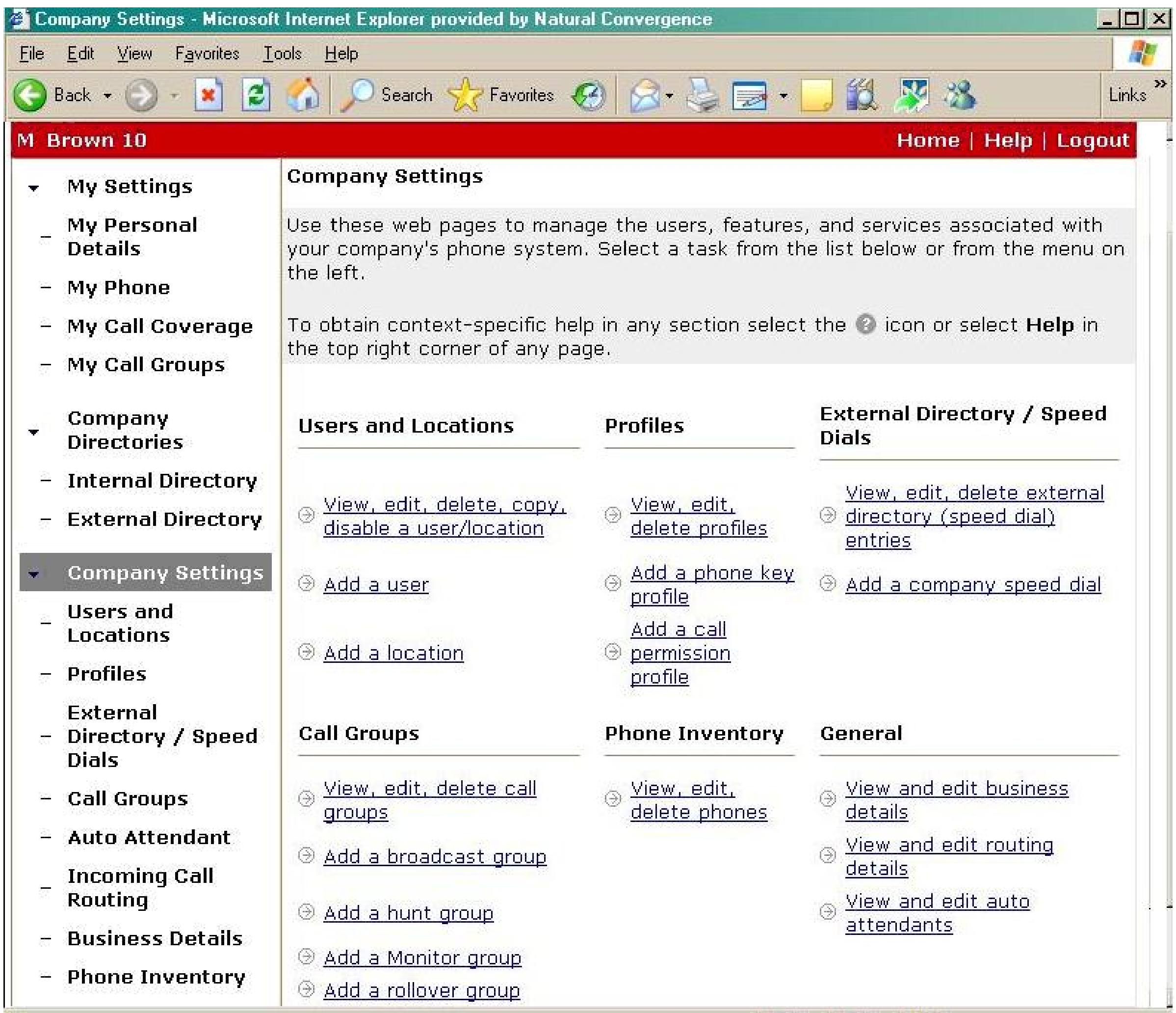
Task	Directions	Compulsory	Comments
Log in to web browser	How to log in on page 4	Yes	
Configure business hours	How to configure your business hours details on page 5	No	Specify your business hours to control call behavior at different times during the day.
Set up a permission profile	How to set up permission profiles on page 5	No	Create your own permission profile(s) specific to your business requirements. The default settings can also be used.
Set up a phone key profile	How to set up phone key profiles on page 7	No	Create your own profile to suit your needs. The default settings can also be used.
Add users	How to add users or locations on page 6	Yes	Add as many as necessary. Note that you may need to notify users of their PIN.
Add auto attendant	How to add auto attendants on page 8	No	
Configure inbound calls	How to manage inbound call behavior on page 7	Yes	Associate the phone numbers that have been assigned to you with the extension of a user or location.
Add voice mail	How to enable voice mail on page 9	No	
Add company speed dial numbers	How to add a company speed dial number on page 9	No	
Set up account codes	How to set up account codes on page 9	No	Check with your telco to ensure that this is available.
Set up announcement on hold	How to set up hold announcement on page 10	No	
Add a broadcast group	How to add a broadcast group on page 11	No	
Add a bunt group	How to add a hunt group on page 12	No	
Add a monitor group	How to add a Monitor group on page 13	No	
Add a Rollover group	How to add a rollover group on page 13	No	
Add users to a call group	How to assign users to a call group on page 14	No	You must create the call group before assigning users.

