NEC

UNIVERGE® SV9100

UC Suite Admin Utility Manual

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TABLE OF CONTENTS

Chapter 1 Introduction to UC Suite Admin Utility

Section 1 Overview 1-1

Section 2 System Requirements 1-1

Section 3 Application Startup 1-2

Section 4 Multi-Level Access 1-2

Chapter 2 Admin Structure

Section 1 Admin Utility Main Dashboard 2-1

Section 2 Admin Utility Bar 2-3

Chapter 3 System

Section 1 Introduction 3-1

1.1 Extensions 3-1

1.1.1 Extension Edit 3-2

1.1.1.1 Extension Info 3-3

1.1.1.2 Voicemail 3-4

1.1.1.3 Buttons 3-5

1.1.1.4 Call Handling 3-10

1.1.1.5 Class of Service 3-11

1.1.1.6 Class of Restriction 3-12

1.1.2 Extension Copy 3-13

1.1.3 Extension Delete 3-13

1.1.4 Extension Search 3-14

1.2 PBX Date/Time 3-15

1.3 Trunks/Lines 3-16

1.4 Direct Dial Number Assignment 3-18

1.5 SMS Enabled DID's 3-19
1.6 Button Feature Keys 3-22
1.7 Class of Restriction 3-23
1.8 Class of Service 3-24
1.9 Day/Night Service Labels 3-25

Chapter 4 Users

Section 1 Overview 4-1

Chapter 5 Applications

Section 1 Description 5-1

1.1 Web Client Profiles 5-1
1.1.1 Defining Profiles 5-2
1.1.2 Assigning Profiles 5-5
1.1.3 Locking User Settings 5-6
1.1.4 UC Web Client Settings Assignment 5-6
1.1.5 Reset of Web Client Settings 5-7
1.2 UC Presence 5-8
1.3 Contact Center 5-9
1.3.1 Agents 5-9
1.3.2 Queues 5-11
1.3.3 Break Modes 5-13
1.3.4 Disposition Codes 5-14
1.3.5 Callback Request 5-15
1.4 Google Settings 5-17
1.5 Active Directory Settings 5-18

Chapter 6 Account Functions

Section 1 Overview 6-1

1.1 Settings Function 6-3

1.1.1 Login Credentials 6-3
1.1.2 Admin Accounts 6-4
1.1.3 Admin Privileges 6-5
1.2 View Transaction Log Function 6-8
1.3 Refresh from PBX Function 6-10
1.4 Sign Out Function 6-11
1.5 Help Function 6-12
1.6 About Function 6-12

LIST OF FIGURES AND TABLES

Figure 1-1 Login to Admin Utility 1-2
Figure 2-1 Main Dashboard 2-1
Figure 2-2 Main Dashboard – Toolbar 2-3
Figure 3-1 Extensions Screen 3-1
Figure 3-2 Extension Info Screen 3-3
Figure 3-3 Voicemail Screen 3-4
Figure 3-4 Buttons Screen 3-5
Figure 3-5 Edit Buttons Screen 3-7
Figure 3-6 Print Labels Screen 3-8
Figure 3-7 Print Labels – Adjust Location 3-9
Figure 3-8 Call Handling Screen 3-10
Figure 3-9 Class of Service Screen 3-11
Figure 3-10 Class of Restriction Screen 3-12
Figure 3-11 Extension Copy Screen 3-13
Figure 3-12 Extension Delete Screen 3-14
Figure 3-13 PBX Date/Time Screen 3-15
Figure 3-14 PBX Date/Time Settings 3-16
Figure 3-15 Trunks/Lines Screen 3-17
Figure 3-16 Direct Dial Number Assignment Screen 3-18
Figure 3-17 SMS Message 3-19
Figure 3-18 Read and Review LOA 3-19
Figure 3-19 Example of SMS Integration 3-20
Figure 3-20 Example of SMS Test Message 3-21
Figure 3-21 Button Feature Keys Screen 3-22
Figure 3-22 Class of Restriction – Assign Names Screen 3-23
Figure 3-23 Class of Service – Assign Names Screen 3-24
Figure 3-24 Day/Night Service Labels Screen 3-25
Figure 4-1 Users Screen 4-1
Figure 4-2 Example of Privileges Icons 4-2

Figure 4-3 Edit User Screen 4-3
Figure 4-4 Edit Contact Screen 4-4
Figure 4-5 More Contact Screen 4-5
Figure 4-6 Copy User Screen 4-6
Figure 5-1 UC Suite Web Client Profiles Screen 5-2
Figure 5-2 UC Suite Web Client Profiles – Applications Screen 5-2
Figure 5-3 UC Suite Web Client Profiles – Profile name 5-3
Figure 5-4 UC Suite Web Client Profiles – Executive Screen 5-4
Figure 5-5 UC Suite Web Client Profiles – Edit User 5-5
Figure 5-6 UC Suite Web Client Profiles – Edit Client User Settings 5-6
Figure 5-7 UC Suite Web Client Profiles – Reset Client Settings 5-7
Figure 5-8 UC Presence Screen 5-8
Figure 5-9 Agents Screen 5-9
Figure 5-10 Add Agents Screen 5-10
Figure 5-11 Queues Screen 5-11
Figure 5-12 Queue Name Column 5-12
Figure 5-13 Break Modes Window 5-13
Figure 5-14 Example of Disposition Codes 5-14
Figure 5-15 Example of Callback Screen 5-15
Figure 5-16 Example of Google Settings 5-17
Figure 5-17 Example of Active Directory 5-18
Figure 6-1 Account Functions Screen 6-2
Figure 6-2 Settings Screen 6-3
Figure 6-3 Login Credentials Screen 6-4
Figure 6-4 Admin Accounts Screen 6-5
Figure 6-5 Admin Privileges Screen 6-7
Figure 6-6 Settings Menu 6-8
Figure 6-7 Example of View Transaction Log 6-9
Figure 6-8 Refresh from PBX Screen 6-10
Figure 6-9 Initiate Refresh from PBX 6-11
Figure 6-10 Admin Welcome Screen 6-12
Figure 6-11 About Screen 6-13

Introduction to UC Suite Admin Utility

Chapter 1

SECTION 1 OVERVIEW

The Admin utility is a browser-based application that is installed as part of the standard UC Suite installation. The Admin utility provides an easy method to manage the UC Suite user settings and naming the Contact Center resources.

With UC Suite 5.5 and higher, the Admin Utility is expanded with a main dashboard that displays the number of UC Users, Contact Center Agents and Queues, Extensions, and DIDs assigned in the system, as well as a summary of several of the user licenses available and how many are in use.

The UC Suite 5.5 Admin Utility also supports a two-tier login scheme. The Login scheme will continue to use login credentials that are setup in system programming within Program 90-02. Users that login with an Installer Level account have access to all features, including the ability to limit the access of lower level account users. Users that login with the System Administrator Level account will have access to most areas of the application, as limited by the Installer Level user. This two-tier strategy allows system installers to use the Installer Level account access to limit the features available to the end user administrator. Programming areas that can be enabled/disabled by the Installer Level account include features that can be assigned to telephone buttons and assigning names to the Day/Night modes.

Administrators can use the Admin Utility to manage Extensions, System Data and Time, DID Assignment, and assign names to Classes of Service and Toll Restriction classes. These names are only used within the Admin Utility to help the user better identity the purpose and intended use for each class.

SECTION 2 SYSTEM REQUIREMENTS

The following are the system requirements for the Admin Utility.

- ❏ UC Suite 5.0 or higher
- ❏ Internet Browser: Mozilla® Firefox® 50, Google Chrome™ 55 and Microsoft Edge™ 38
- ❏ SV9100 - CPU v7.00.51 or higher
- ❏ Other than the Contact Center, InControl or UC Suite licenses required for your application, no additional licenses are required for the Admin Utility

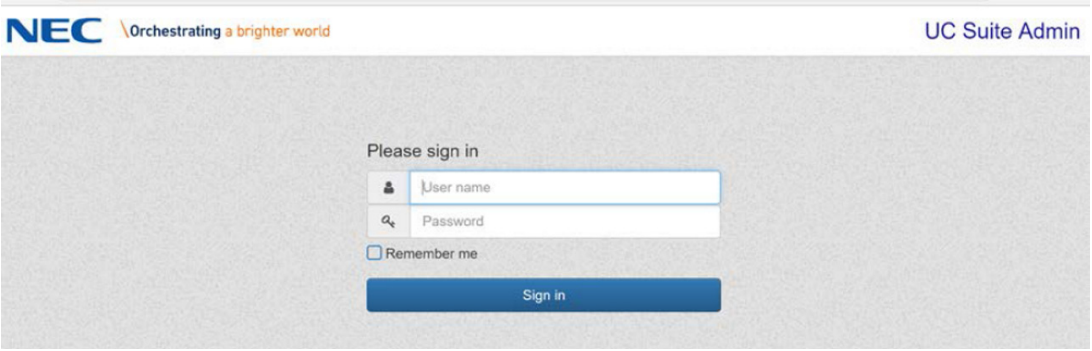
SECTION 3 APPLICATION STARTUP

Access the Admin utility by opening a browser and entering the URL for the UC Web Server followed by 'Admin'. The following is an example URL:

https://UCApplicationServer/Admin

The application will initially display the login page, as shown in the following example.

Figure 1-1 Login to Admin Utility



With UC Suite 5.1, to login to Admin, the user must enter a User Name and Password as defined in Program 90-02. The Account must be setup as either Installer Level, System Administrator A or System Administrator B.

To maintain consistency in the configuration database, only one user can be logged into the Admin utility at a time.

After a successful login, the user will be able to access the configuration settings as described in the following sections.

SECTION 4 MULTI-LEVEL ACCESS

With UC Suite 5.5 and higher, the login scheme for the Admin utility will be updated to support a two-tier login scheme. The Login scheme will continue to use login credentials set up in system programming within Program 90-02.

Users that login with an Installer Level account will have access to all functionality, including the ability to limit the areas that lower level account users will access.

Users that login with the System Administrator Level account will have access to most areas of the application, as limited by the Installer Level user.

This two-tier strategy allows system installers to use the Installer Level account access and limit features the end user administrator can access. Programming areas that can be enabled/disabled by the Installer Level account include the following:

- ❏ Features that can be assigned to telephone buttons
- ❏ Assigning names to the Day/Night modes

There are currently no limitations that can prevent PCPro, WebPro and UC Admin users from editing the system database at the same time.

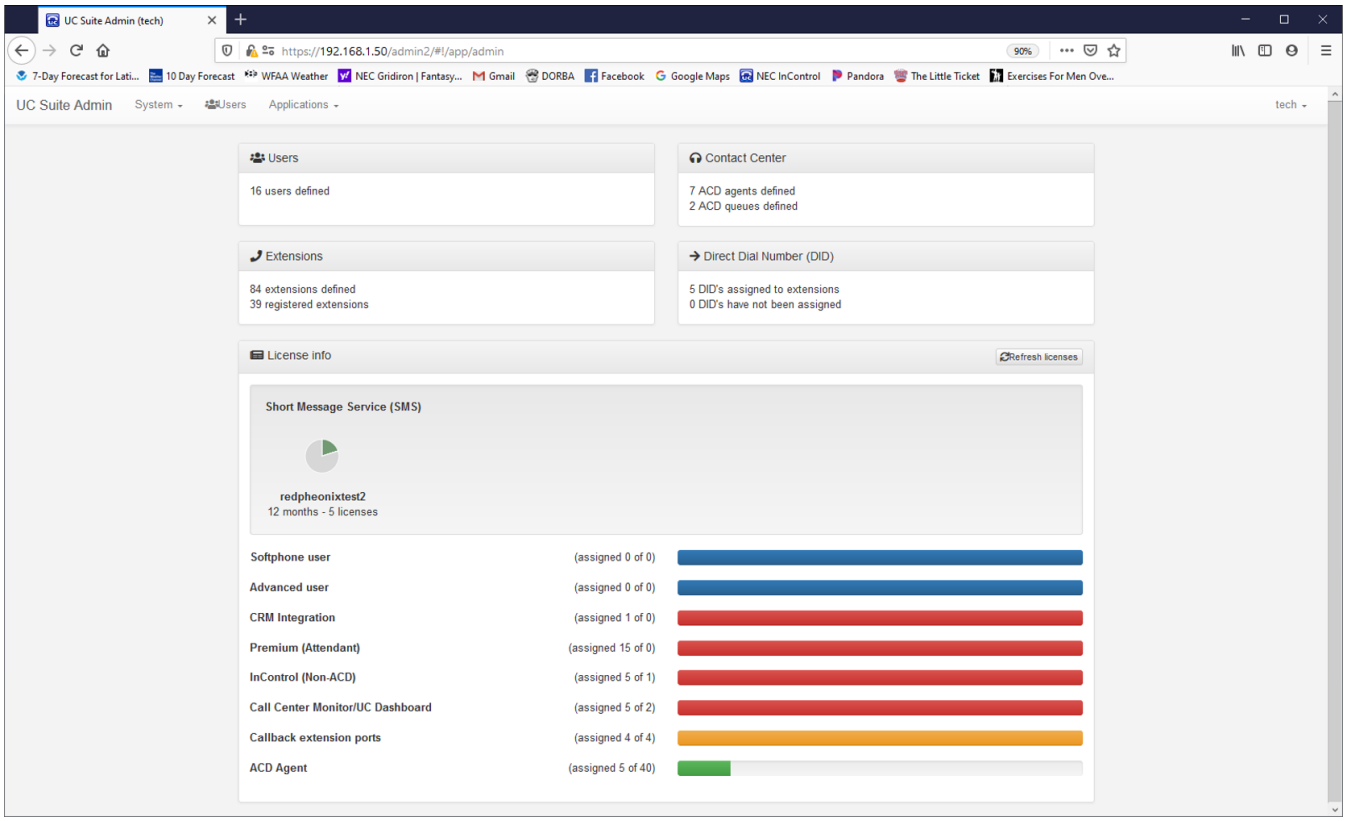
Admin Structure

Chapter 2

SECTION 1 ADMIN UTILITY MAIN DASHBOARD

When a user logs into the Admin Utility, the main dashboard user interface is displayed. An example of the Admin Utility main dashboard is provided below.

Figure 2-1 Main Dashboard



The following categories are displayed on the dashboard home page:

- **Users** – Displays the number of UC Users defined in the system.
- **Contact Center** – Displays the number of ACD Agents and ACD Queues defined in the system.
- **Extensions** – Displays the number of extensions defined in the system and how many of those extensions are actually registered and working.

- **Direct Dial Numbers (DID)** – Displays the number of DID's assigned to extensions and the number of DID's defined but not assigned to an extension.
- **License Info** – Displays a summary of user license categories and their use. Each entry in this section shows the total number of licenses loaded in the SV9100 and the number of users that have been assigned to use that type of license. The bar graph provides an indication of the ratio between total licenses and assigned licenses. A red line indicates that more users have been assigned that license type than there are available licenses. The yellow line indicates that 50% to 100% of the available licenses have been assigned. A green line indicates that less than 50% of the licenses have been assigned to users.

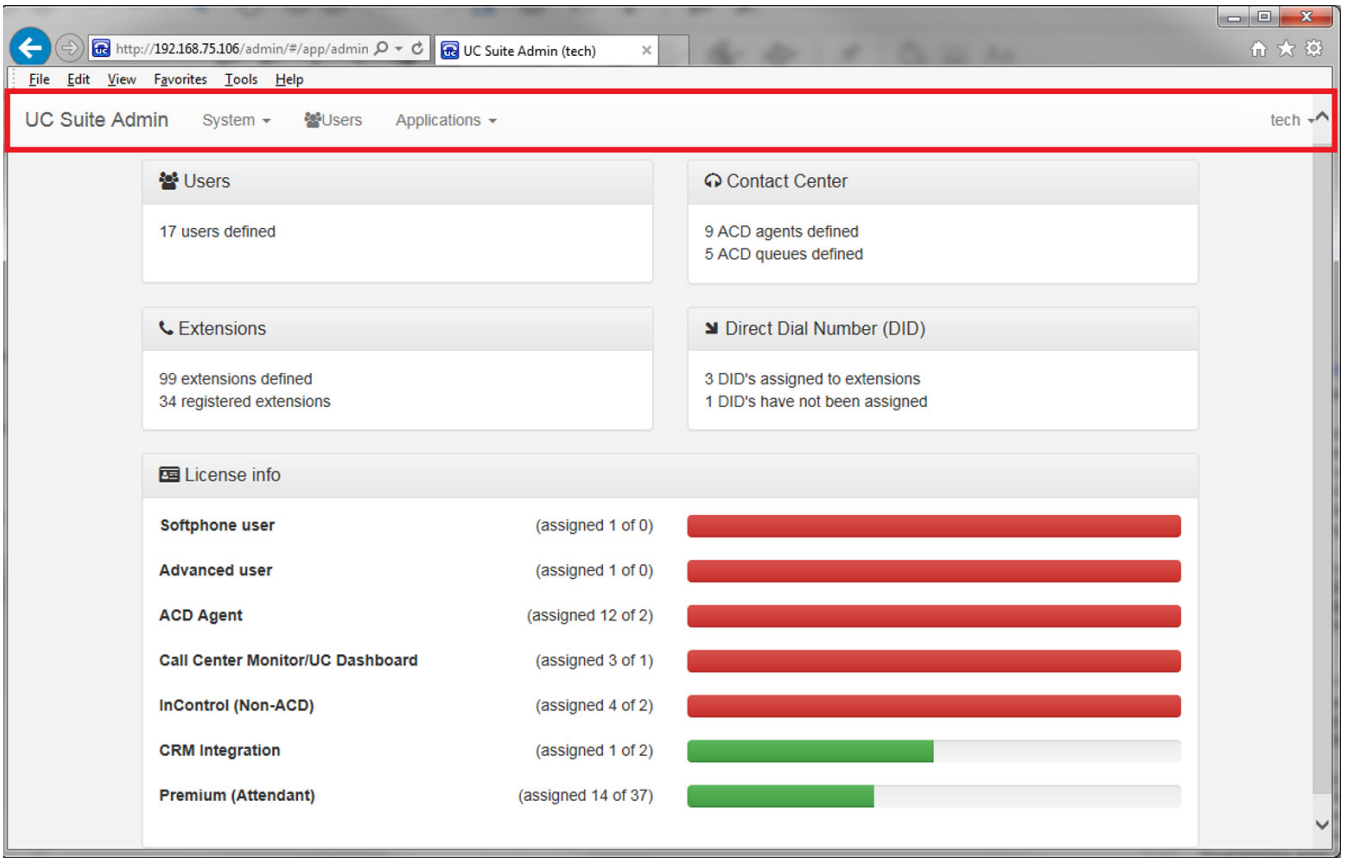
With UC Suite 7 or higher, a summary of the SMS subscriptions for the site are shown. The following describes how the chart is divided to show subscription status:

- Gray - available unassigned licenses.
- Green - licenses that are active and assigned.
- Yellow - licenses that have been activated but are currently unassigned.
- Red - expired licenses or licenses that are in an error state.

SECTION 2 ADMIN UTILITY BAR

The toolbar at the top of the page also provides access to each of the programming categories.

Figure 2-2 Main Dashboard – Toolbar



Access to the following categories is provided through this main menu.

- System
  - Extensions
  - PBX Date/Time
  - Trunks/Lines
  - Direct Dial Number Assignment
  - SMS Enabled DID's
  - Button Feature Keys
  - Class of Restriction
  - Class of Service

- Day/Night Service Labels

- Users

- Applications
  - UC Suite Web Client Profiles
  - UC Presence
  - Contact Center – Agents
  - Contact Center – Queues
  - Contact Center – Break Modes
  - Contact Center – Disposition Codes
  - Contact Center – Callback
  - Google™ Settings
  - Active Directory Settings

Program settings available in each category are defined in the following chapters.

To return to the Main Dashboard, click on **UC Suite Admin** on the far left side of the toolbar from anywhere in the Admin Utility.

System

Chapter 3

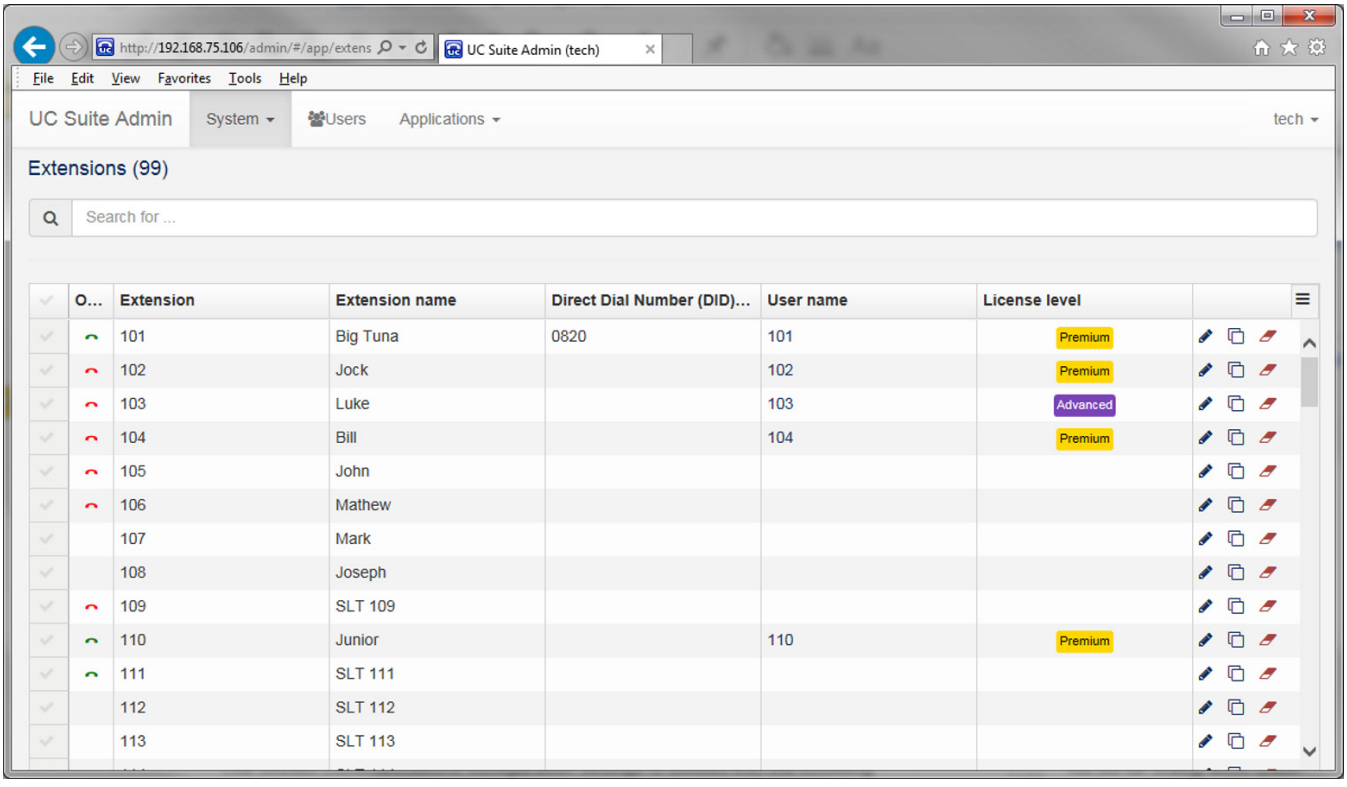
SECTION 1 INTRODUCTION

The following sections describe the values that can be modified under the System Programming category:

1.1 Extensions

Selecting the **Extensions** view under the System menu provides a list of all extension numbers that have been defined in the system. The following image shows an example of the Extension view.

Figure 3-1 Extensions Screen



The Extension table displays the following information for each extension:

- Online Status
- Extension Number

- Extension Name
- Direct Dial Number
- UC User Name
- License Level

The Extension view allows individual entries to be modified. On the right side of each row are controls to initiate Edit, Copy and Delete functions.

The Extension view also provides a Search function at the top of the form. These features are described below.

1.1.1 Extension Edit

Selecting the Edit function opens a menu allowing the user to update settings associated with the selected Extension. The edit function uses the pencil icon on the far right of the extension row. Settings are grouped into the following categories:

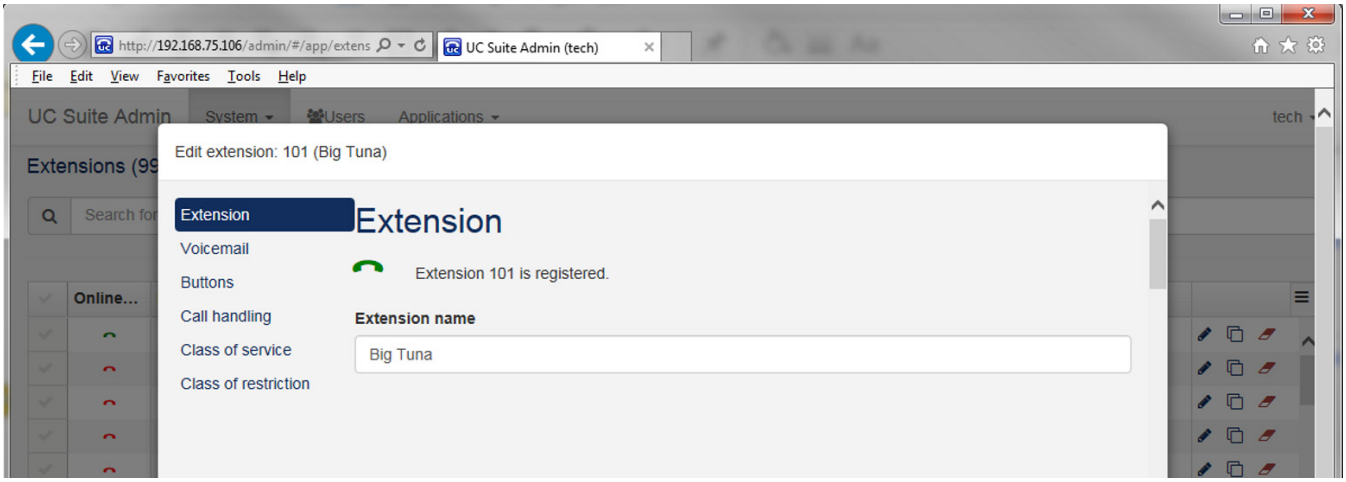
- Extension Info
- Voicemail
- Buttons
- Call Handling
- Class of Service
- Class of Restriction

Each of these categories are described in the following sections.