How to log in

To log in to the web administration interface, follow these steps:

1. Open your Web browser (Internet Explorer 6.0 or Firefox 1.5.0.4)
2. Enter the URL for the web administration interface (provided by your service provider). The Login screen appears.
3. Enter your extension and PIN (provided by your service provider).
4. The web page opens to display your personal settings, directories, and the company settings.
5. Select **Company Settings** on the left-hand frame to see the administrative actions available to you.

The following screen shot shows what you should see in your web browser:



How to configure your business hours details

Your business hours specify when your company is open, when it is closed, when you have lunch and also allows a user-definable "special" time. The business hours can be used to change the behavior of your telephone system depending on what time it is. For instance, you could route your incoming calls to a receptionist when the company is open and to the auto attendant when the company is closed.

To configure your business hours details:

1. Select **Company Settings** in the left menu.
2. From the **General** menu appearing in the main frame, select **View and edit business details**.
3. Scroll down to the Business Hours – in 24 Hour Time section.
4. Check the **Open?** check box beside each day that your company is open for business. Clear or leave the **Open?** check box blank for every day that your business is closed. The **Open?** check box can be cleared without losing the business hours information.
5. Type the **From** and **To** hours of service for each day of the week.
6. Select the **Save** button at the bottom of the page to save your changes.

How to set up permission profiles

Permission profiles store specifications for the kind of calls your telephone users are allowed to make (such as long-distance, toll-premium, etc) and when (such as when the company is open, during lunch, etc). When you create a telephone user, you assign a permission profile.

To add a permission profile, follow these steps:

1. Select **Profiles** in the left menu.
2. Select **Add Permission Profile** from the **Add** list.
3. Type a **Profile Name**.
4. To allow a call type, select the appropriate **Call Type** check boxes:
   To allow a call type to occur at any time on any day of the week, select all of the check boxes beside the call type.
   To allow a call type to occur only during certain business hours, select the check boxes beside the call type that corresponds to the business hours during which the call type is allowed.
5. To disallow a call type, clear all the check boxes beside the call type.
6. Repeat Step 4 and 5 for each call type.
7. Select the **Save** button to save your changes.

Notes:

- Emergency and internal call types are enabled by default and cannot be disabled for all business hours in all profiles.
- Phones without a user logged on to them are assigned to the default "Unassigned" permission profile.

How to set up phone key profiles

Phone key profiles let you predefine a set of Memory Keys for telephones. For instance, you could create a profile for phones that have One Touch Speed Dial to the company's IT support line. When you create new users, you can assign them this profile and that key will automatically be configured for them.

To create a phone key profile:

1. Select **Profiles** in the left menu.
2. Select **Add Phone Key Profile** from the Add list.
3. Type a Profile Name.
4. Select the **Program Memory Keys** button to configure the memory key options.
5. Select a phone key configuration option from the list beside a memory key.
6. If required, type additional details.
   To prevent a user from changing the selected memory key configuration, select the check box in the lock column beside the key.
7. Select the **Save** button to save your changes.
8. Select the **Close Window** button to close the window.

Tip: As a minimum, a phone key profile should contain at least two line appearances as the bottom right keys. In addition you should create a Park/Retrieve key and a Page key. Lock these keys by checking the Lock checkbox to prevent the user from changing function.

How to add users or locations

Users represent the people within your company, and locations represent telephones that are not associated with any single user. For example, a telephone in a conference room or a main reception area is entered into the phone system as a location.

To add a user or location:

1. Select **Users and Locations** in the left menu.
2. Select **Add User** or **Add Location** from the Add list.
3. Enter information in the fields as required.
   Fields marked with a * are mandatory.
4. Select a permission profile from the **Permission Profile Name** list in the Permissions section. The "Unassigned" profile, which supports emergency and internal call types, is assigned by default.
5. Select a phone key profile from the **Profile Name** list in the **Phone Keys** section. The "System Settings default" profile is assigned by default.
6. Select the **Save** button to save your changes.

Note: If the new user's PIN is displayed to you, it is your responsibility to communicate this information to the user. Your service provider configures the method of PIN notification.

How to add auto attendants

The auto attendant provides audio greetings to incoming calls and the facility to route calls to any extension. It also contains a name directory that incoming callers can access through their telephone keypad.

To add a new auto attendant:

1. Select **Company Settings** in the left menu.
2. From the **General** menu appearing in the main frame, select **View and edit auto attendants**.
3. Select the **Add Auto Attendant** button.
4. Type the auto attendant name in the Auto Attendant Name field**.**
5. Select an **Extension** for the auto attendant from the Extension list. The Extension list displays the next five available extensions for auto attendants. You can enter a different valid extension by selecting **Other** from the Extension list and typing the extension of your choice in the text field provided.
6. Check the **Time of Day Greetings** check box to turn on the Time of Day Greetings (optional)**.**
7. **Save** your settings or **Save and Record All** of your greetings.

How to manage inbound call behavior

Your company has been assigned one or more DIDs (Direct Inward Dialing numbers). As a tenant administrator, you need to specify where calls should go when an external party dials one of these DIDs. For example, you may want to make all your incoming calls go to the auto attendant.

To configure your incoming call behavior:

1. Select **Company Settings** in the left menu.
2. From the menu appearing in the main frame, select **View and edit routing details**.
   A list of direct dialed numbers will appear.
3. For each direct dialed number, click on the blue link for the selected time of day: Open, Closed, Lunch, Special.
   The main frame will change to display the call routing screen.
4. Choose from the list where you want the calls at that time of directed to.
5. Select the **Save** button to save your changes.
6. Repeat steps 3-5 for each time of day and for each phone number.

Note: To ensure all calls are answered, make sure all DIDS have routing. If you are unsure, route DIDs to your auto attendant or receptionist.

How to enable voice mail

To enable voice mail for a user or location:

1. Select **Users and Locations** in the left menu.
2. Select the **Last Name** to select the user or location.
3. Check the **Voice Mail** check box in the Services section.
4. Select the **Save** button to save your changes.

Note: To enable voice mail for a user or location, there must be voice mailboxes associated with your business available for assignment. When you disable voice mail for a user or location, the associated voice mail box may not become available for assignment until your service provider has deleted the existing messages and recordings.

How to add a company speed dial number

The external directory/speed dial list is a list of commonly used external phone numbers. By creating this list of numbers, you make it convenient for individual users to program their memory keys and you give them the ability to view the list through the web interface.

To add a new entry to the External Directory/Speed Dial list:

1. Select **Company Settings** in the left menu.
2. From the **External Directory / Speed Dials** menu, select **Add an external directory (speed dial) entry**.
3. Type the contact name you want to assign to the entry in the **Name** field. This can be a person or a company associated with the phone number.
4. Type the phone number you want to assign to the External Directory/Speed Dial entry in the **Phone Number** field.
5. Type an email address for the External Directory/Speed Dial entry contact in the Email field (optional).
6. Select the **Save** button to save your changes.

Note: You can choose to map one of the keys on a user's telephone to dial this number or add it to one of your company phone key profiles.

How to set up account codes

Users can enter Account codes against incoming and outgoing calls to associate those calls with a particular client or account. Once entered, account codes are logged in the call records kept by your service provider and can be provided to you on request. You can enable and disable the Account Code feature for your business and specify the minimum and maximum valid account code length.

Note: To use the Account Code feature, a user must have a memory key programmed with the Account Code feature or be using a phone key profile that has been programmed with the Account Code feature.