1.1.1.1 Extension Info

The Extension Info settings allow the user to update general settings related to the extension. The following image shows an example of the Extension Info settings.

Figure 3-2 Extension Info Screen



This area shows the current activity status for the selected extension. In the previous image, the status shows Extension 101 is on-line with a green handset and extension 101 has a terminal registered in the system.

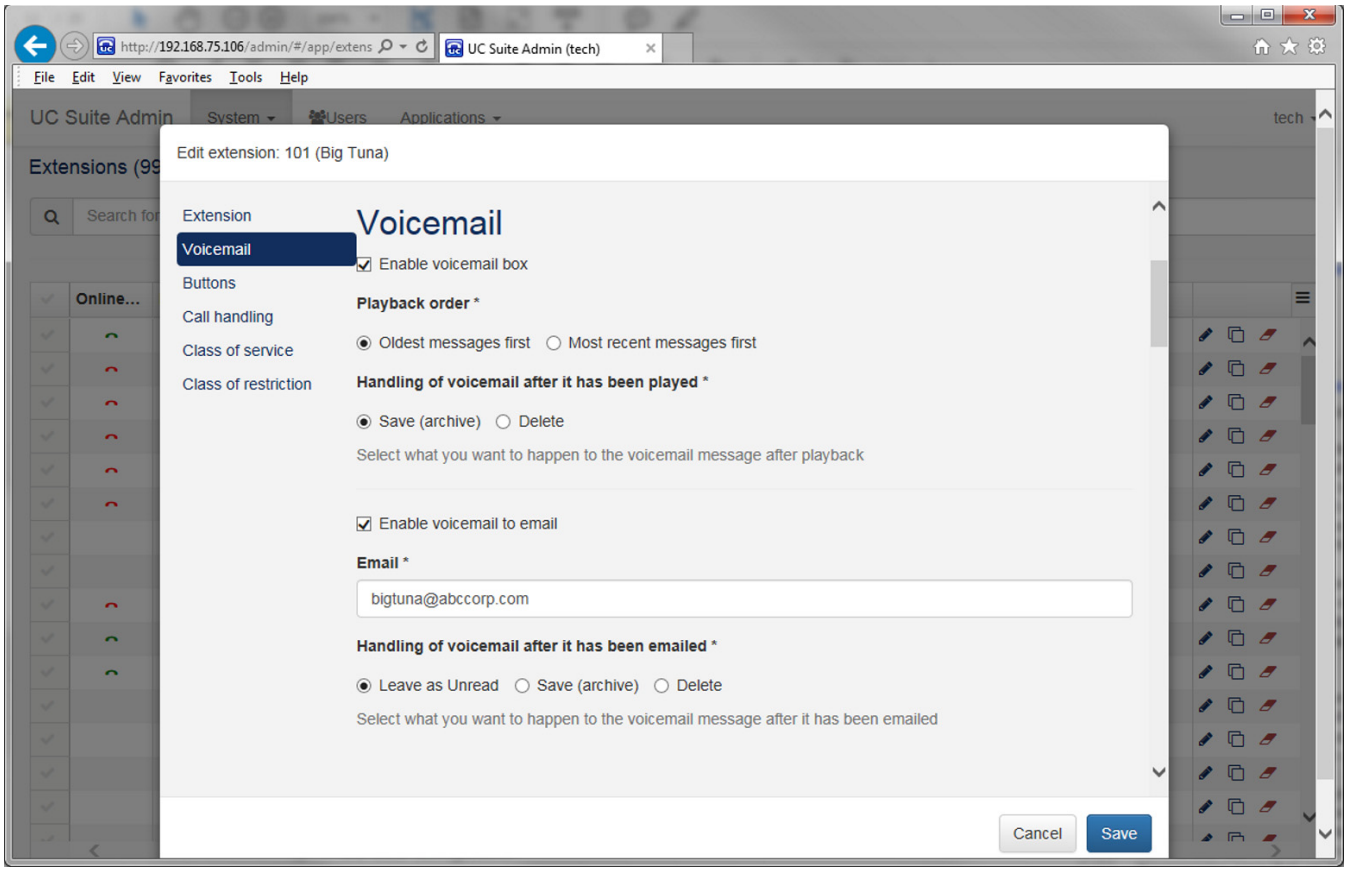
If an extension has not been online, the status will show the phone is off-line with a red handset. If an extension does not have a terminal registered, it will show Not Registered and will have no handset icon displayed.

The Extension Name field allows the user to update the Name field associated with the extension. This field updates Program 15-01-01 and the text will be displayed within the phone system to identify this extension.

1.1.1.2 Voicemail

The Voicemail area allows the user to customize voicemail access settings for the selected extension user. These settings will update Program 47-02 in the SV9100. The following image shows an example of the Voicemail settings.

Figure 3-3 Voicemail Screen



The following settings are available within the Voicemail section of the menu:

When checked, the **Enable voicemail box** setting assigns a voicemail box for this extension.

The **Playback Order** option determines the order that messages will be played back for this voicemail user.

The **Handling of voicemail after it has been played** option determines whether messages are deleted after being played or archived.

The **Enable voicemail to email** option allows voicemail messages to be delivered as an attachment to an email messages. When this is enabled, the Email field is present. When this is disabled, the Email field is not present.

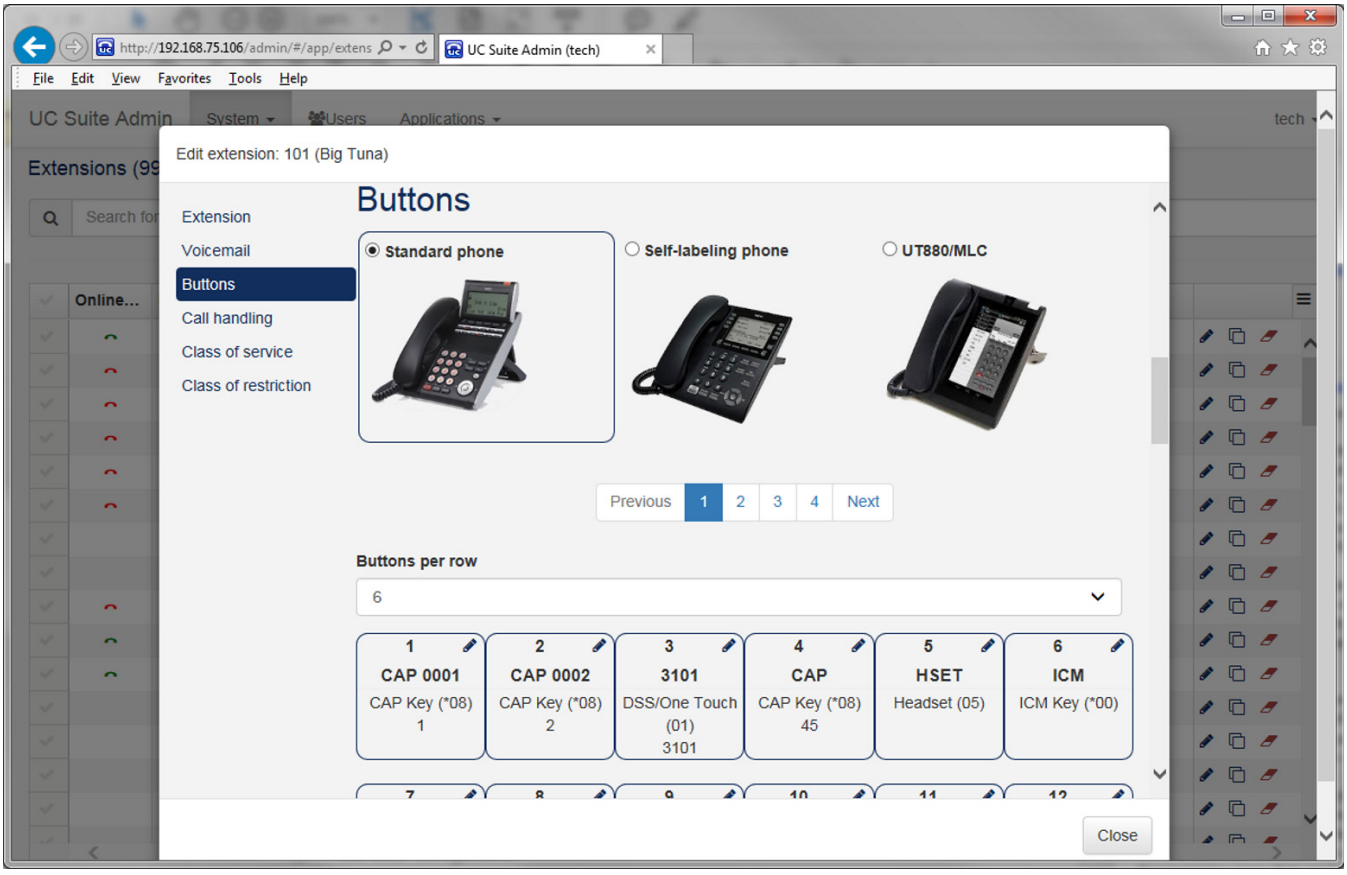
The **E-Mail setting** specifies the email address to send the voicemail messages to.

The **Handling of voicemail after it has been emailed** option determines whether voicemail messages are kept as New messages, archived, or deleted after the e-mail message has been sent.

1.1.1.3 Buttons

The Buttons section allows the user to assign features to each of the buttons on the telephone. The user can select the style of telephone that is installed at this extension so that the button layout within the menu is similar to the actual phone device. The following image shows an example of the Button area.

Figure 3-4 Buttons Screen



The user can select the button layout from three different styles of desksets: Standard Phone, Self-labeling phone and the UT880/MLC. Each style will change the button layout within the menu to represent the button orientation of the actual phone device.

When the Standard Phone option is selected, the user can specify the number of buttons in each row on the phone device. The drop-down menu allows the user to select between 4, 6 or 8 buttons. As this value is updated, the layout of the buttons within the menu are adjusted.

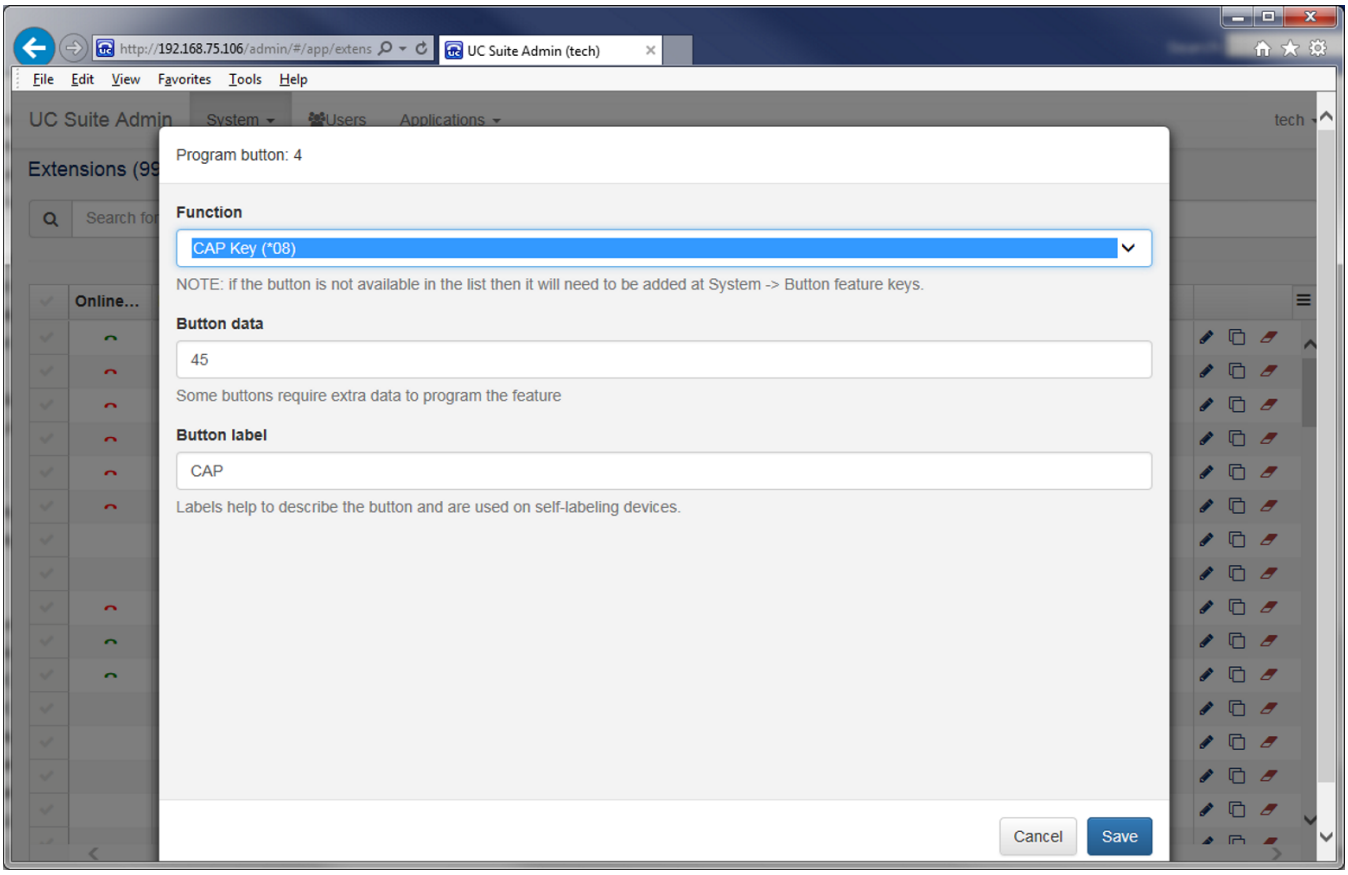
When the Self-Labeling device is selected, the button images are organized in a vertical style, with 4 buttons in each of two columns to match the layout of the device.

When the UT880 phone is selected, the buttons images will be displayed in a vertical arrangement of 8 buttons.

The page control can be used to move between different rows and pages of buttons.

Clicking on the Edit icon within a button allows the user to edit the features for that button. The following image shows an example of the button edit menu.

Figure 3-5 Edit Buttons Screen



The **Function** setting is a drop-down list showing the features that can be assigned to the selected button. This list includes all of the functions enabled within the **System > Button** Feature Keys in the Admin application.

The **Button Data** field allows the user to enter any additional parameter required for the selected function.

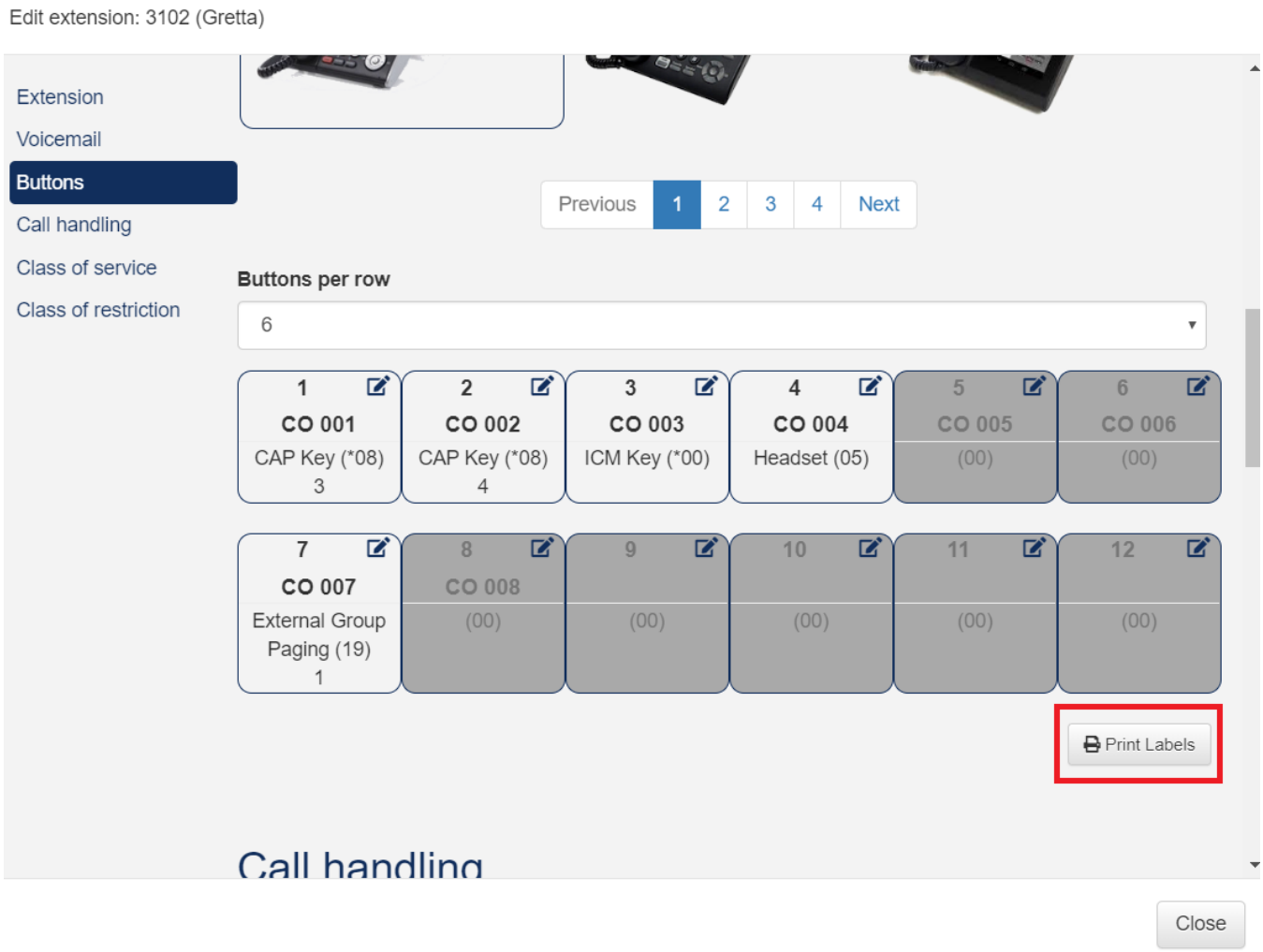
The **Button Label** field allows the user to specify the text that will be displayed for this button on Self Labeling phones, Program 15-20.

With UC Suite 6.5 or higher, the Admin Utility has two new enhancements. The first allows the printing of labels in button programming, similar to the functionality in PhonePro.

Selecting the **Print Labels** button will open a submenu that lists the different output options available. These options are the same as provided within PhonePro.

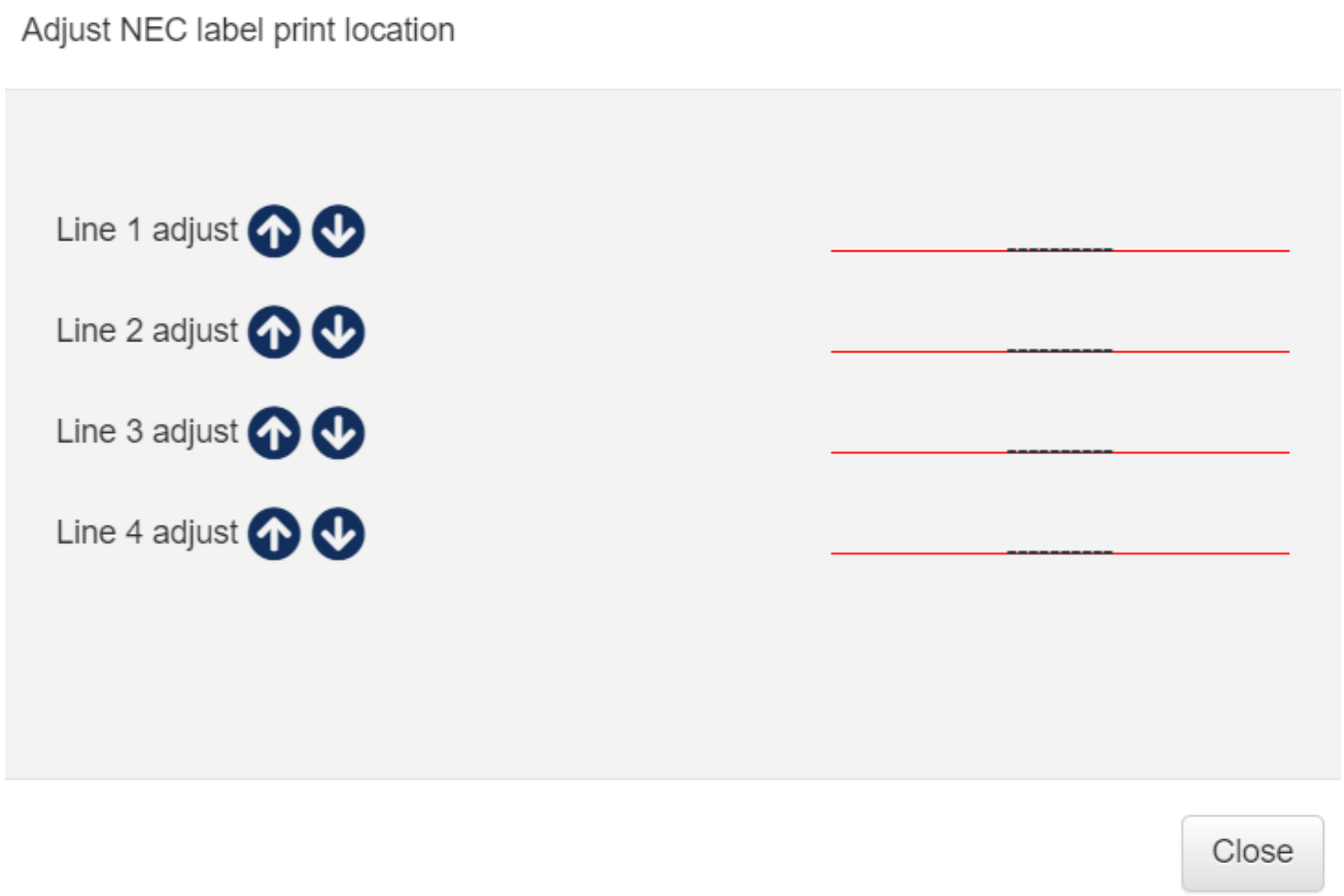
Selecting one of the **Print** options will open the default Print dialog allowing the user to select the destination printer and specify other print parameters.

Figure 3-6 Print Labels Screen



The **Adjust NEC label print location** option allows the user to adjust the position of the labels to better align with their form. When this option is selected, the following menu will be displayed. The arrow keys allow the user to adjust the vertical position of each line to improve the alignment of the printed text.

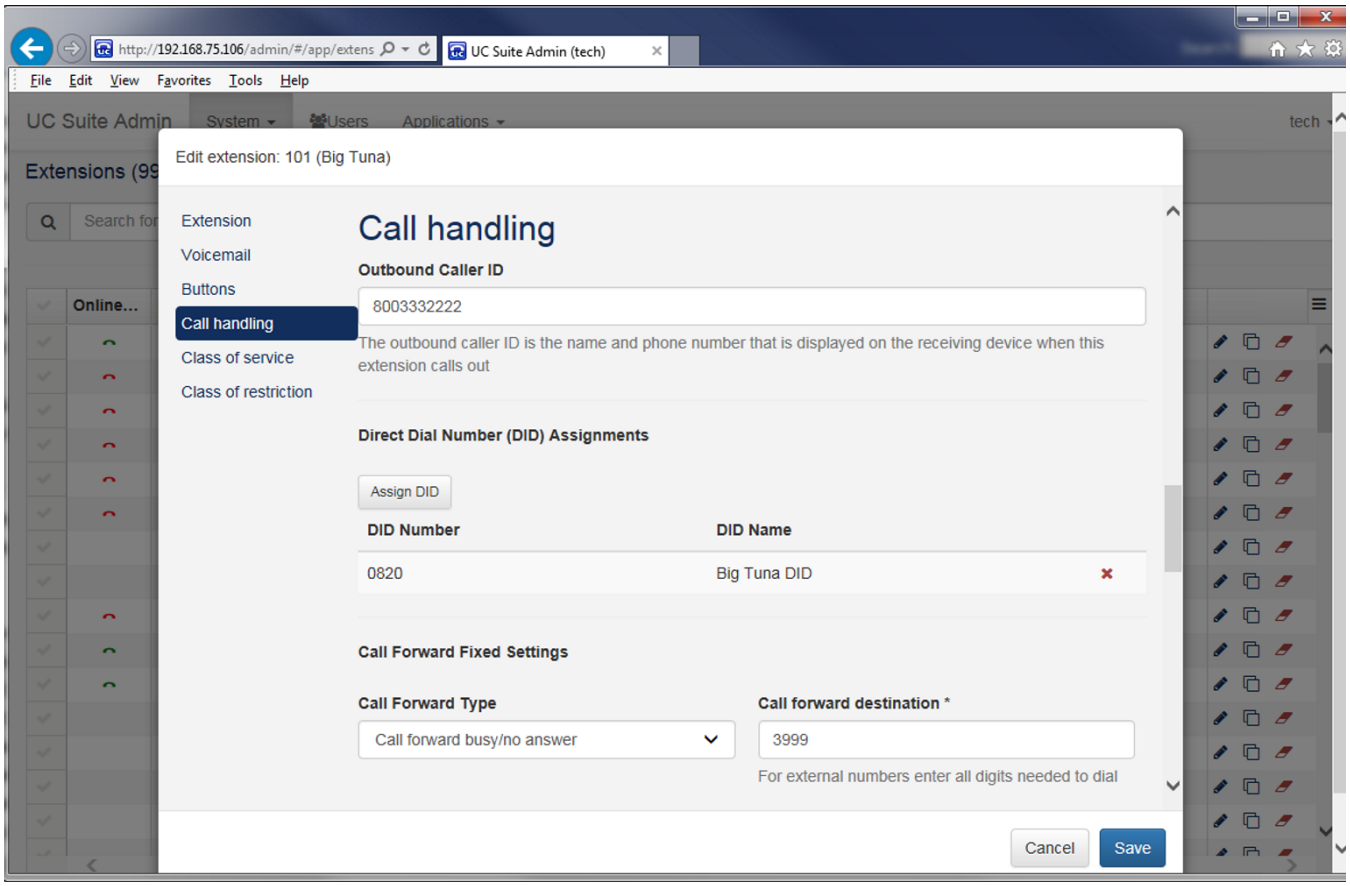
Figure 3-7 Print Labels – Adjust Location



1.1.1.4 Call Handling

The Call Handling section allows the user to define special call handling settings for the extension. The following image shows an example of the Call Handling area.