To enable account code entry for your business:

1. Select **Business Details** in the left menu.
2. Scroll down to the **Account Codes** section.
3. Select the Enabled option in the **Account Codes** list.
4. Enter the minimum number of digits that an account code can contain in the Min Account Code Length field.
5. Enter the maximum number of digits that an account code can contain in the Max Account Code Length field.
6. Select the **Save** button to save your changes, or select the **Cancel** button to discard your changes.

Note: Minimum and maximum account code length cannot be less than 1 or greater than 20.

To disable account code entry for your business, follow these steps:

1. Select **Business Details** in the left menu.
2. Scroll down to the **Account Codes** section.
3. Select the Disabled option in the **Account Codes** list.
4. Select the **Save** button to save your changes, or select the **Cancel** button to discard your changes.

How to set up hold announcement

You can select the hold announcement used for callers to your business from a list of hold announcements provided by your service provider.

To configure the hold announcement for your business, follow these steps:

1. Select **Business Details** in the left menu.
2. Scroll down to the **Hold Announcement** section.
3. Select a hold announcement option from the **Hold Announcement** list.
4. Select the **Save** button to save your changes, or select the **Cancel** button to discard your changes.

Note: If you select the "System Default" option, the hold announcement selected by your service provider as a default announcement will be played.

How to add a broadcast group

Incoming calls to a broadcast group are routed to all group members at the same time causing all available members' phone lines to ring simultaneously. The phones stop ringing once the call has been answered or forwarded to call coverage.

To create a new broadcast group, follow these steps:

1. Select **Company Settings** in the left menu.
2. From the **Call Groups** menu, select **Add a broadcast group**.
3. Type the broadcast group name in the **Name** field**.**
4. Select an **Extension** for the broadcast group from the Extension list. The Extension list displays the next five available extensions for Call Groups. You can enter a different valid extension by selecting **Other** from the Extension list and typing the extension of your choice in the Text field.
5. Select the **Call Behavior** for the broadcast group. To configure the broadcast group calls to only ring on idle group member phones, select the "Only ring phones not in use" option. To configure the broadcast group calls to ring on all group member phones even if a group member is already on a call, select the "Ring all phones" option.

Note: When the "Ring all phones" option is selected, incoming broadcast group calls are still queued when group member phones are ringing because of a call to the same broadcast group.

6. Add names from the **Available Users** list to the **Members of Call Group** list for the new broadcast group (optional).
7. If you choose to lock users to the new call group, clear the **Allow Members to Leave Call Group** check box (optional).
8. Set up Call Coverage for the new broadcast group (optional).
9. Select the **Save** button to save your changes.

How to add a hunt group

Incoming calls to a linear hunt group are routed to each group member in turn, and always start with the first member listed. Each phone rings in turn for a designated number of rings. If the call is not answered, it is passed to the next available member.

Incoming calls to a circular hunt group are the same as a linear hunt group except that instead of the call always starting with the first member listed, calls rotate through each member, in order, ringing the individual following the hunt group member who received the previous call.

To add a new hunt group:

1. Select **Company Settings** in the left menu.
2. From the **Call Groups** menu, select **Add a hunt group**.
3. Type the hunt group name in the **Name** field**.**
4. Select an **Extension** for the hunt group from the Extension list. The Extension list displays the next five available extensions for call groups. You can enter a different valid extension by selecting **Other** from the Extension list and typing the extension of your choice in the Text field.
5. Select the **Call Behavior** for the hunt group. To configure hunt group calls to only ring on idle group member phones, select the "Only ring phones not in use" option. To configure the hunt group calls to ring on all group member phones even if a group member is already on a call, select the "Ring all phones" option.

Note: When the "Ring all phones" option is selected, incoming broadcast group calls are still queued when group member phones are ringing because of a call to the same hunt group.

6. Select the **Hunt Group Type** from the Type list. Circular Hunt Group is the default type.
7. Add names from the **Available Users** list to the **Members of Call Group** list for the new hunt group (optional).
8. From the **After 'x' rings send call to next member** list, select how many times you would like a hunt group member's phone to ring before the call is transferred to the next member (optional).
9. If you choose to lock users to the new call group, clear the **Allow Members to Leave Call Group** check box (optional).
10. Set up Call Coverage for the new hunt group (optional).
11. Select the **Save** button to save your changes.