Figure 3-8 Call Handling Screen



The **Outbound Caller ID** setting allows the user to specify the identifying text that will be displayed when the extension dials numbers outside of the SV9100. This field is associated with Program 21-13-01.

The **Direct Dial Number Assignments** area displays the DID numbers that are associated with an extension. To remove a DID assignment, the user will click on the red X next to the number. To assign an additional DID to the extension, the user will click on the Assign DID button and then select an available DID number. This field is associated with Program 22-11.

The **Call Forward Fixed Settings** allows the user to define the call forwarding operation that will be setup by default for this extension. This is associated with Program 24-09.

The **Call Forward Type** options include:

- ❑ No Call Forward
- ❑ Call Forward All Calls
- ❑ Call Forward Busy/No Answer
- ❑ Call Forward Both Ring
- ❑ Call Forward No Answer
- ❑ Call Forward Busy

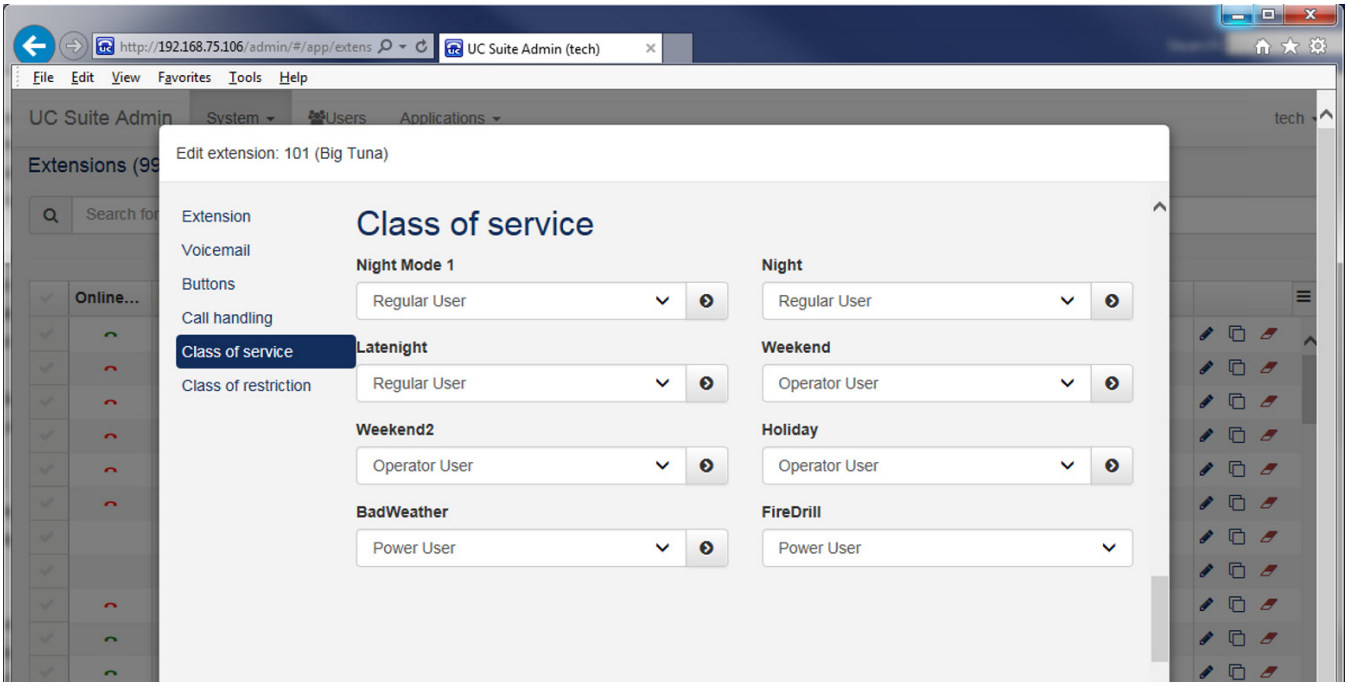
The **Call Forward Destination** field specifies the target number for the selected Call Forward operation.

1.1.1.5 Class of Service

The Class of Service section allows the user to assign the class of service for the extension during each of the day/night time periods. This is associated with Program 20-06.

The following image shows an example of the Class of Service area.

Figure 3-9 Class of Service Screen



This menu has an entry for each of the eight day/night time periods. A different class of service can be specified for each time. The drop-down selector for each entry displays the Class of Service options that were setup in the **System > Class** of Service.

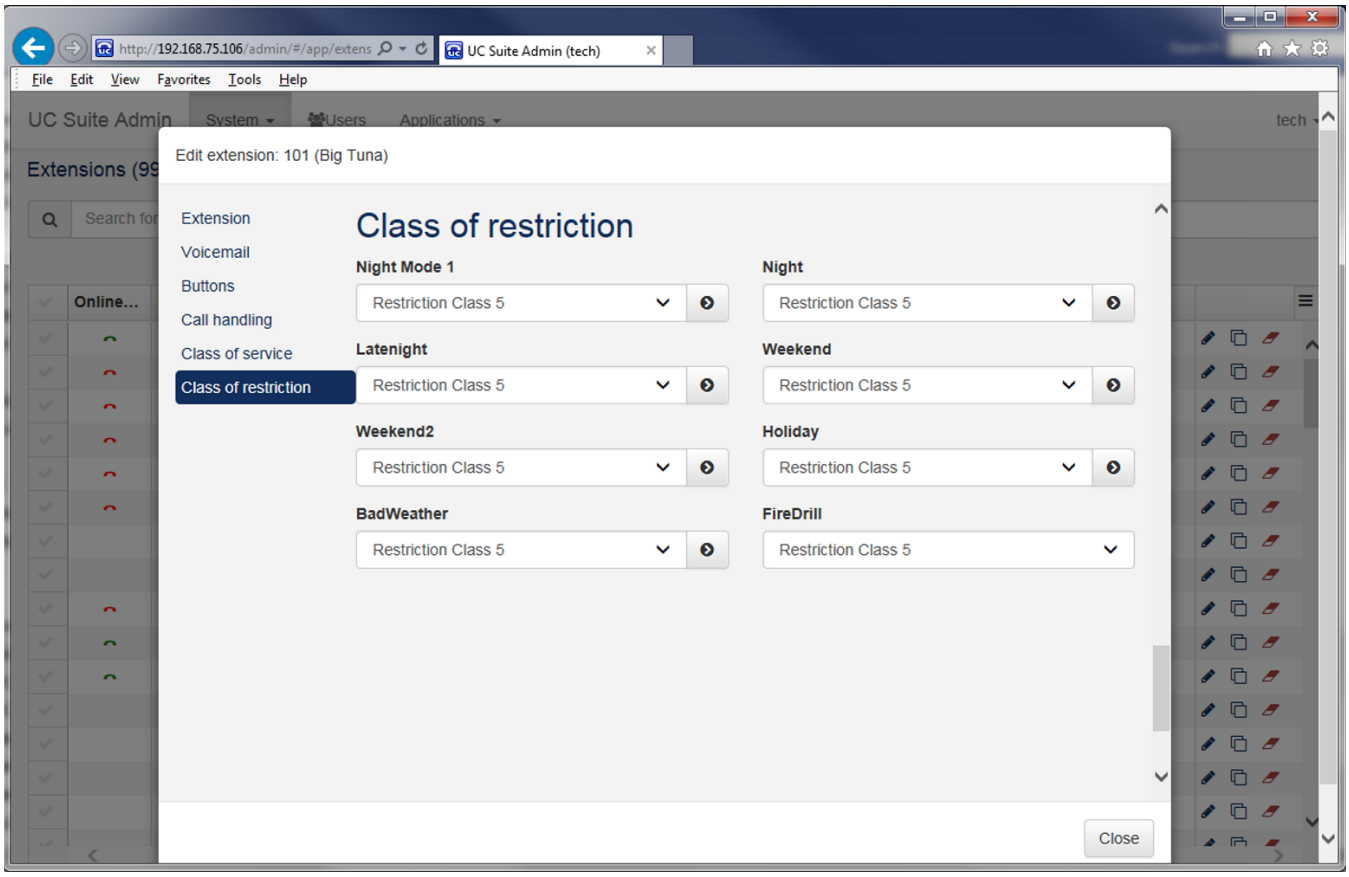
Clicking on the right arrow within an entry will copy that entry to all of the remaining time periods on the menu.

1.1.1.6 Class of Restriction

The Class of Restriction section allows the user to assign the Toll Restriction Class for the extension during each of the day/night time periods. This is associated with Program 21- 04.

The following image shows an example of the Class of Restriction area.

Figure 3-10 Class of Restriction Screen



This menu has an entry for each of the eight day/night time periods. A different class of toll restriction can be specified for each time. The drop-down selector for each entry displays the Class of Restriction options that were setup in **System > Class** of Restriction.

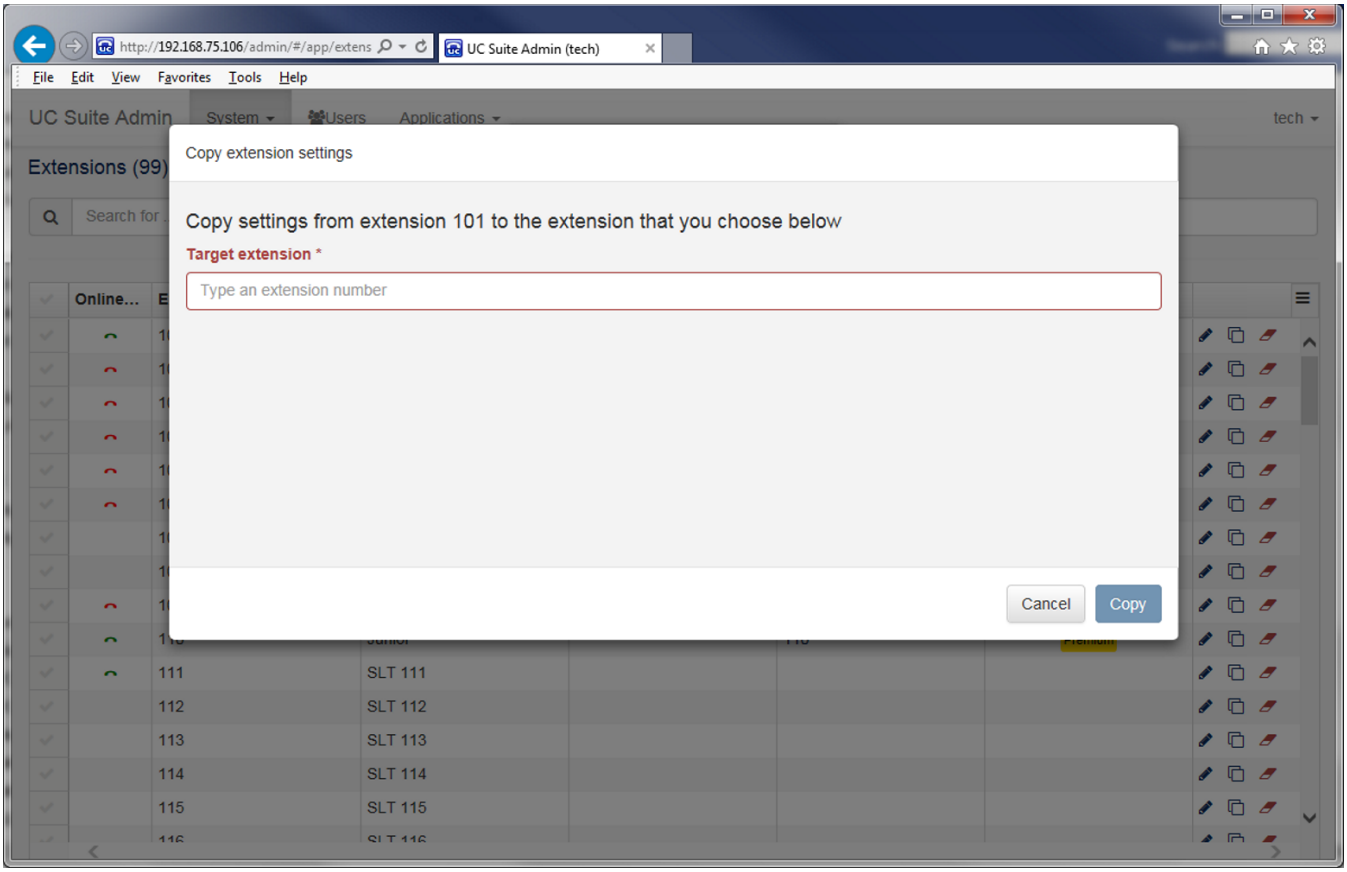
Clicking on the right arrow within an entry will copy that entry to all of the remaining time periods on the menu.

1.1.2 Extension Copy

Selecting the Copy function opens up menu that allows the user to copy settings from the selected extension onto another extension. The Copy function is the stacked paper icon on the far right of the extension row.

The following image shows an example of the Copy menu.

Figure 3-11 Extension Copy Screen



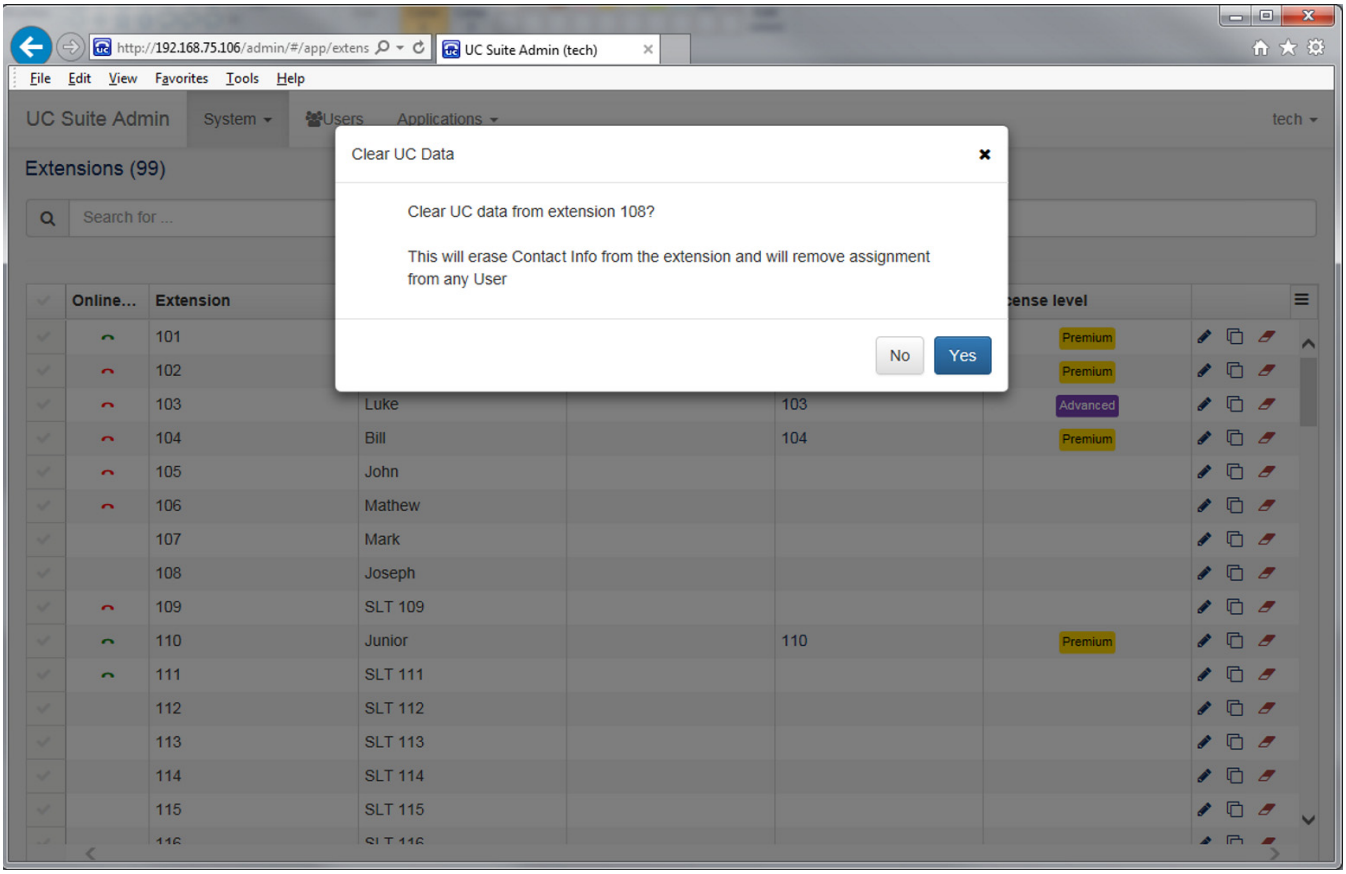
The **Target Extension** field is used to specify the destination for the copy operation. Only extensions currently defined within the phone system are valid. After entering the target extension, clicking on the **Copy** button will perform the copy operation. Clicking on the **Cancel** button closes the form without performing the copy.

1.1.3 Extension Delete

Selecting the Clear function opens a menu that allows the user to remove UC settings for the selected extension. The Delete function is the red eraser icon on the far right of the extension row.

The following image shows an example of the Delete menu.

Figure 3-12 Extension Delete Screen



Clicking on **Yes** will remove the extension assignments. Clicking on **No** closes the menu without clearing the extension settings.

1.1.4 Extension Search

The Search function provides a convenient method for locating an extension from within the list. The user can enter either alphabetic or numeric strings to search the extension list. The Search operation will look for matching strings within the following fields:

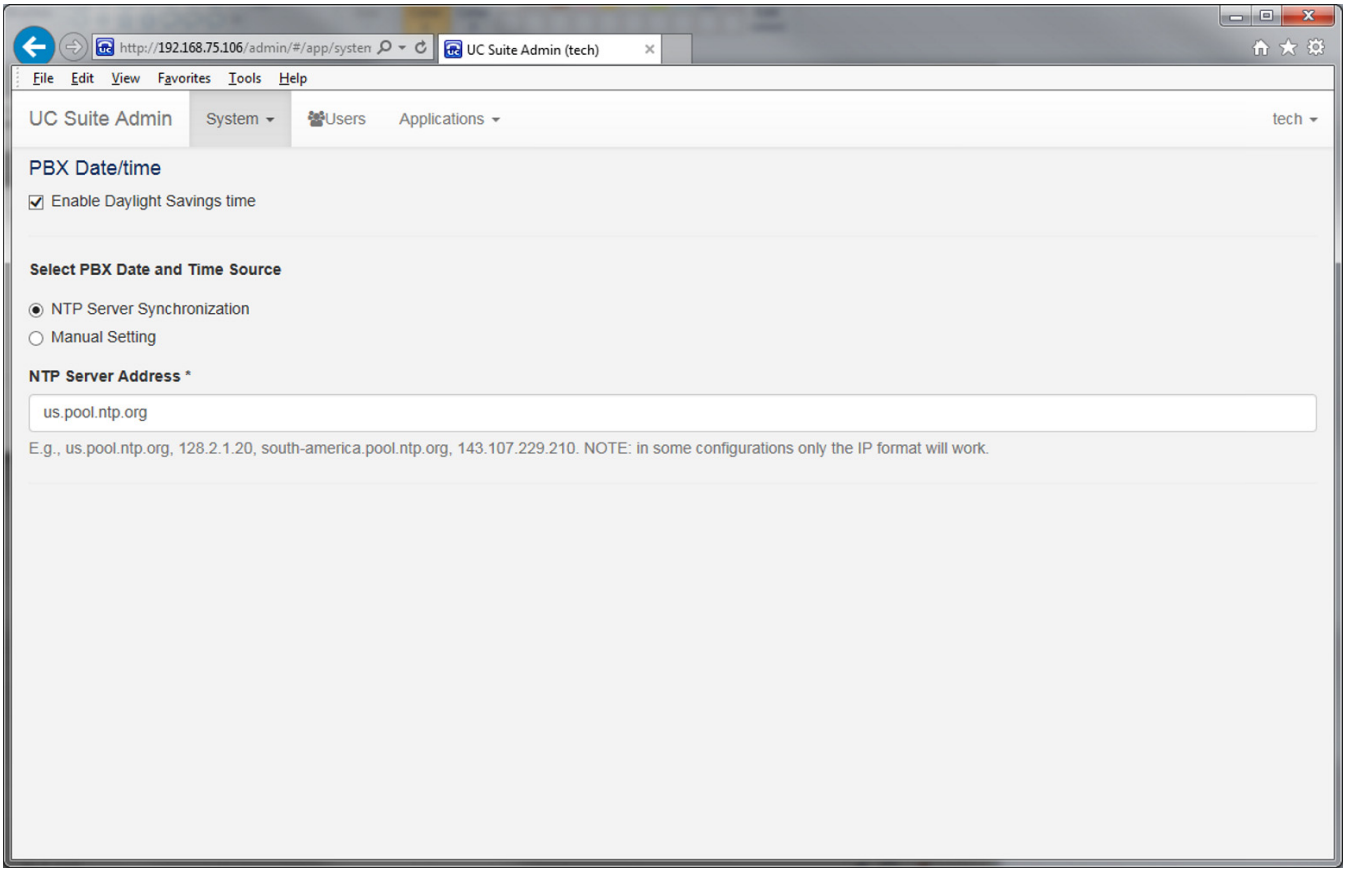
- Extension
- Extension Name
- Direct Dial Number (DID)
- UC User Name

The list will be filtered to only display entries that match the target string. Clearing the Search field will remove the filter and display all of the Extension list entries.

1.2 PBX Date/Time

Selecting the PBX Date/Time option under the System menu allows the user to change the SV9100 date and time information. The following image shows an example of the menu that will be displayed when the user selects the PBX Date/ Time option.

Figure 3-13 PBX Date/Time Screen



This menu allows the user to update the following system settings:

Enable Daylight Savings Time

Checking this box will enable the system time to automatically be adjusted for Standard and Daylight Savings time. This is associated with Program 10-24-01.

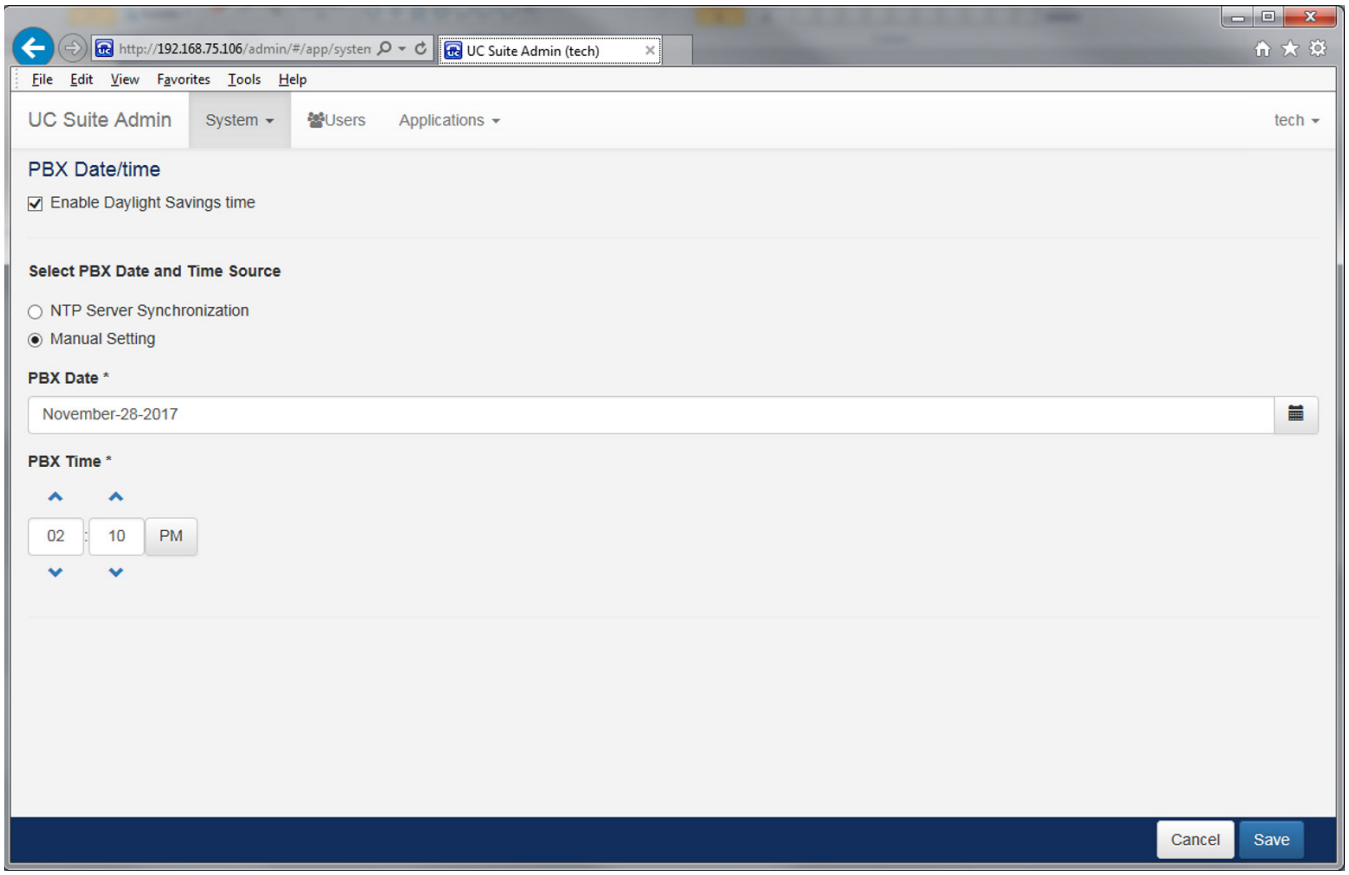
Select PBX Date and Time Source

This option allows the user to select between synchronizing the system time to an NTP server or manually setting the time.

If **NTP Server Synchronization** is selected, the user can specify the address of the NTP Server to use. This is associated with Program 90-56.

If **Manual Setting** is selected, the menu will show controls allowing the user to select the current date and time. The following image shows an example of these controls.

Figure 3-14 PBX Date/Time Settings

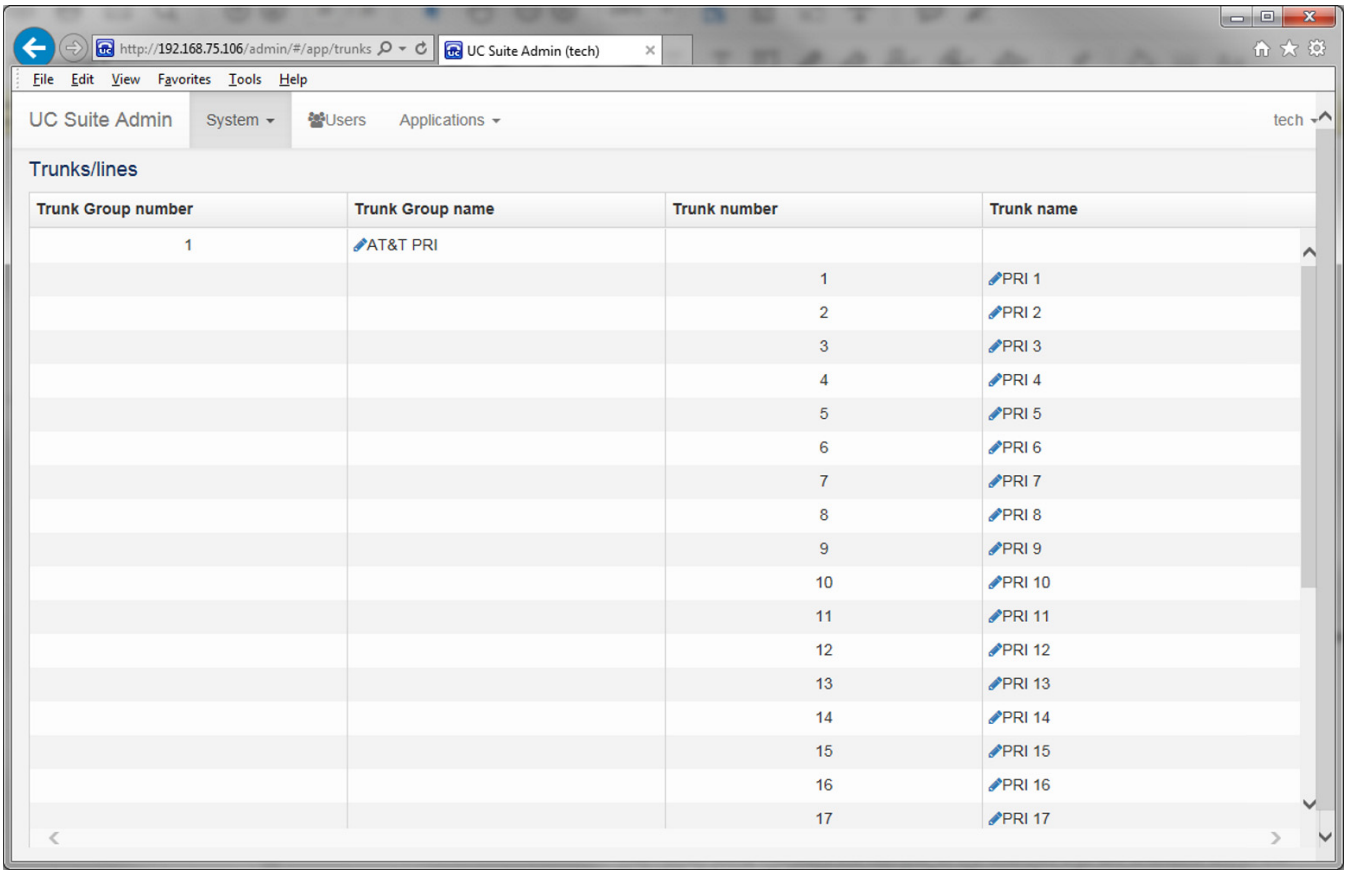


1.3 Trunks/Lines

Selecting the Trunks/Lines option under the System menu allows the user to assign names to defined trunk groups and individual trunks. From this menu, the user has the ability to assign a name to the Trunk Groups and Individual Trunks. Clicking on the Edit icon changes the name field to an editable field, allowing the user to modify the text. These names are then displayed to identify the trunk groups and trunks within reports generated by the InControl application.

The following image shows an example of the menu that will be displayed when the user selects the Trunks/lines option.

Figure 3-15 Trunks/Lines Screen

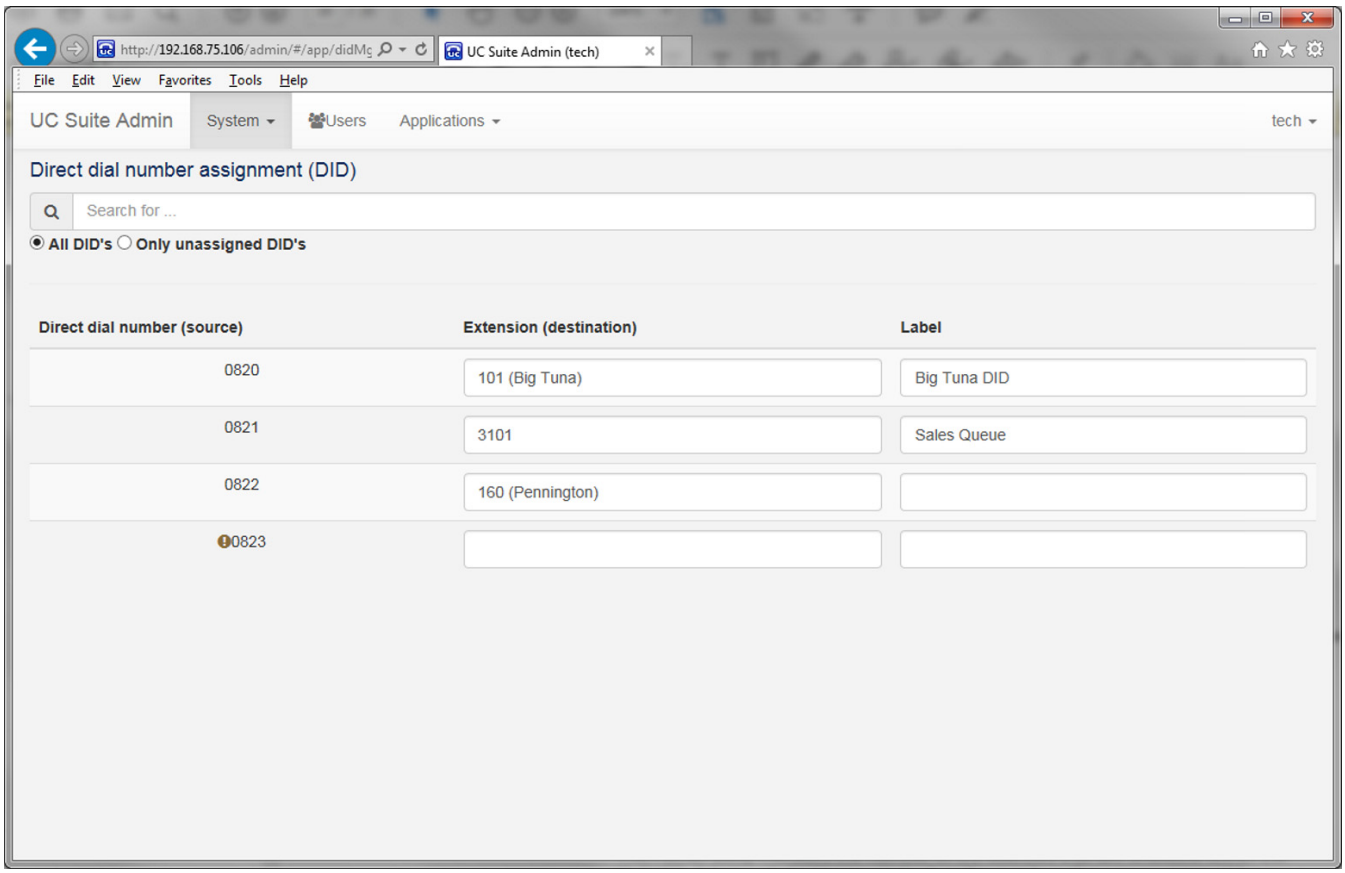


This feature is unchanged from the UC Suite R5 Admin utility.

1.4 Direct Dial Number Assignment

Selecting the Direct Dial Number Assignment option from the System menu allows the admin user to assign DID numbers to extensions. The following image shows an example of the menu that is displayed when this feature is selected.

Figure 3-16 Direct Dial Number Assignment Screen



The table shown in this menu lists all of the direct dial numbers programmed in the system with their associated extension and number label. This is associated with Program 22-11.

The Search bar on this menu allows the user to quickly search for an entry in the table by number, extension or label.

Below the Search bar is a filter selection which allows the user to display all of the DID's or only those that have not been assigned to an extension.

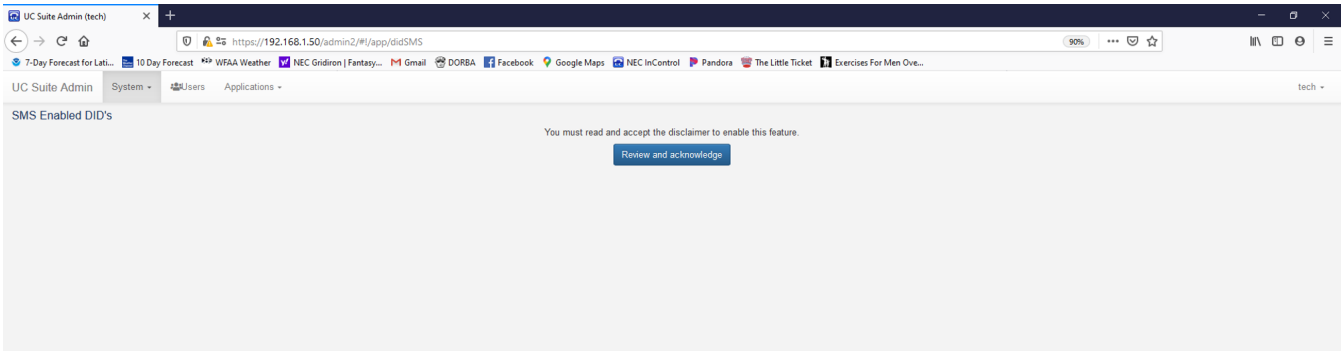
The user can edit the Extension field to change the assignment between the dial number and the extension.

The user can edit the Label field to change the text assigned to the selected inbound number.

1.5 SMS Enabled DID's

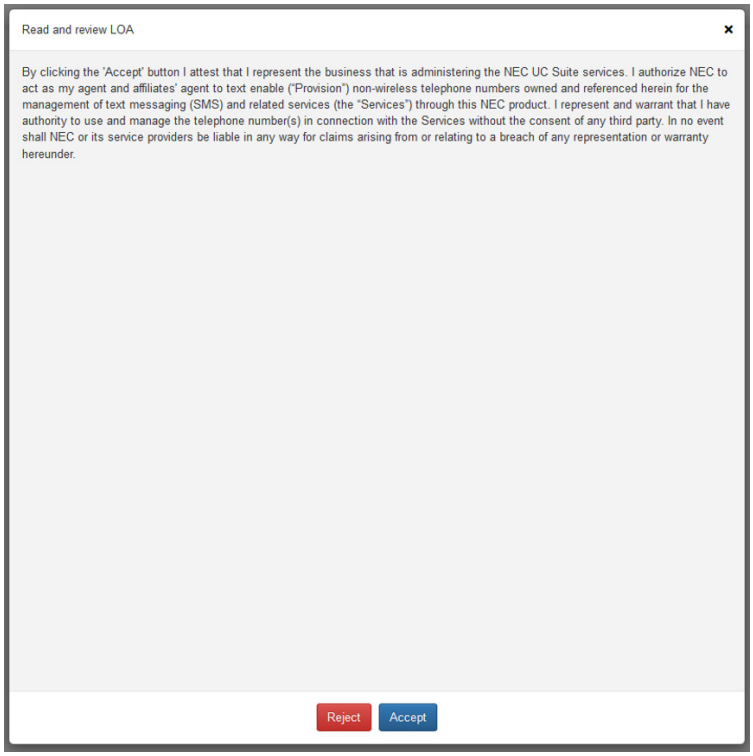
With UC Suite 7 or higher, selecting the SMS Enabled DID's option from the System menu allows the Admin user to text-enable their DID numbers. During initial setup, the user will be prompted to read and accept the disclaimer to enable the feature. Click on the **Review and acknowledge** button.

Figure 3-17 SMS Message



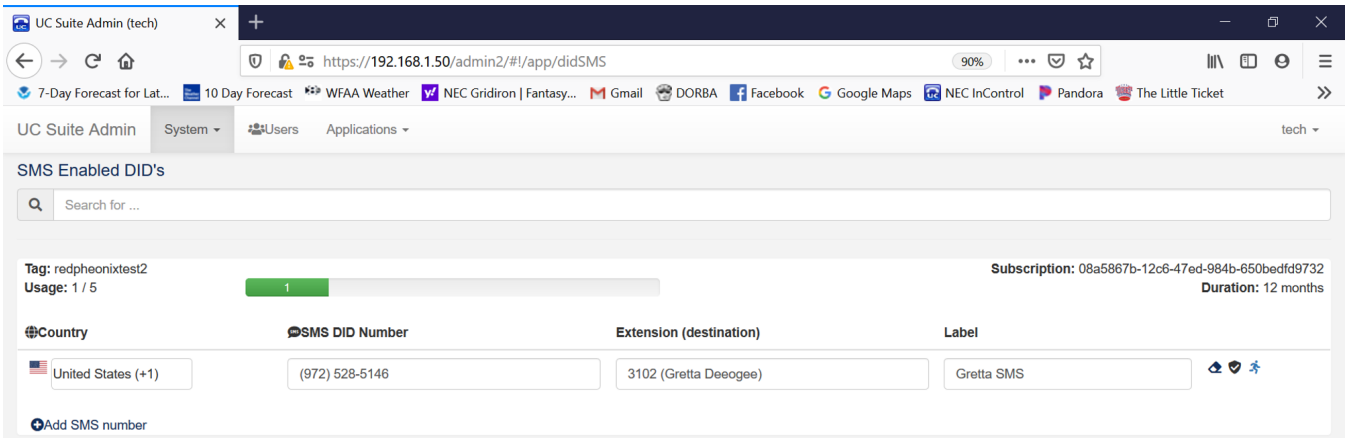
The LOA has the administrator verify they are authorized to use the DID numbers for the purpose of sending SMS messages. The following shows a sample of the LOA.

Figure 3-18 Read and Review LOA



The following image shows an example of the menu that is displayed when this feature is selected.

Figure 3-19 Example of SMS Integration



Each block of licenses retrieved from LMS for the local site includes a Tag label that is shown at the top of the section. This Tag is assigned through the dealer portal and cannot be modified within Admin.

The summary for each license block includes the following information:

- Tag value
- License usage
- Subscription number
- Duration of license

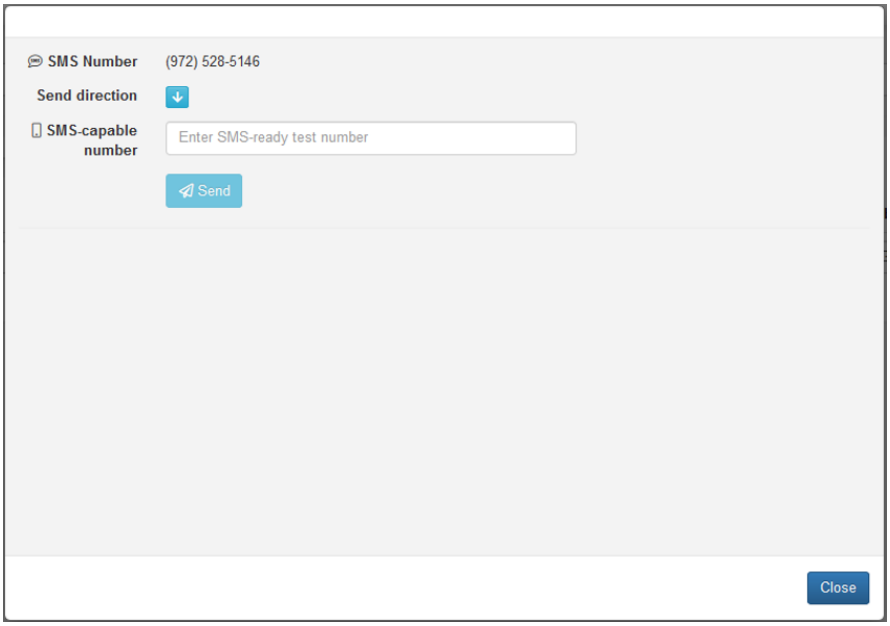
To add a new number within a subscription block, the user will click on the icon labeled **Add SMS number**. This action will add a new row to the table within this subscription block.

For each license in the subscription block, the user can assign a DID number to the license by entering the phone number in the SMS DID Number field. This number is assigned to a UC user by entering the UC Username or extension into the Extension field. The Label field allows the user to assign a name to this DID number, which is displayed within the UC Web Client.

Existing assignments can be removed by clicking the clear icon at the end of the associated row. This will clear the DID number and allow the license to be used for a different assignment.

For each assigned number, there is also a test icon at the end of the row. This allows the user to send a test message from the assigned DID number to verify the operation of this feature. When the Test number function is selected, the following menu is displayed.

Figure 3-20 Example of SMS Test Message

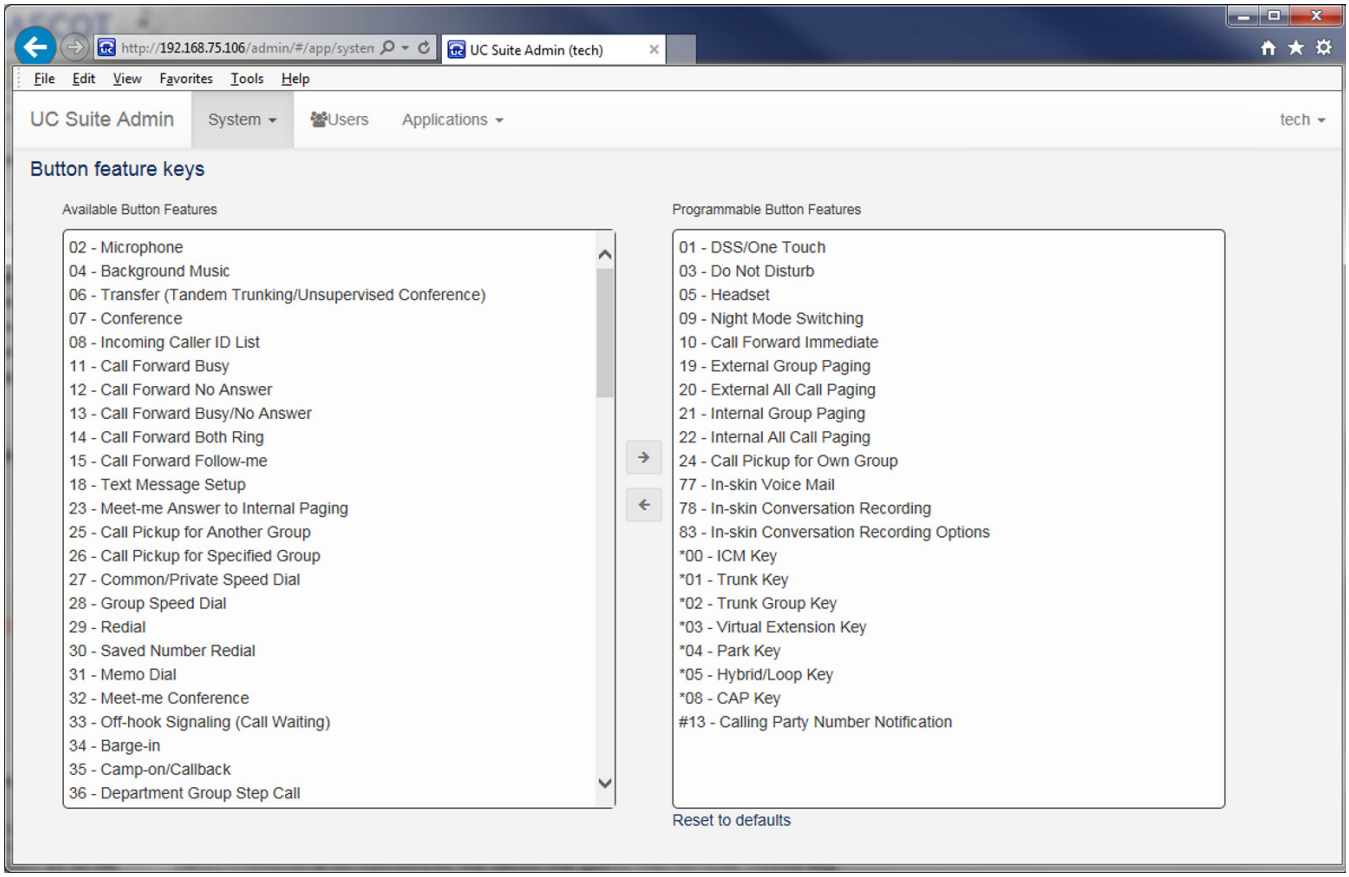


This test menu allows the user to initiate a test message from either the DID number or to the DID number. To send a message, the user must enter a valid mobile number into the **SMS-capable number** field and click on the **Send** button.

1.6 Button Feature Keys

Selecting the Button Feature Keys option from the System menu allows the user to define the set of features that can be assigned to buttons using this Admin utility. The following image shows an example of the menu that is displayed when this feature is selected.

Figure 3-21 Button Feature Keys Screen



The right column lists features that can be assigned to feature keys when using the Admin utility. The left column displays remaining possible features available in the SV9100 system, but not included in the list that can be assigned in **System > Extensions > Buttons**.

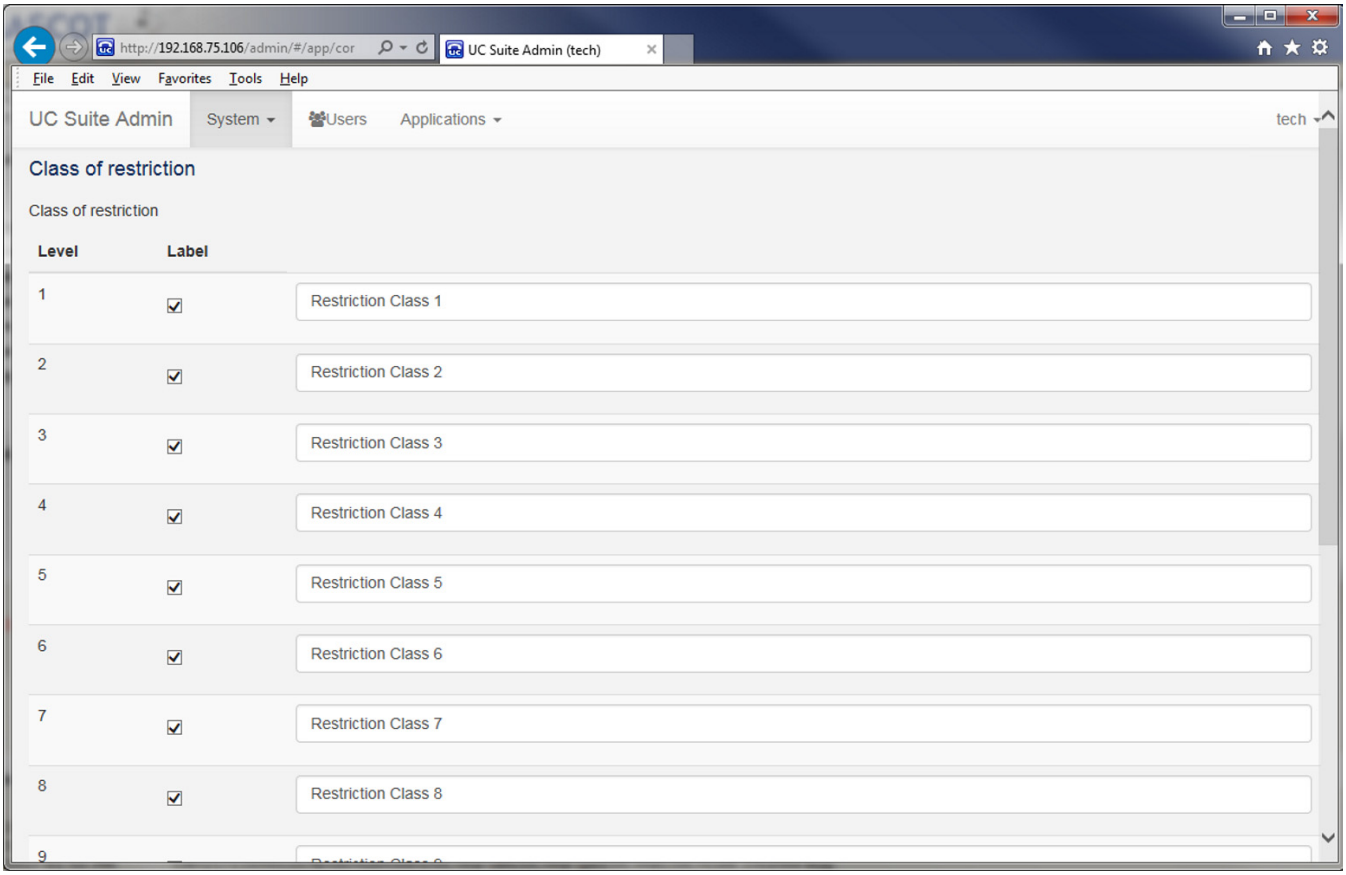
Features can be moved from one list to the other by selecting an item in the list, then clicking on the appropriate arrow displayed between the two lists. Multiple entries can be moved in a single action by making multiple selections before pressing the arrow button. A range of buttons can be selected by clicking the first button in the range, holding the Shift key, then selecting the last button in the range.

This menu also provides a Reset to Defaults feature under the Programmable Button Features list which restores the lists to their factory default settings. In the above image, the features in the right column show the default feature list.

1.7 Class of Restriction

Selecting Class of Restriction under the System menu allows the admin the ability to assign names to the Toll Restriction Classes in the system. The names are only used in the Admin Utility and not written to any Program in the system. By assigning names, the user can better identify the purpose and intended use for each profile. The following image shows an example of this menu.