How to add a Monitor group

Monitor Groups allow users to: monitor calls coming into a primary group member's extension; or they can allow the monitoring of the phone state and provide a speed dial to the monitored extension. In order for a user to monitor calls or phones a monitor group must be created. The extension that is to be monitored is the primary group member and the extensions that are monitoring the primary are secondary members.

To create a new Monitor group:

1. Select **Company Settings** in the left menu.
2. From the Call Groups menu, select **Add a Monitor group**.
3. Select the Monitor Groups **Primary User** from the list provided. A Monitor group takes the name and extension of the Monitor primary.
4. Add names to the **Members of Call Group** list for the new Monitor group (optional). (The Monitor primary is, by default, a member of the Monitor group and cannot be removed.)
5. Select the **Save** button to save your changes.

Note:: Secondary group members must have a memory key configured on their phone to be able to monitor another extension.

How to add a rollover group

Incoming calls to a rollover group are routed to the first idle phone in the group. Call coverage for a rollover group is the same as call coverage in a hunt group

To create a new rollover group:

1. Select **Call Groups** in the left menu.
2. Select **Add Rollover Group** from the Add list.
3. Type the rollover group name in the Name field**.**
4. Select an **Extension** for the rollover group from the Extension list. The Extension list displays the next five available extensions for Call Groups. You can enter a different valid extension by selecting **Other** from the Extension list and typing the extension of your choice in the Text field.
5. Add names to the **Members of Call Group** list for the new rollover group (optional).
6. If you choose to lock users to the new call group, clear the **Allow Members to Leave Call Group** check box (optional).
7. Set up Call Coverage for the new rollover group (optional).
8. Select the **Save** button to save your changes.

How to assign users to a call group

To associate users with an existing call group:

1. Select **Call Groups** in the left menu.
2. Select the **Name** to select a specific call group.
3. Select the user's name from the **Available Users** list.
4. Select the right directional arrow button to move the user into the **Members of Call Group** list. You can move as many users to the Members of Call Group list as you wish. To select multiple users, hold down the **Ctrl** key while selecting each name.
5. To remove members from the call group, select one or more members from the **Members of this Call Group** list and then select the left directional arrow button.
6. Select the **Save** button to save your changes, or select the **Cancel** button to discard your changes.

Note:

- By assigning users to a broadcast, hunt, or rollover group they are logged into the group and receive calls by default.
- When assigning users to a Monitor group, the Monitor secondary must configure a Monitor memory key to monitor for the group behavior to take effect.
- When assigning users to a hunt group, you must also configure the **After 'x' rings send call to next member** list to specify the number of times each users phone should ring before the call is passed to the next user.
- By unassigning a user from a call group, group behavior stops as soon as a call in progress is completed.
- Users can belong to multiple groups.

Getting further help

Help is available online whenever you log in to the web interface. Click on the Help option in the top right hand corner of your screen at any time to get more information.

Context sensitive help is available wherever you see the symbol: . Just click on the icon.

Contact your service provider if you are having difficulty resolving an issue.

Glossary

Auto Attendant - An automated system that directs incoming calls to the appropriate extensions.

Call Coverage - A feature of the *silhouette* system that provides coverage for a telephone user when they don't answer a call. It can be used to direct calls to an auto attendant, voice mail, and various other settings.

DID - Direct Inward Dialing. A 10-digit telephone number used for dialing into the *silhouette* environment from the outside public network.

LCD - Liquid Crystal Display. The users' IP phones contain a 20 character by 2 line alphanumeric display.

Location - A special kind of user associated with a telephone that is normally in a fixed location (such as a conference room phone).

Monitor Group. A type of call group that allows telephone users to see the status of another users lines or phone status.

PIN – Personal Identification Number. A unique number assigned to a user that acts as a password allowing them to log in to the Web Interface and phone.

3600 Hosted Key System - The product provided by Mitel to provide telephone service in a small business IP data network

tenant administrator - A user id that has the access rights required to perform administrative functions for a given tenant.

User - An individual with access to the web interface of the *silhouette* product. A user has an associated user id and a PIN number. From the perspective of a tenant, a user also has an associated telephone extension

User ID - A unique identifier associated with a user. For most users, this would be the same as their telephone extension.

Web Administration Interface – Allows a user to enter and modify information and functions that are programmable on the system. The user enters a defined URL to access the interface.