Figure 3-22 Class of Restriction – Assign Names Screen

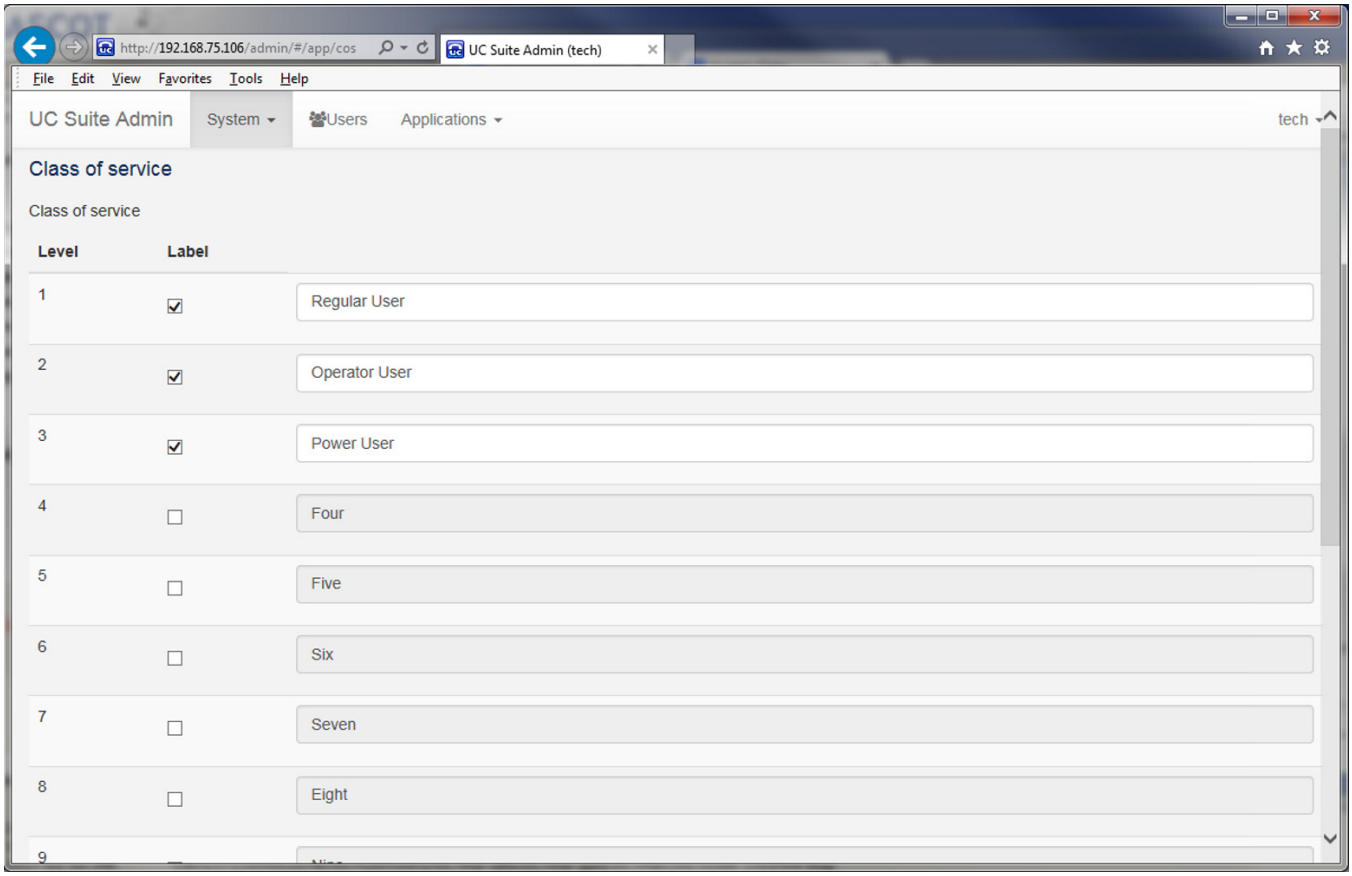


The table lists all 15 Toll Restriction Classes. The Label field for each slot allows the user to assign a name to that profile. The user can also enable/disable each class by using the checkmark control at the end of the entry. Only entries that are enabled will be shown as options when a user is adding/modifying an extension definition.

1.8 Class of Service

Selecting Class of Service from the System menu allows the admin the ability to assign names to Class of Service slots within system programming. By assigning names, the user can better identify the purpose and intended use for each profile. The following image shows an example of this menu.

Figure 3-23 Class of Service – Assign Names Screen

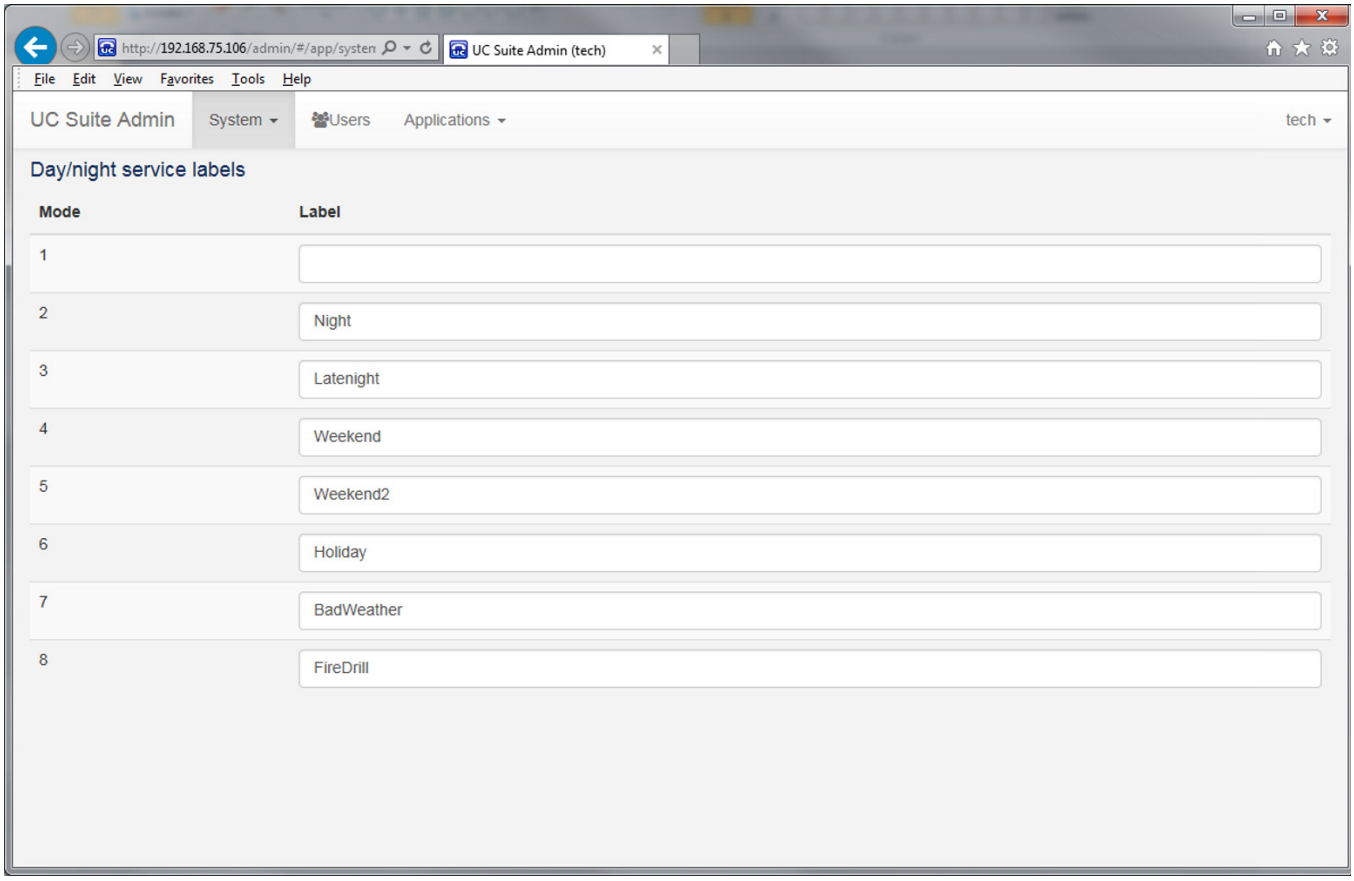


The table lists all 15 slots for the Class of Service profiles. The Label field for each slot allows the user to assign a name to that profile. The user can also enable/disable each Class of Service by using the checkmark control at the end of the entry. Only entries that are enabled will be shown as options when a user is adding/modifying an extension definition.

1.9 Day/Night Service Labels

The Day/Night Service Labels option allows the user to modify labels associated with each Day/Night mode. The following image shows an example of this menu.

Figure 3-24 Day/Night Service Labels Screen



The menu displays the current label text defined for each of the 8 Day/Night modes. Clicking on one of the Label fields allows the user to edit the contents of the text field. This is associated with Program 12-07.

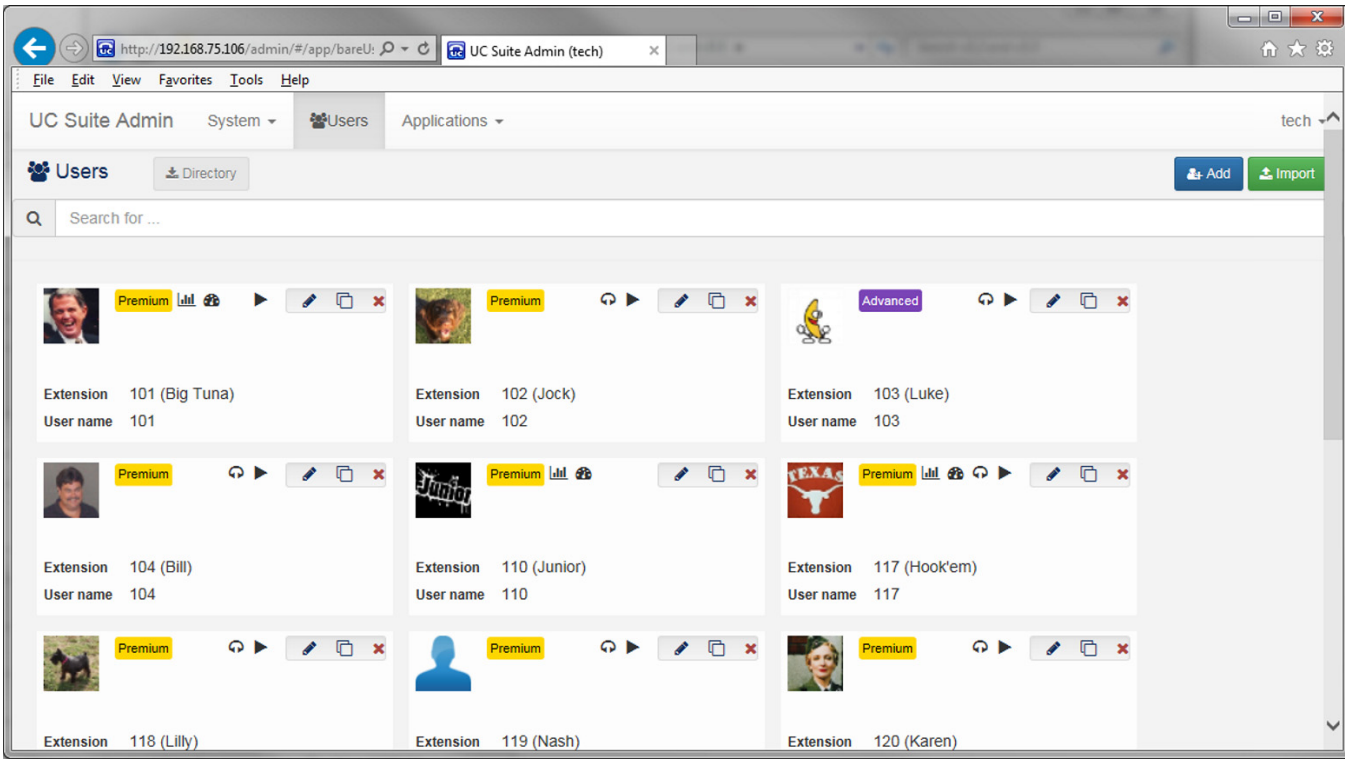
Users

Chapter 4

SECTION 1 OVERVIEW

The Users option allows the administrator to update the profile for a UC User. This function is similar to the UC User operation provided in UC Suite Admin, v.5.1. However, the editing functionality has been updated to provide easier access to the user settings. The following image shows an example of this menu.

Figure 4-1 Users Screen

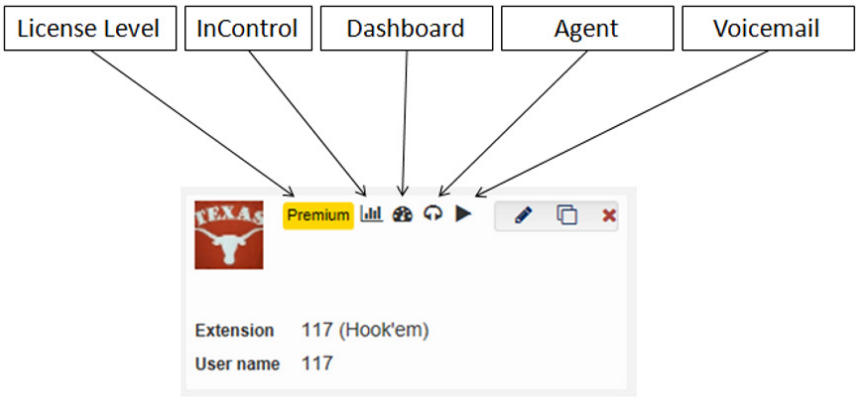


Each entry in the user list displays the following fields:

- ❑ Photo
- ❑ First/Last Name
- ❑ Extension Name
- ❑ Extension
- ❑ User Name

In addition, each entry includes icons that indicate some of the privileges assigned to that user. This can include the license level, InControl, Dashboard, Agent and Voicemail. The following image shows an example of a user with a Premium license that can also access InControl, Dashboard, UC Agent features and Voicemail.

Figure 4-2 Example of Privileges Icons

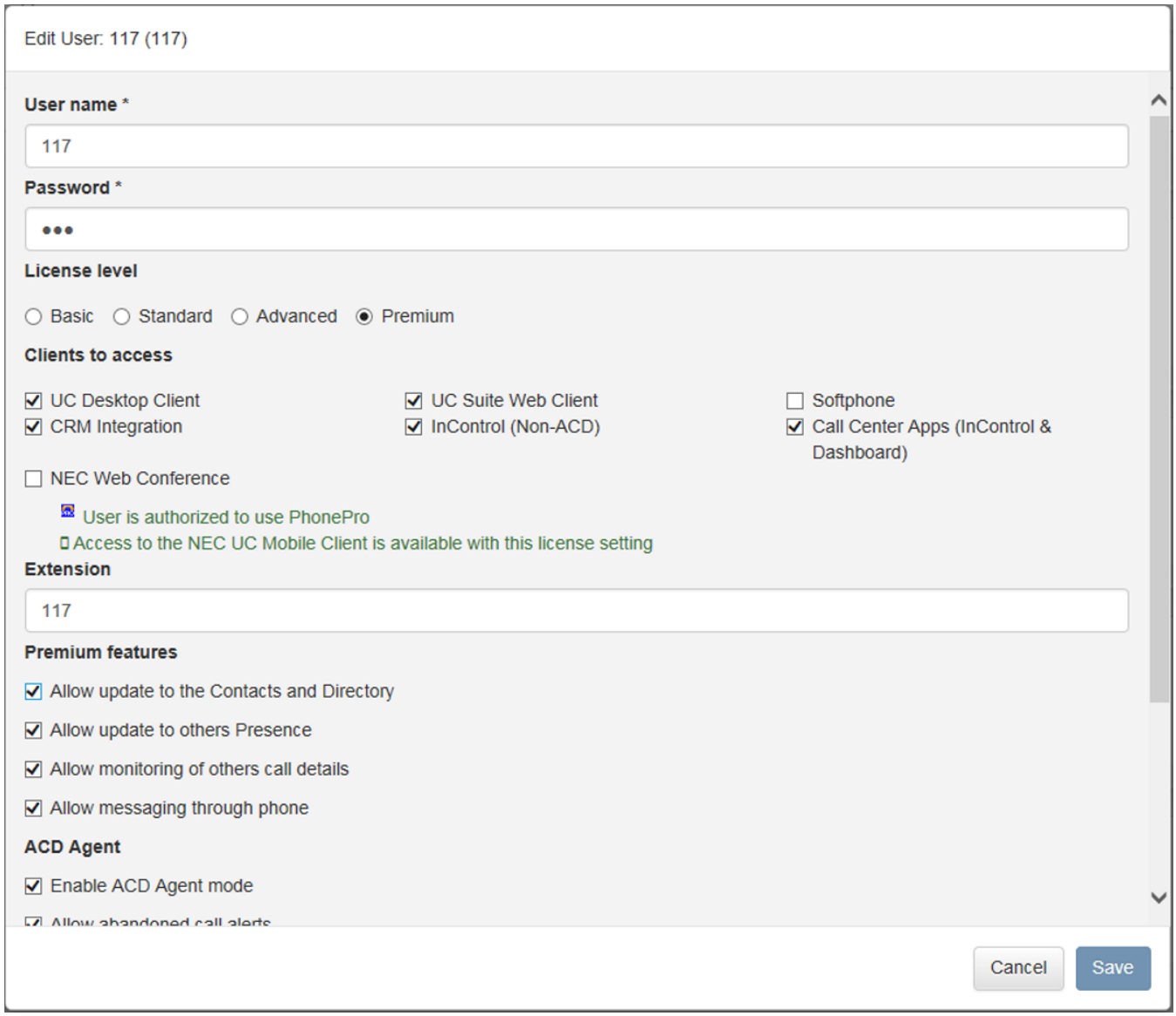


The icons on the left side of an entry provide easy access to additional functions that can be applied to the selected user.

The Edit (pencil) button is a drop down that provides access to User Permissions, Contact Information and Phone Settings.

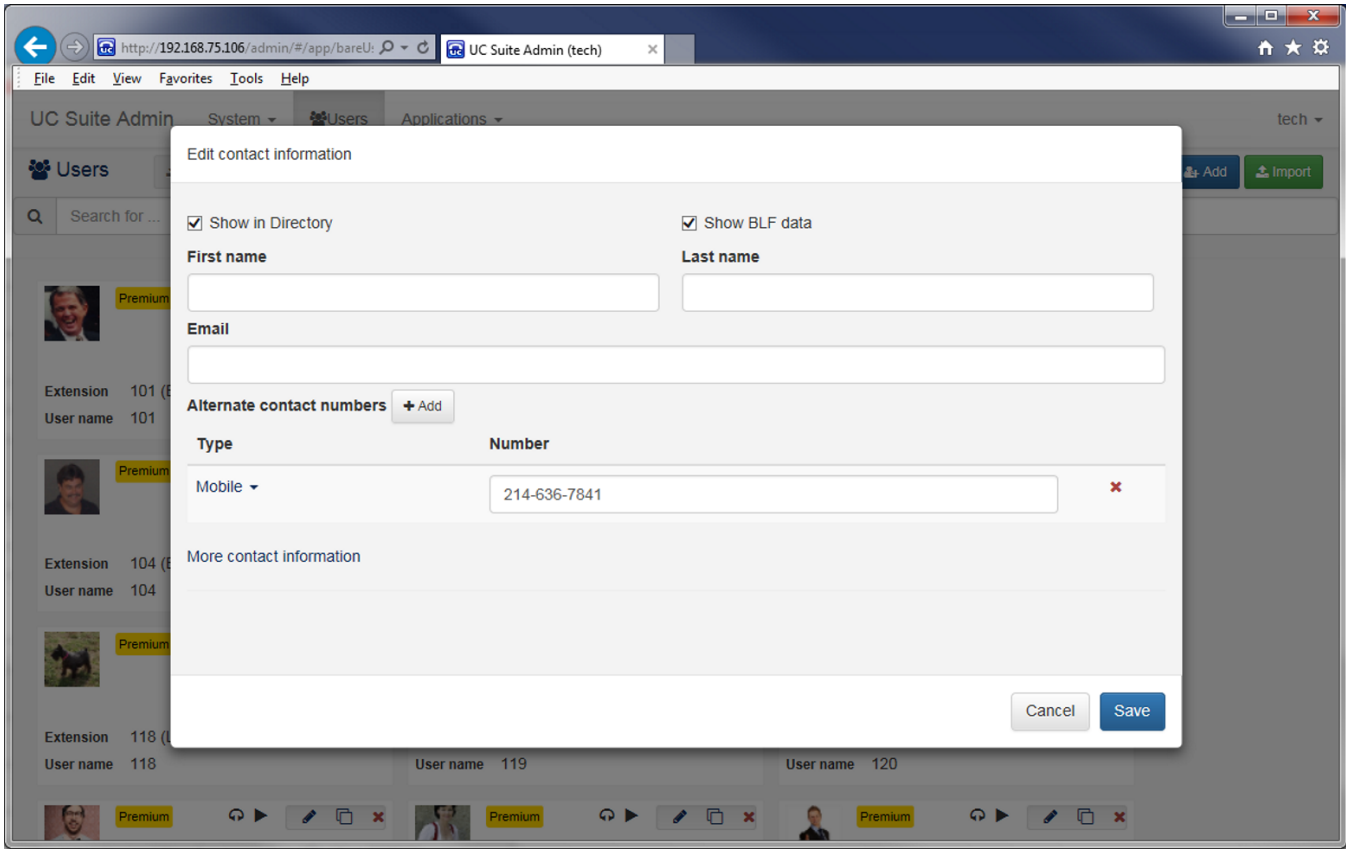
Selecting User Permissions opens the Edit User window to edit the user login information, license level, client access and feature availability for the specified user.

Figure 4-3 Edit User Screen



Selecting Contact Information opens the Edit Contact Information window for the selected user. This information will be visible within the Directory features of the UC Suite. The following image shows an example of the Contact Information area.

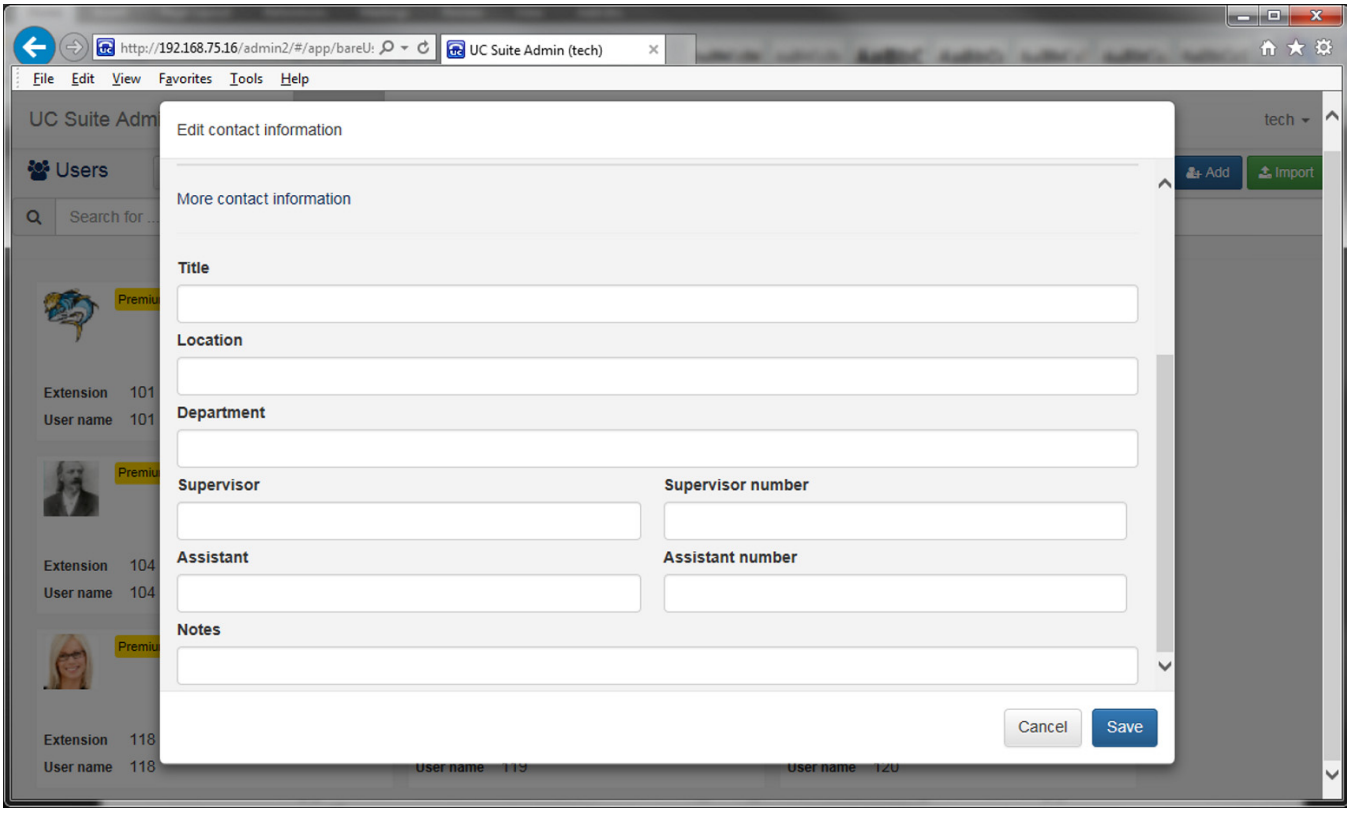
Figure 4-4 Edit Contact Screen



The information provided in this form can be shared with other employees using the Directory features within the UC Suite clients. The Alternate Contact Numbers area allows the user to add additional phone numbers to be associated with this user.

Selecting the More Contact information link expands the Contact Information section to display additional details for this contact, as shown in the following example.

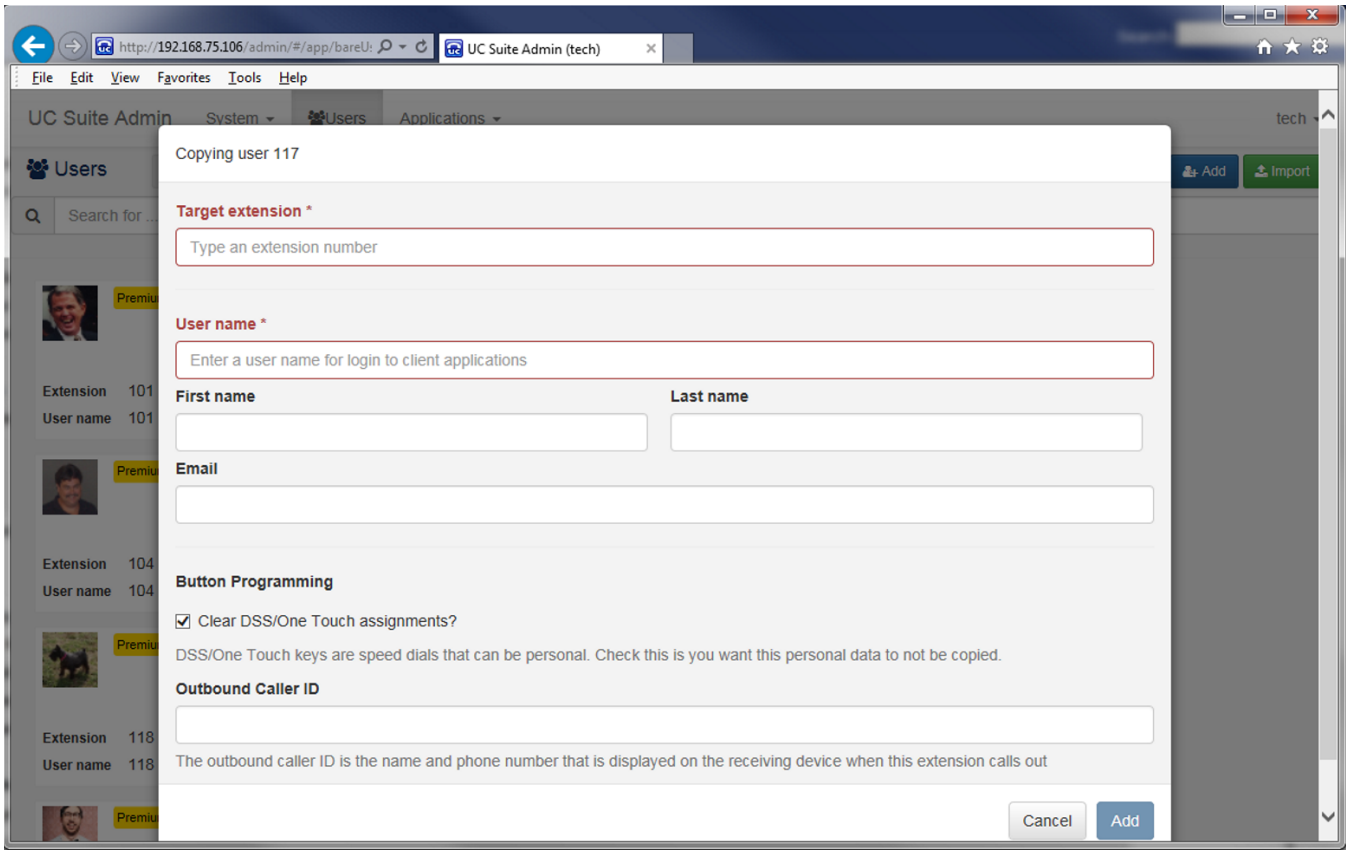
Figure 4-5 More Contact Screen



Selecting Phone Settings provides a shortcut to the Extension menu for the selected user. This menu is described in section 1.1 Extensions on page 3-1.

The Copy icon allows the administrator to create a copy of a selected user and assign the copy to a new name/extension. The following image shows an example of the Copy operation.

Figure 4-6 Copy User Screen



The Copy operation duplicates the User Permissions and Telephone Settings for the new user. The user name and contact information can be updated to be specific for the new user.

The Delete icon can be used to remove a user definition. When the Delete option is selected, the application will prompt the user to verify that the targeted user should be deleted.

The User screen also provides a Search bar which allows the administrator to easily locate an entry by entering either the extension number or user name.

Applications

Chapter 5

SECTION 1 DESCRIPTION

The Applications settings category allows the user to modify settings that apply to the UC Presence settings and the Contact Center applications. Each of these areas is further defined in the following sections.

1.1 Web Client Profiles

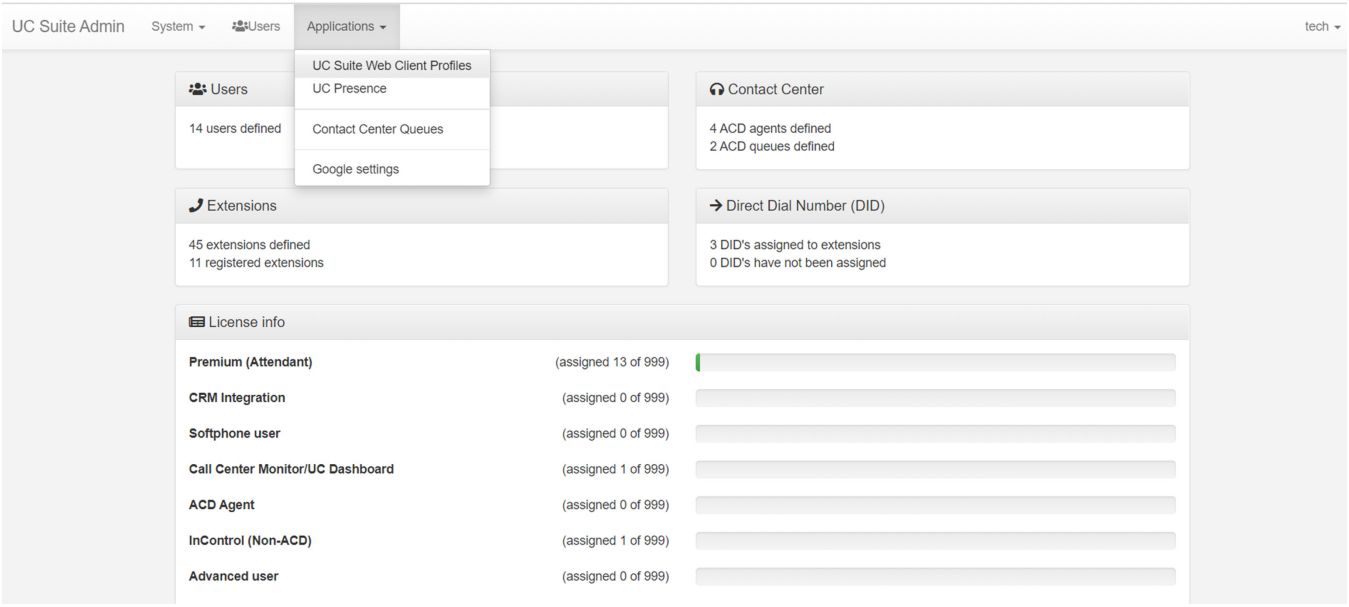
With UC Suite 6.5 or higher, Web Client Profiles allow administrators to pre-configure settings for new web client users. This enhancement allows an administrator to define profile settings that can be applied to web client user accounts. This allows an admin to create several different profiles to match the needs of different classes of users and assign a new user with the appropriate profile.

The first time the user logs into the UC Web Client, their settings will be configured as specified in the profile. Additionally, the administrator can disable individual users from changing their web client settings to ensure that their configuration is stable.

1.1.1 Defining Profiles

Select **UC Suite Web Client Profiles** from the Applications menu in UC Admin.

Figure 5-1 UC Suite Web Client Profiles Screen



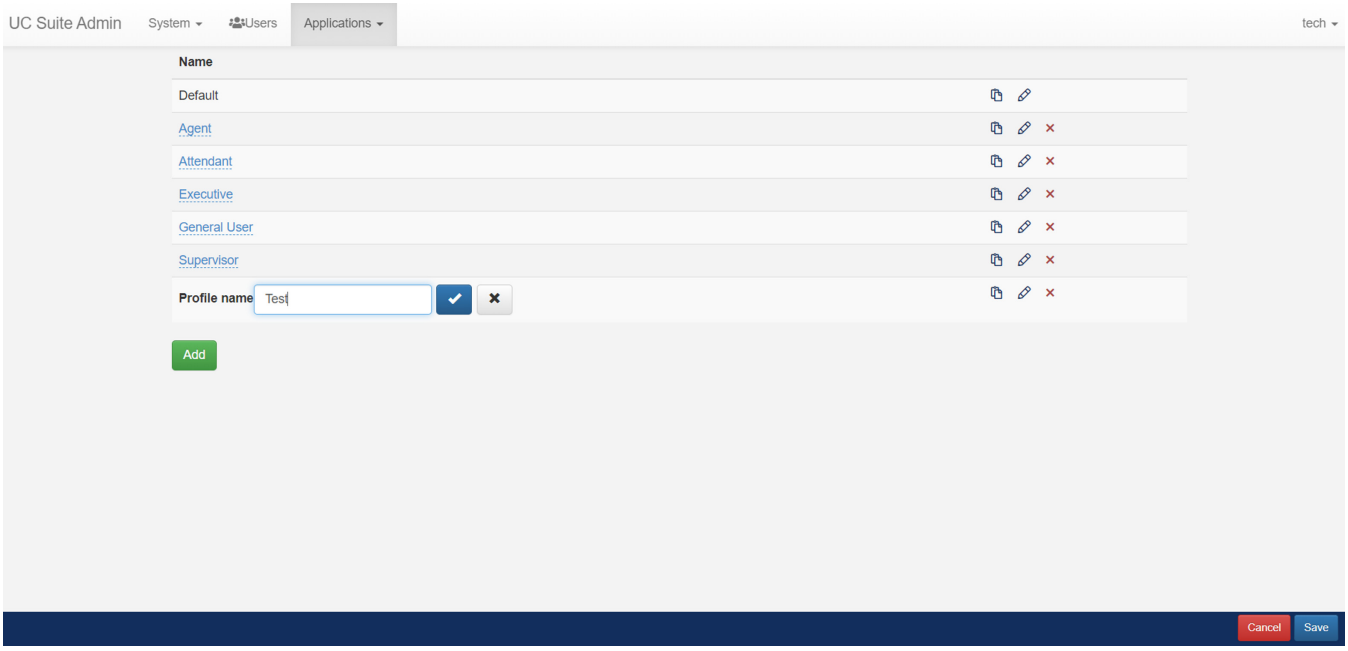
This menu lists all of the profiles that are currently defined. The icons on the right of each entry can be used to **Copy**, **Edit** or **Delete** the selected profile.

Figure 5-2 UC Suite Web Client Profiles – Applications Screen

The **Add** button is used to create a new profile. Selecting the Add button will add a new row to the Profile list with the name of **empty**.

Clicking on a **Profile name** will allow the user to change the name of the Profile. The following image shows an example of editing a profile name.

Figure 5-3 UC Suite Web Client Profiles – Profile name



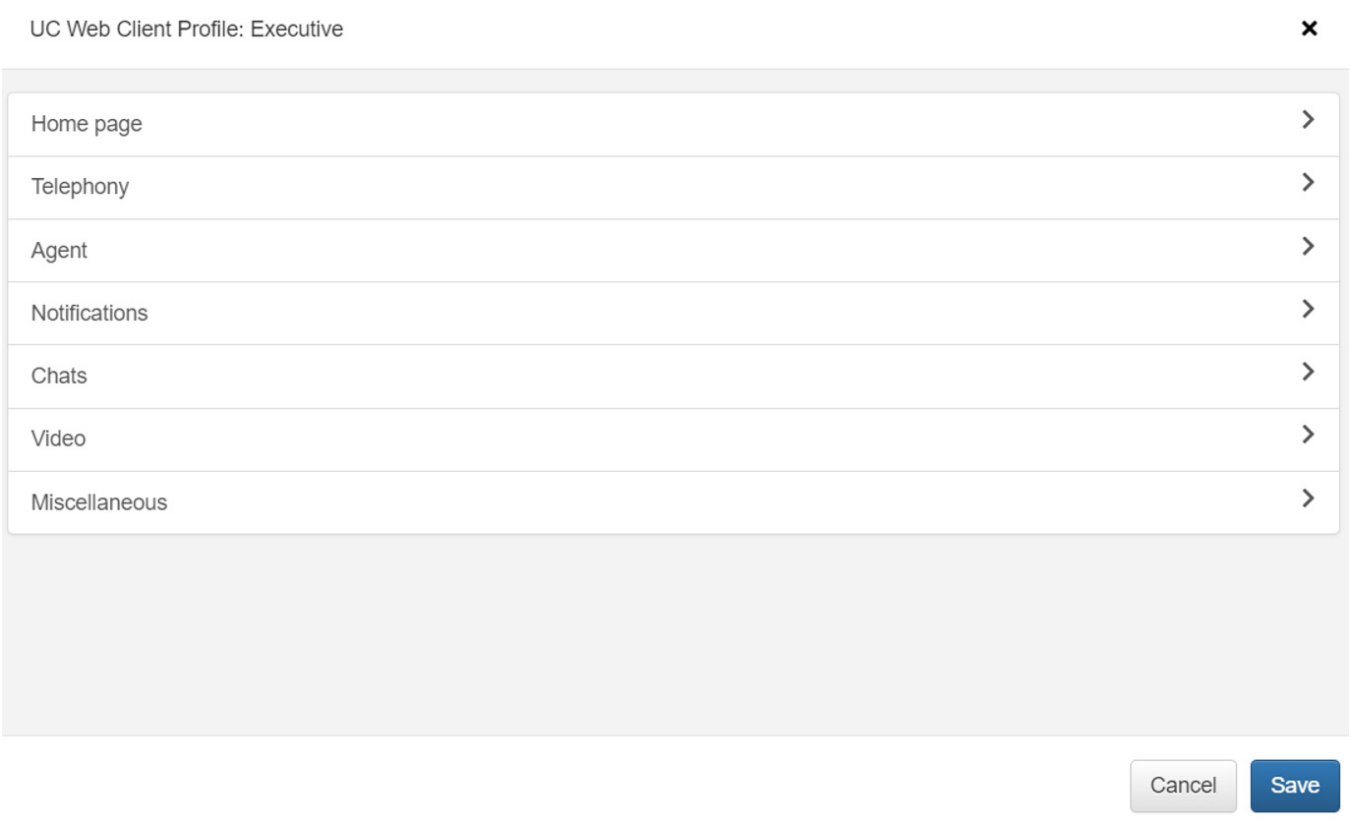
After a new string is entered, clicking on the **check mark** icon will apply the change. Clicking on the **X** icon will close the control without applying any changes.

Selecting the **Copy** icon will insert a new row in the profile table that is a copy of the selected profile. The name for the new profile will be the name of the original profile, followed by **Copy**.

Selecting the **Delete** icon will pop up a confirmation dialog to verify that the selected Profile is to be deleted. After confirming the operation, the selected profile will be removed from the list.

Selecting the **Edit** icon will open the full Settings menu allowing the user to adjust individual configuration items. The following image shows the Settings menu that is opened when the Edit icon is selected.

Figure 5-4 UC Suite Web Client Profiles – Executive Screen



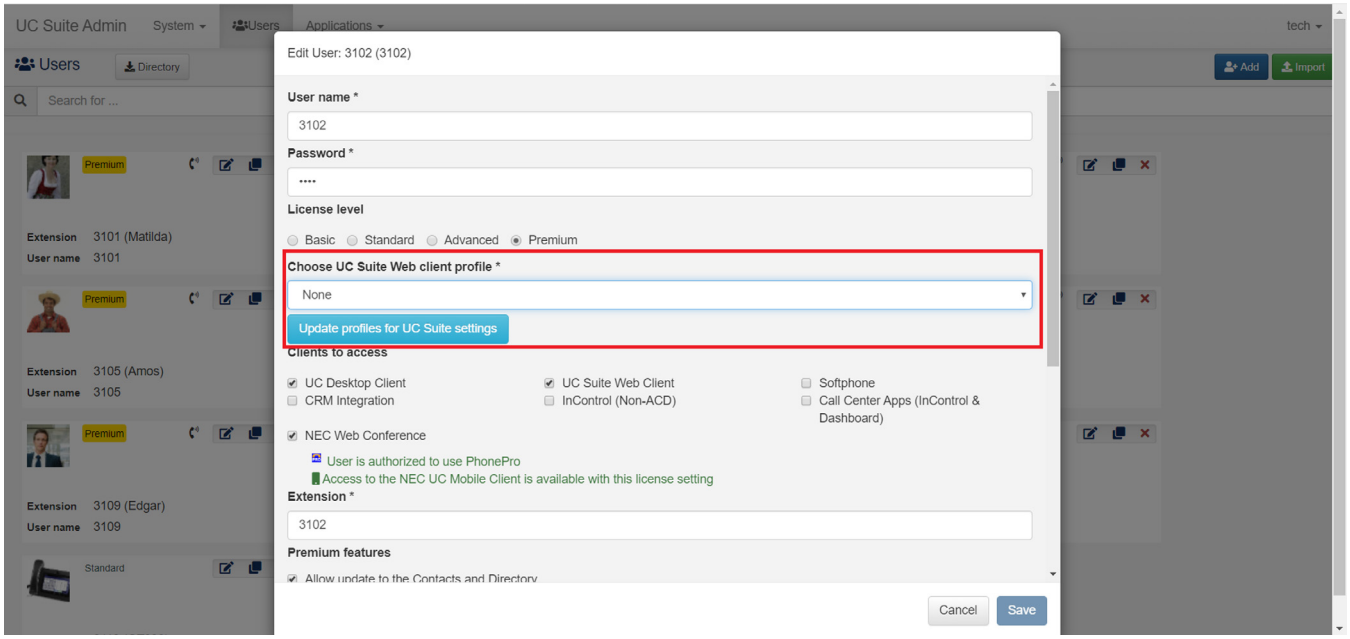
This menu is a replica of the Settings menu that is provided within the web client. Each category will open a submenu that displays the individual configuration items associated with that part of the application.

After adjusting the options within each category, pressing the **Save** menu will update the profile definition. Pressing the **Cancel** button will close the Settings menu without applying the updates.

1.1.2 Assigning Profiles

When viewing the Users area within Admin, the administrator can assign a profile to a user by selecting the User Permissions option within the **Edit** menu. A new field will be added to the User Permissions menu as shown below.

Figure 5-5 UC Suite Web Client Profiles – Edit User



The drop down menu for this control will display all of the profiles that are currently defined. Selecting one of the options will associate the profile with this individual user.

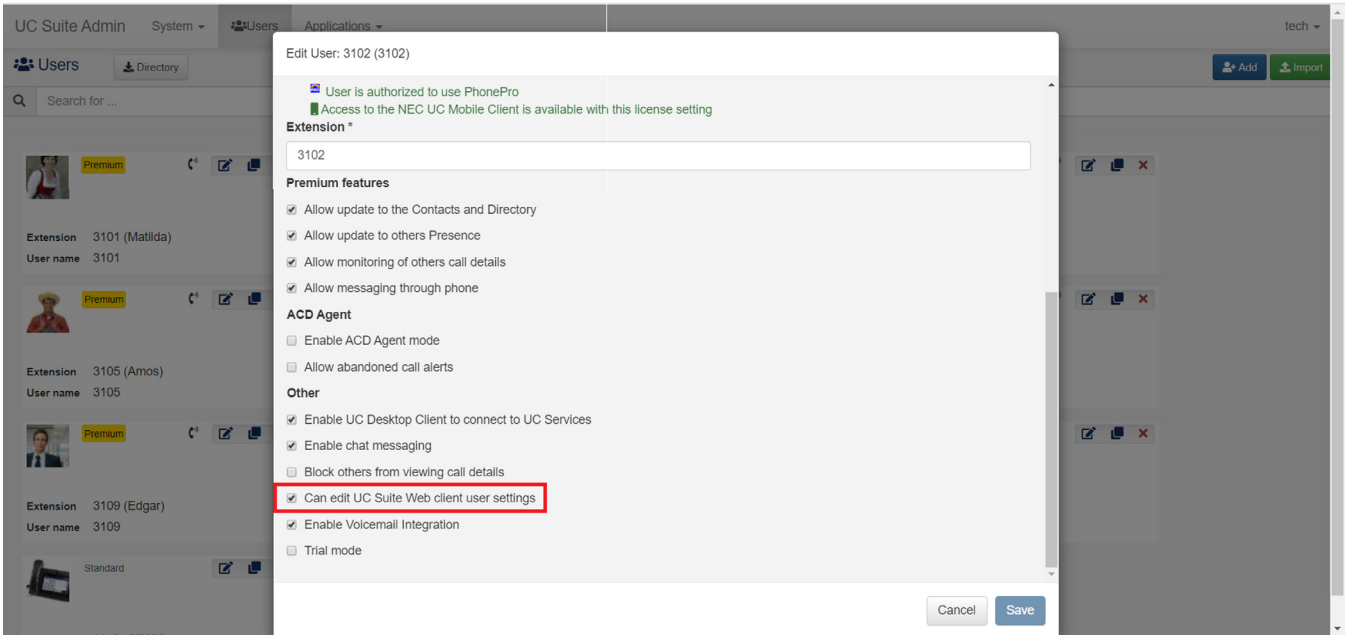
The drop down menu also contains the option **None**. Selecting None will remove any profile that was previously assigned to this user.

This control also provides a shortcut to access the Profiles area within Admin. Clicking on the **Update profiles for UC Suite settings** button will redirect the user to the Profile definition area.

1.1.3 Locking User Settings

The User permissions area within Admin will be updated to include a new option that determines if a user can modify the settings within Web client. The Other section of user settings will be updated to include the following option:

Figure 5-6 UC Suite Web Client Profiles – Edit Client User Settings



This option is enabled by default.

1.1.4 UC Web Client Settings Assignment

Default settings for new users that login to UC Web client are assigned from one of two sources:

- Default settings that have been defined for each value
- Settings Profile as defined in Admin

Each time a user logs into the web client, the application checks on the UC Server to see if a settings file exists for this user. The presence of an existing settings file will indicate that this is not the first time that this user has logged into the web client. The existing settings file includes the values that were in use for the most recent user session. If this file is found, the settings values from that file are used.

If a user logs in and a settings file is not found on the UC Server, this indicates that the user has not logged in before. In this case, the application will check the user account to determine if Admin has an assigned Settings Profile. If a Profile has been assigned, then the current values for this file will be assigned as settings for this user. If a Profile is not assigned, then the user will be assigned the default settings value.

In the case where a user logs in for the first time and the name of the Profile assigned is not found in the active Profiles list, an error message will be shown and the default settings applied.

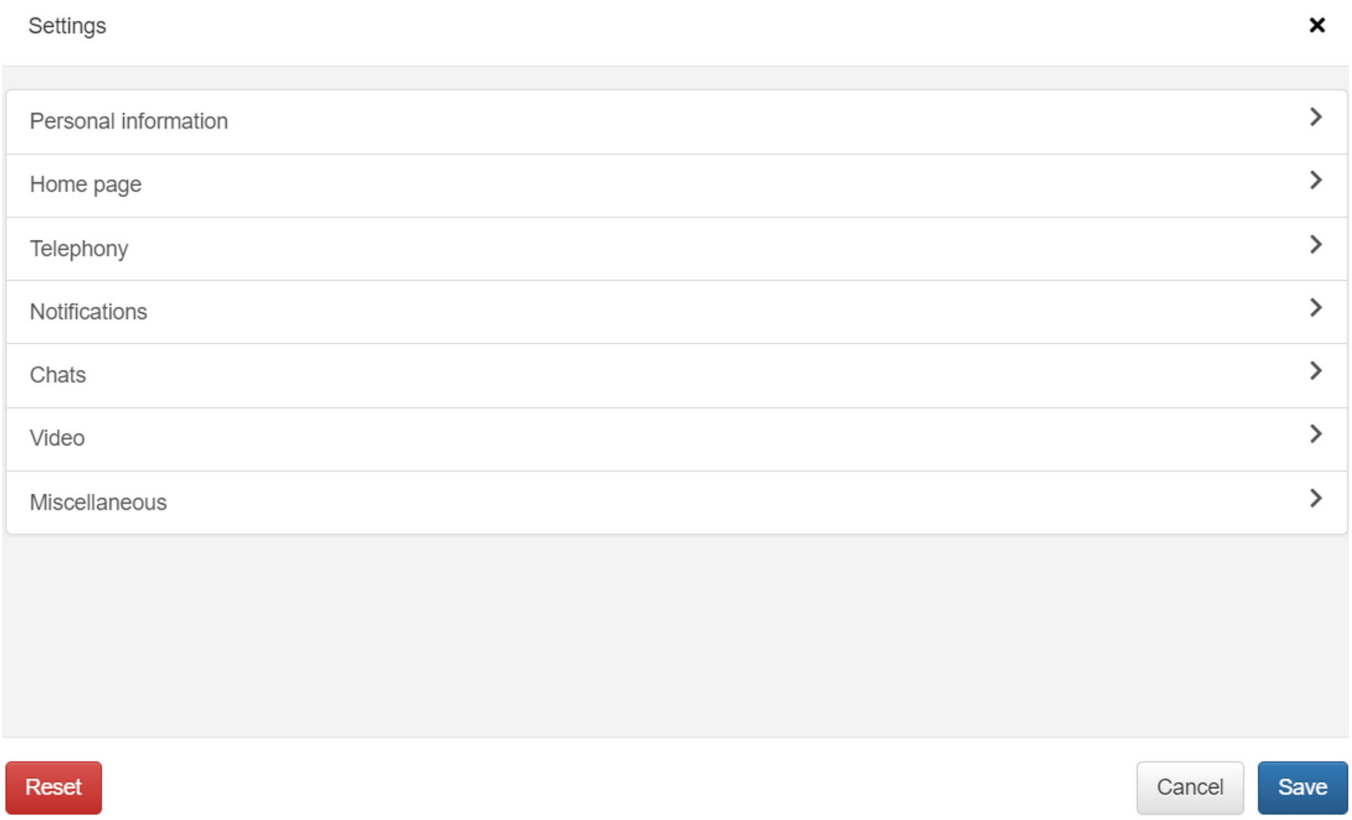
If the user is permitted to modify their settings, the updated values will be saved for that individual user.

Changes made to the Profile settings in Admin are not applied to users that have already logged in for the first time. Similarly, if a Profile is deleted from the active list, users that have that Profile assigned will continue to use the most recent settings they have selected.

1.1.5 Reset of Web Client Settings

The Settings menu within UC Web Client includes a new Reset button, as shown in the following image.

Figure 5-7 UC Suite Web Client Profiles – Reset Client Settings



Pressing the **Reset** button, will restore the Settings to the default values, as follows:

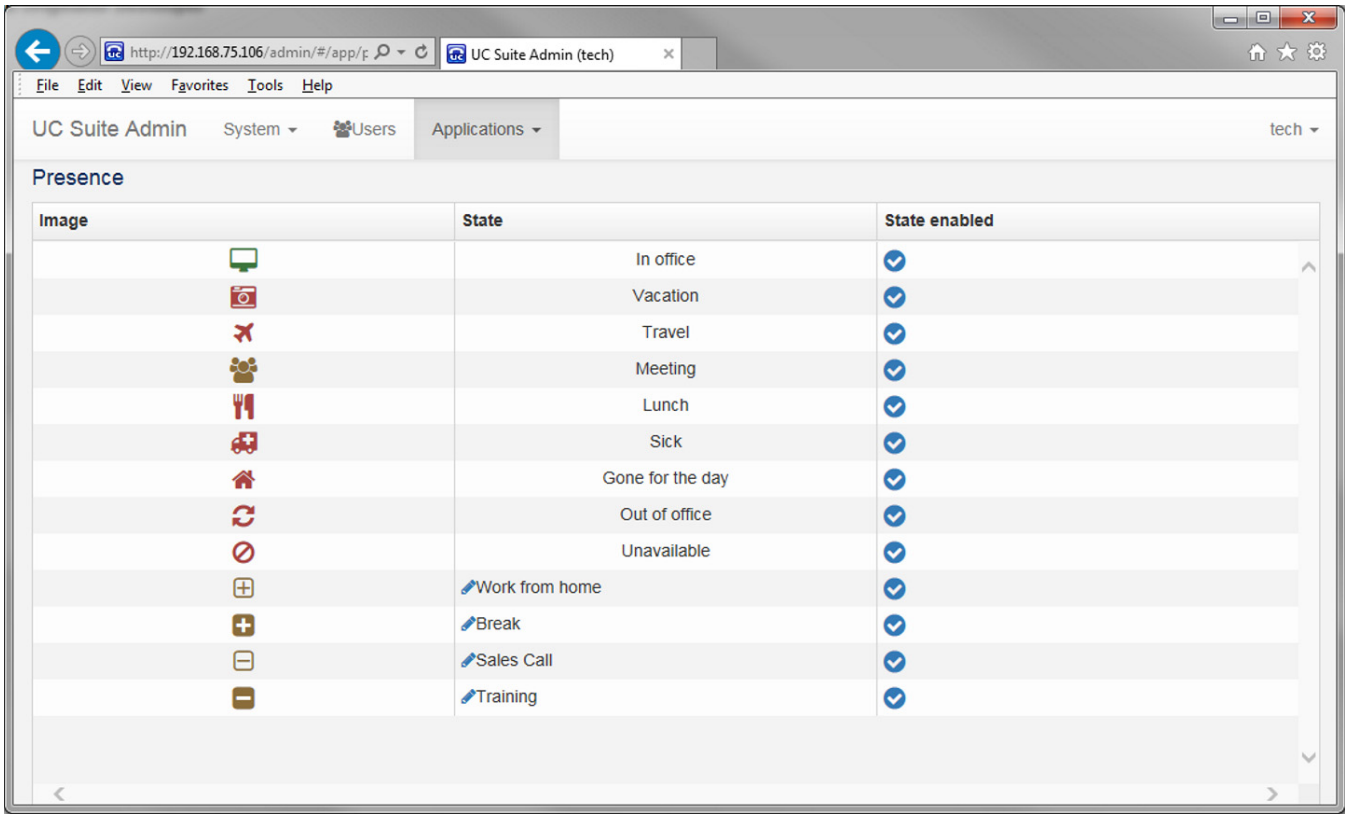
- If the user has a settings Profile assigned to their account within Admin, the values currently defined in the Profile will be used.
- If the user does not have a settings Profile assigned, the values will be restored to the application defaults.

If a user has been assigned a Profile that is no longer active in Admin, an error will be displayed.

1.2 UC Presence

The Presence feature allows the user to select which Presence states will be visible to UC users. The user can also modify the names associated with the Custom Presence states. The following image shows an example of the Presence menu.

Figure 5-8 UC Presence Screen



The operation of this feature is the same as in the previous UC Suite Admin, v.5.0 release.

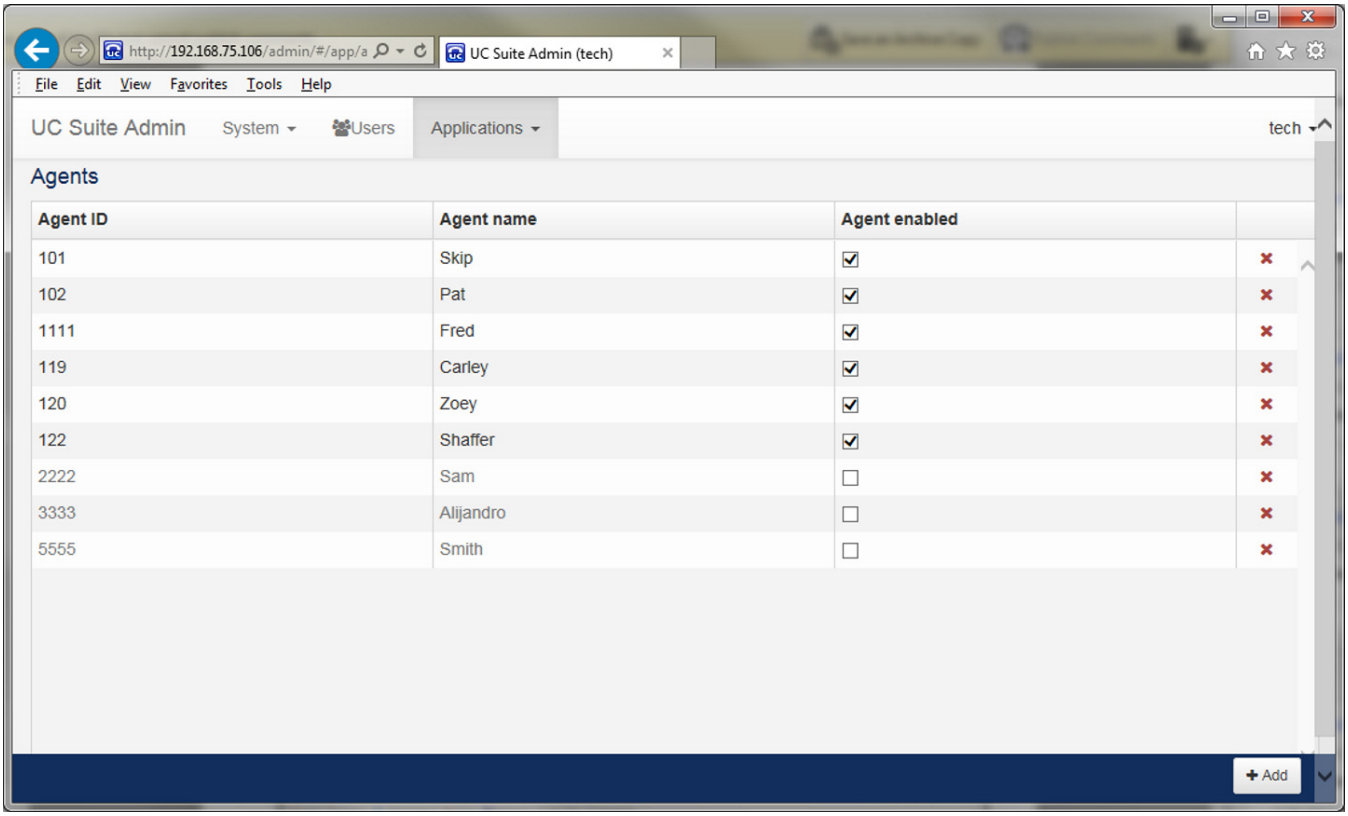
1.3 Contact Center

The Contact Center settings category allows the user to modify names associated with the Agents and Queues within the Contact Center. These Agent names and Queue names are used within the InControl reports and Dashboard views to easily identify Contact Center components. Each of these areas are further defined in the following sections.

1.3.1 Agents

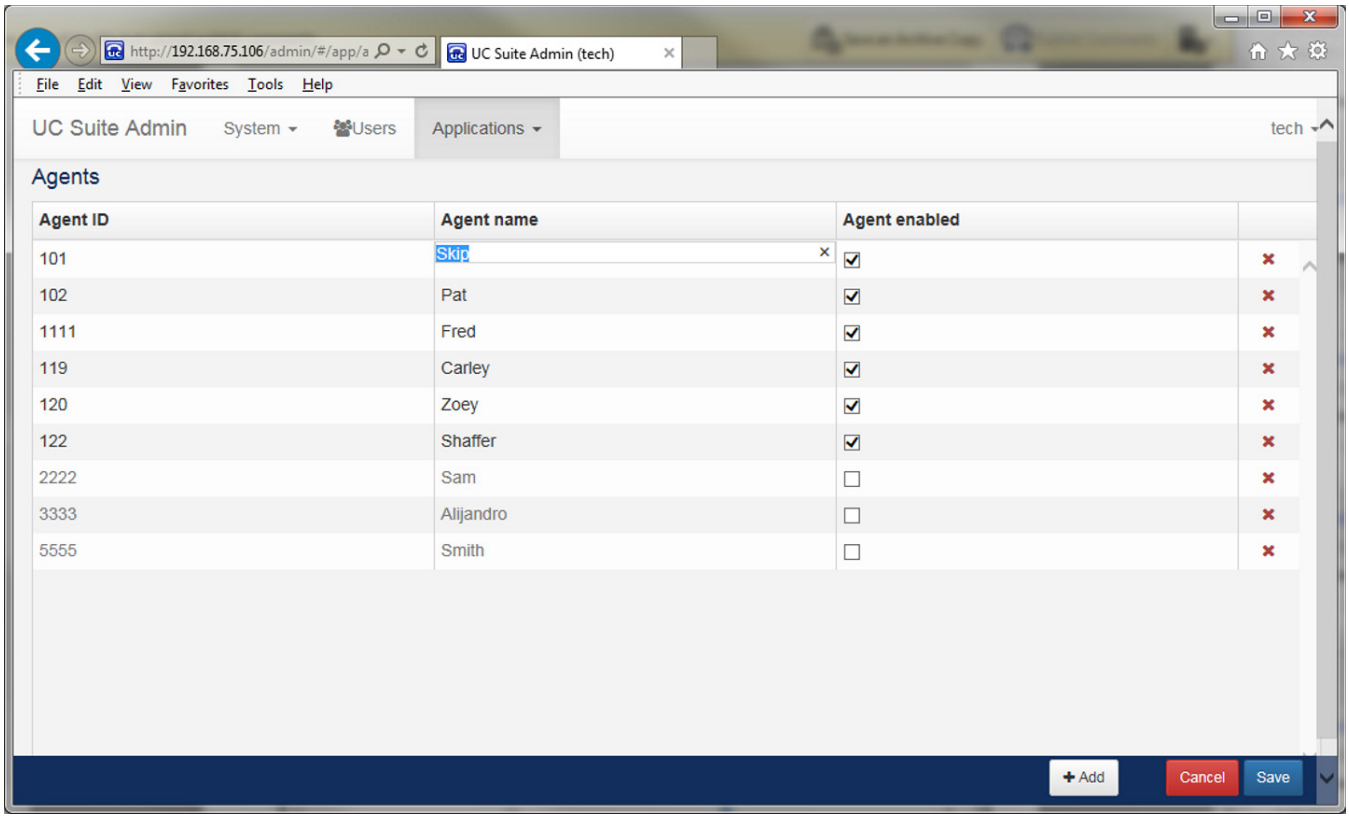
The Agents menu allows the user to modify the name associated with an agent and enable/disable an agent definition. Associated names will be used within InControl Reports and Dashboard displays to identify agents. The following image shows an example of the Agents menu.

Figure 5-9 Agents Screen



Clicking on an entry in the Agent Name column switches the selected entry to Edit mode. The user can then update the name associated with that User ID. The red “X” on the right end of the table can be used to remove an entry from the table. When changes are made, Save and Cancel buttons will be displayed. The Save button applies the changes, the Cancel button discards any changes to the Agent names.

Figure 5-10 Add Agents Screen

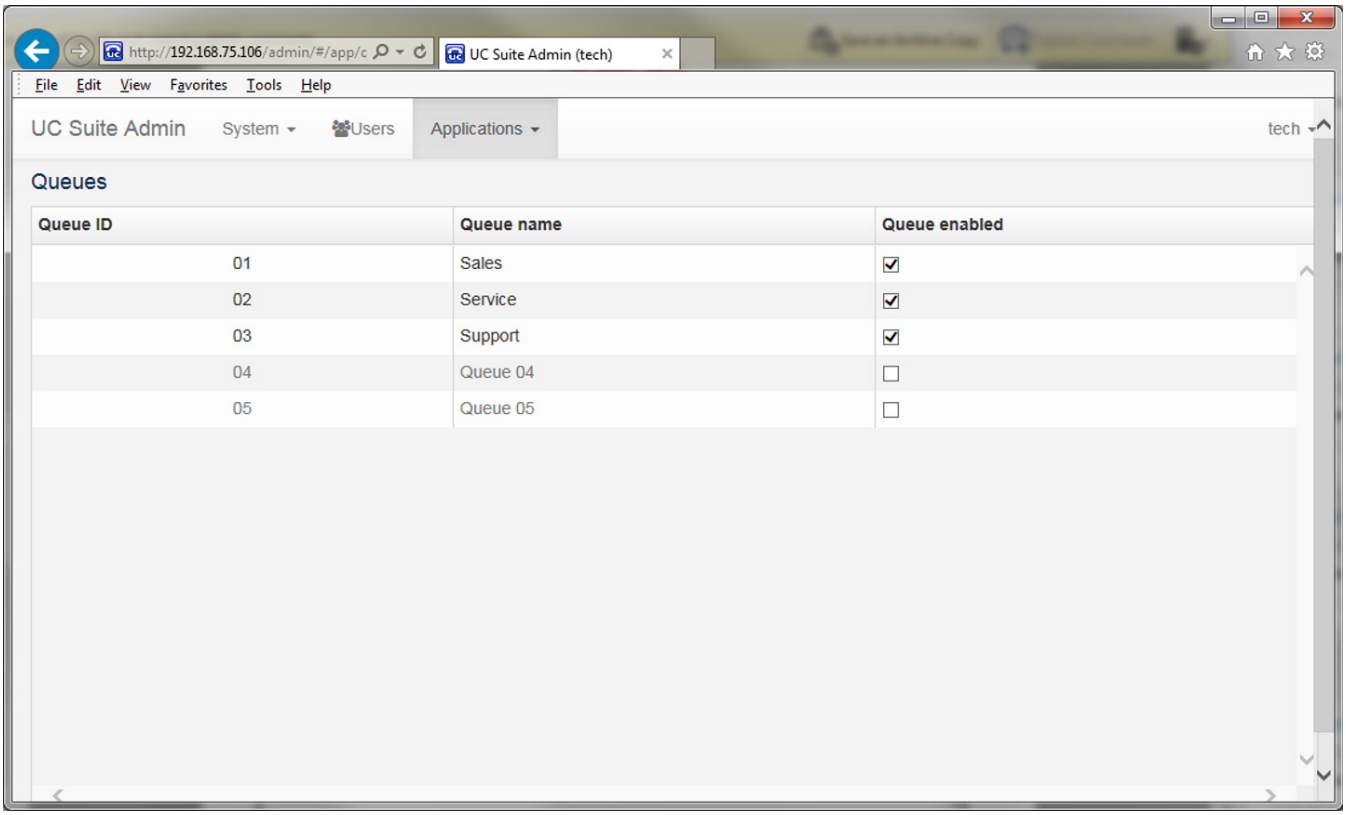


The ability to add a user to the list will only be presented if the Contact Center configuration supports the use of general Agent ID's as determined by Program 41-01-06. If this setting is enabled, only the Agent ID's set in Program 41-21 are displayed.

1.3.2 Queues

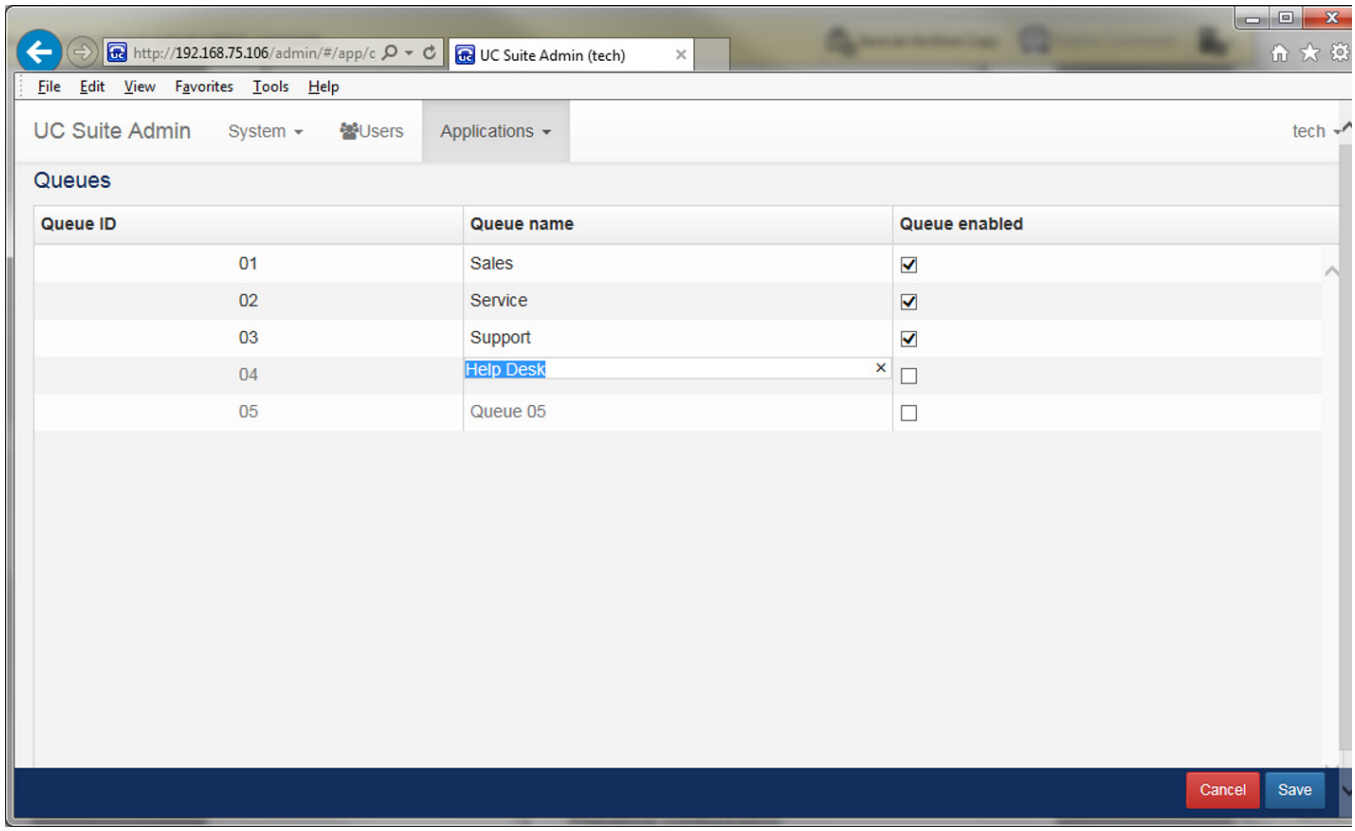
The Queues menu allows the user to modify the name associated with a queue and enable/disable the queue definition. The queue names are used within the InControl Contact Center reports and within the Dashboard displays. The following image shows an example of the Queues menu.

Figure 5-11 Queues Screen



Clicking on an entry in the Queue Name column switches the selected entry to Edit mode. The user can then update the name associated with that queue. When changes are made, Save and Cancel buttons will be displayed. The Save button applies the changes, the Cancel button discards any changes to the Queue names.

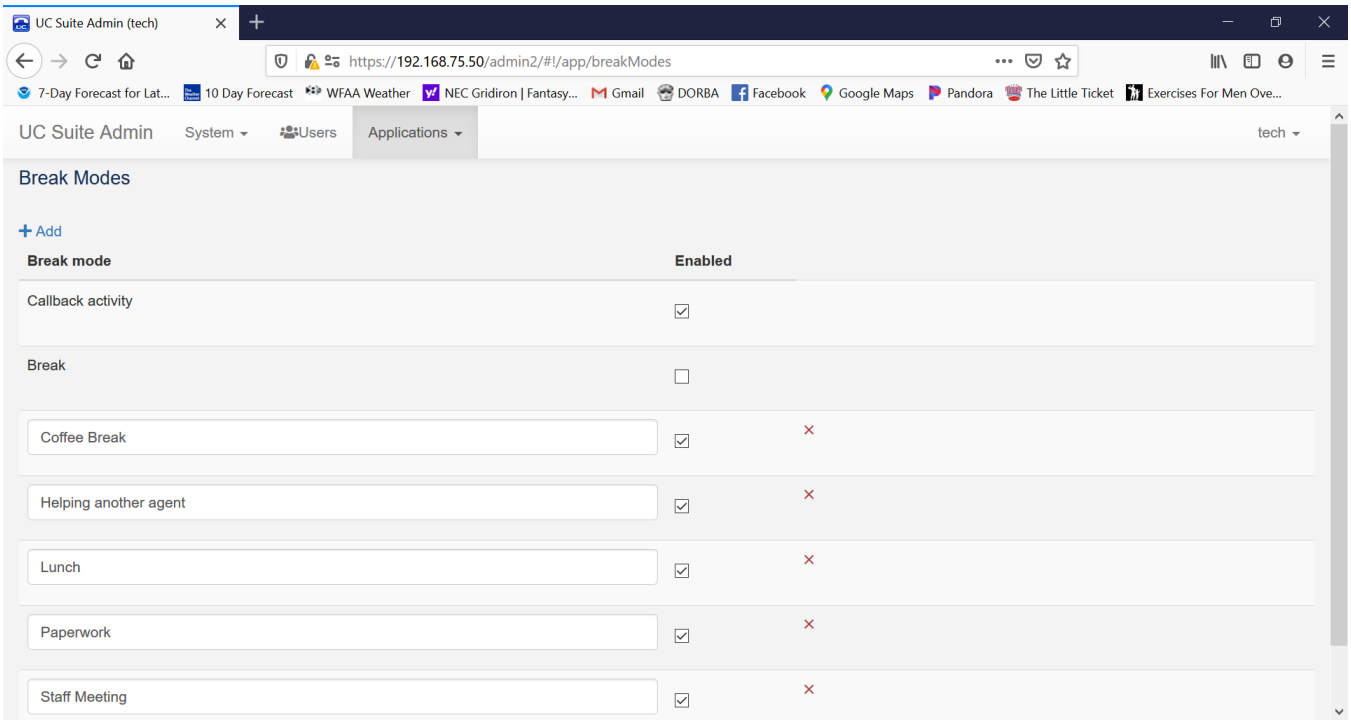
Figure 5-12 Queue Name Column



1.3.3 Break Modes

Selecting the Contact Center Break modes option displays a window allowing the administrator to define up to 10 custom Break Modes to indicate a reason an agent is not taking calls. For example, rather than just having a single Break state, a customer could allow the agent to designate Coffee Break, Lunch, Paperwork, etc. By recording this detail, the call center supervisor can better track workers activities. The Break Modes feature requires **feature code 2110**. Refer to the figure below for an example of the Break Modes window.

Figure 5-13 Break Modes Window



There are two pre-defined Break Modes: **Break** and **Callback Activity**. The pre-defined modes can be individually enabled/disabled. The **Add** button allows the administrator to create a new Break Mode entry. Each Break Mode is defined as a text string. The individual break modes can be enabled/disabled using the checkmark next to each entry. A Break Mode can be deleted by clicking the X next to the selected entry. The defined set of break modes apply to all queues and all agents. All Break Modes use the same default icon (Coffee Cup) to indicate the agent is in break mode within the web client application.

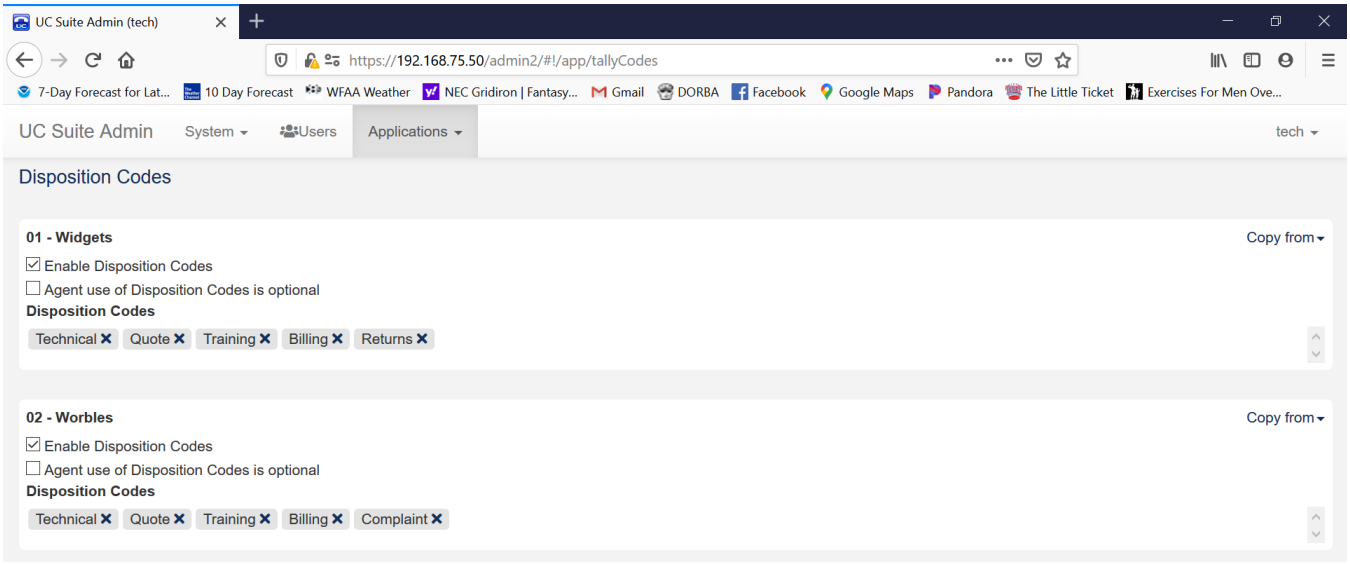
NOTE

There will always be a standard mode called simply "Break" that will need to be used whether Break Modes are enabled or not. If an agent goes into break by pressing the Break key on their phone, they will be designated in the standard Break mode.

1.3.4 Disposition Codes

Selecting the Contact Center Disposition Codes option displays a window allowing the administrator to define a maximum of 5 disposition codes, also known as Tallie codes, for each queue. Below is an example of the Disposition Codes window.

Figure 5-14 Example of Disposition Codes



Administrators can enable/disable the use of disposition codes per queue. The default is **disable** Disposition Codes for each queue. When Disposition Codes are enabled for a queue, the defined set of disposition codes will apply to all agents that are logged into that queue.

The **Add** function will create a new entry allowing the user to enter the text to be associated with the new disposition code.

The **X** next to each defined Disposition Code allows the user to remove the selected code.

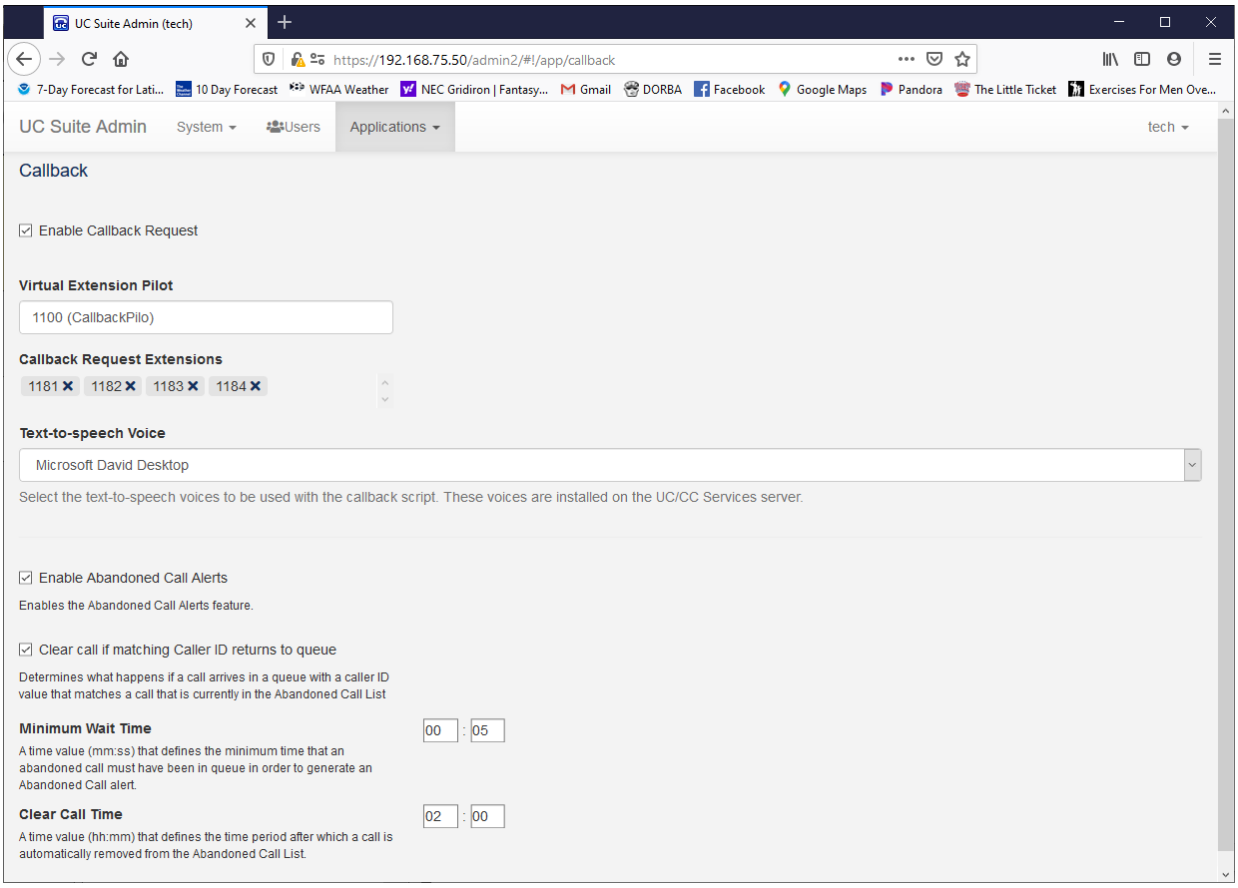
The **Agent use of Disposition Codes is optional** allows an agent to dismiss the disposition form without selecting a code. This field is **unchecked** by default.

The **Copy from** feature allows the administrator to set the Disposition codes for a queue to be the same as another queue. This shortcut keeps the administrator from having to repeatedly add the same set of codes for multiple queues.

1.3.5 Callback Request

Selecting the Callback Request option displays a window allowing the administrator to setup the Callback Request and Abandoned Call Alerts. The following image shows an example of the Callback settings menu.

Figure 5-15 Example of Callback Screen



The **Enable Callback Request** checkbox enables the Callback Request feature. The box is unchecked by default.

The **Virtual Extension Pilot** field specifies the virtual extension that has been setup in the SV9100 to receive the callers that dial out from queue to the callback request. UC Services identifies available SIP extensions that have been setup to support this feature.

The administrator selects which extensions from this list will be used as the **Callback Request Extensions**.

Text-to-speech Voice selects the text-to-speech voices to be used for the prompts played to the caller. These voices are installed on the UC/CC Services server.

The following settings correspond to settings for SV9100 system Program 20-61.

The **Enable Abandoned Call Alerts** checkbox enables the Abandoned Call Alerts feature.

The **Clear call if matching Caller ID returns to queue** checkbox determines what happens if a call arrives in a queue with a caller ID value that matches a call that is currently in the Abandoned Call List.

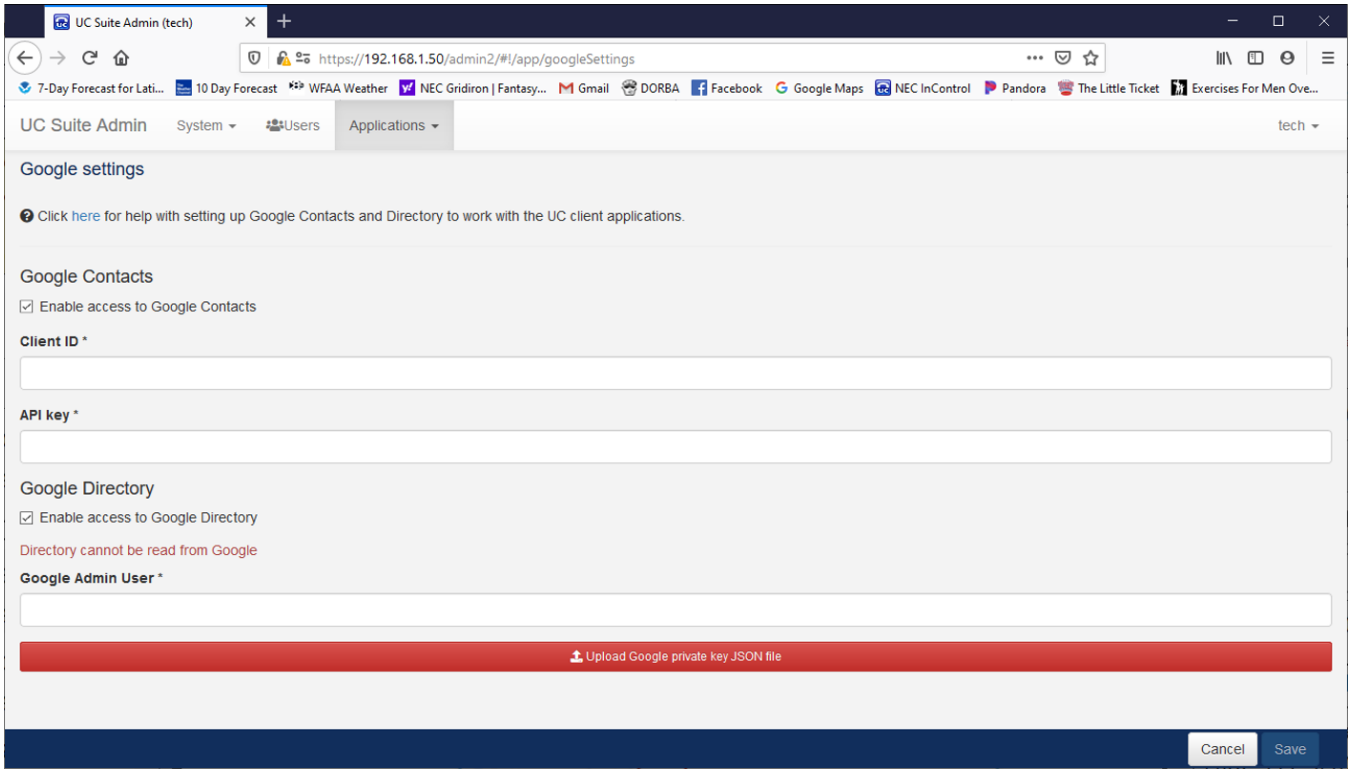
The **Minimum Wait Time** value (mm:ss) defines the minimum time that an abandoned call must have been in queue in order to generate an Abandoned Call alert.

The **Clear Call Time** value (hh:mm) defines the time period after which a call is automatically removed from the Abandoned Call List.

1.4 Google Settings

With UC Suite version 6.X and higher, UC Services is integrated with G Suite to provide clients access to Google Users (Directory) and Contacts. Bellow is an example of the Google Settings Window.

Figure 5-16 Example of Google Settings



To Enable Google Directory in UC Server, check the **Enable access to Google Directory** check box.

Enter the email address of the **Google Admin User**.

Click on the red bar to **Upload the Google private key JSON file**.

To Enable Google Contacts in UC Server, check the **Enable access to Google Contacts** check box.

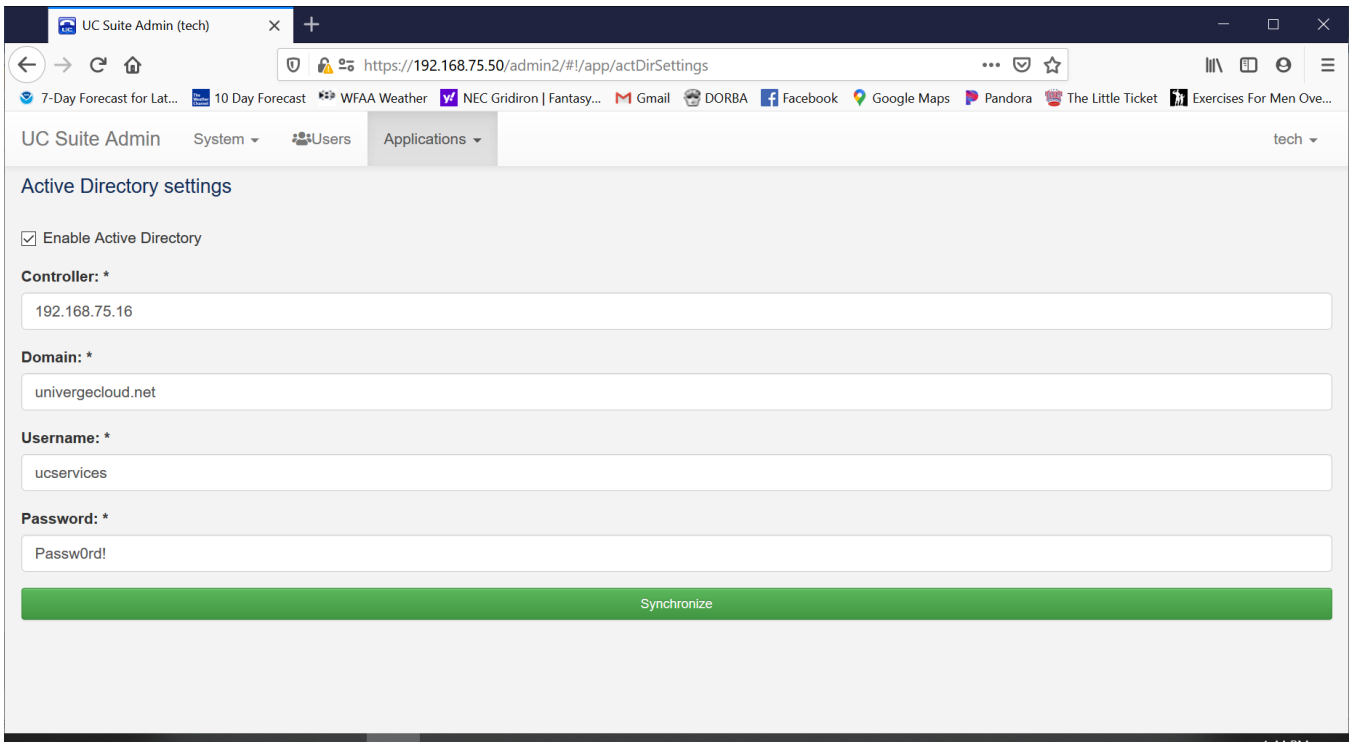
Enter the **Client ID** and **API Key**.

Refer to the Online help file or the Google G Suite Integration chapter of the UC Suite manual for more information.

1.5 Active Directory Settings

The Active Directory Settings option opens a window that allows the administrator to define the settings required to communicate with Active Directory. Below is an example of the Active Directory settings window.

Figure 5-17 Example of Active Directory



The **Enable Active Directory** check-box enables the Active Directory Integration.

Enter the **IP address** of the Active Directory server in the Controller field.

Enter the **Active Directory Domain Name** in the Domain field.

Enter the **User Name** and **Password** for an domain account that has access to Active Directory in the Username and Password fields.

Once complete click **Synchronize** to save with Active Directory.

NOTE

UC Suite will only query the AD Security Group named "SV9100". This will allow AD administrators to have only a subset of AD users intended to be SV9100 users. Refer to the UC Suite manual for more information.

Account Functions

Chapter 6

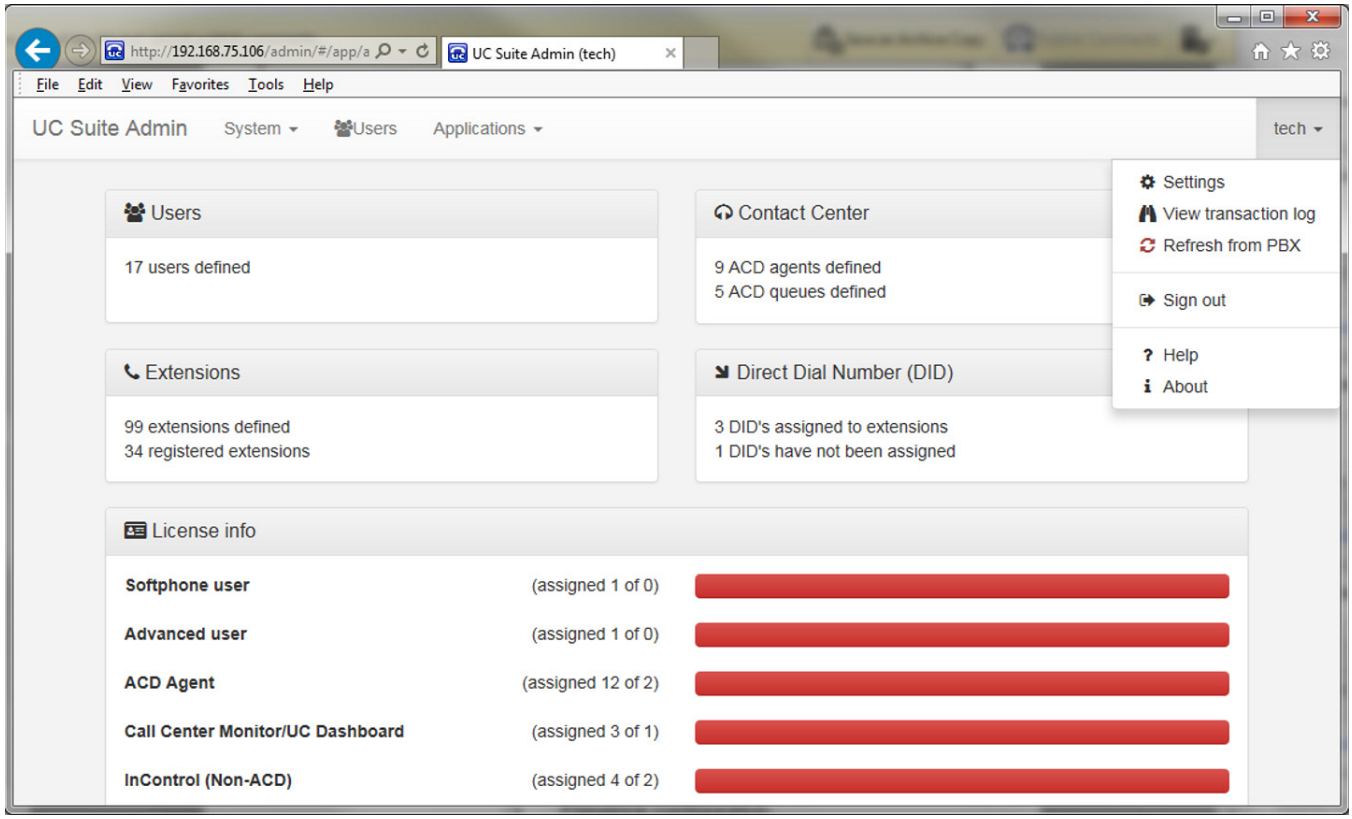
SECTION 1 OVERVIEW

On the right-hand side of the main menu, the Login ID is displayed and has a drop-down menu that provides access to additional account functions. The following functions can be accessed from this drop-down menu.

- ❏ Settings
- ❏ View Transaction Log
- ❏ Refresh from PBX
- ❏ Sign Out
- ❏ Help
- ❏ About

The following image shows an example of the Account Functions menu.

Figure 6-1 Account Functions Screen

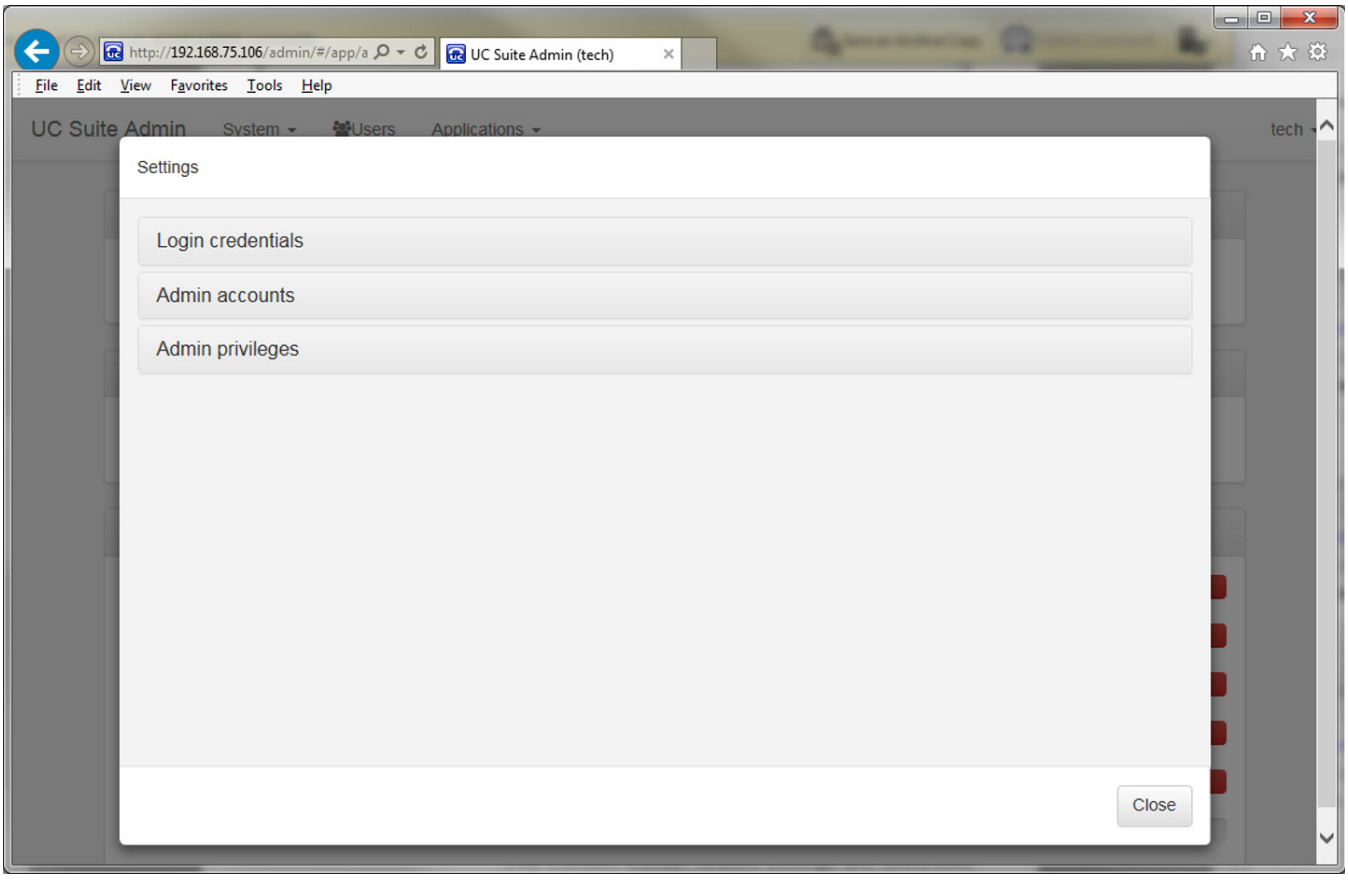


Each of these functions is further defined in the following sections.

1.1 Settings Function

The Settings function allows the Installer Level user to define programming areas available to lower level Admin users. The following image shows an example of the menu displayed when this option is selected.

Figure 6-2 Settings Screen

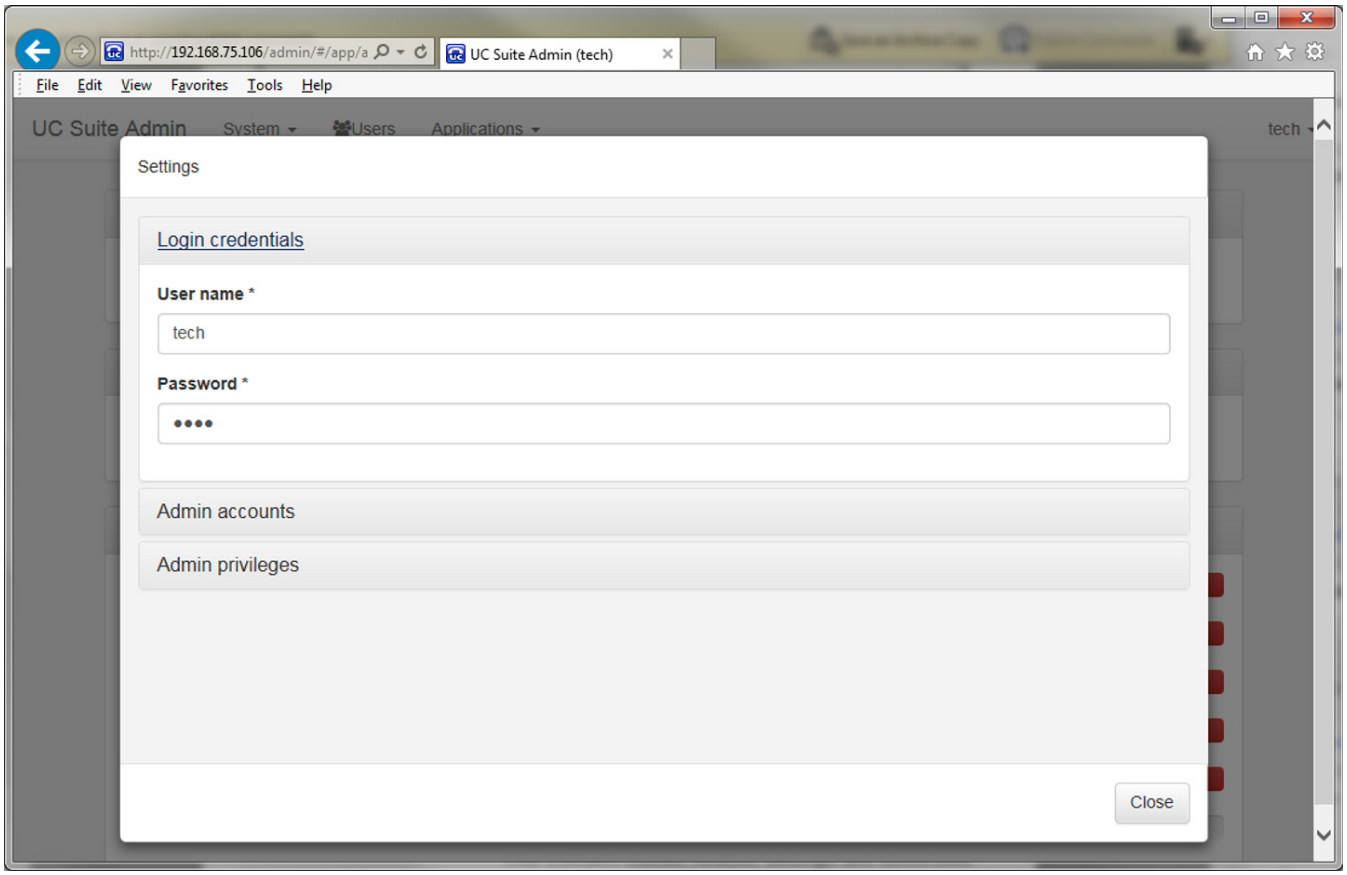


Each of these Setting categories is further defined in the following sections.

1.1.1 Login Credentials

The Login Credentials menu allows the user to update the name and password associated with this user account. The following image shows an example of the menu displayed when this option is selected.

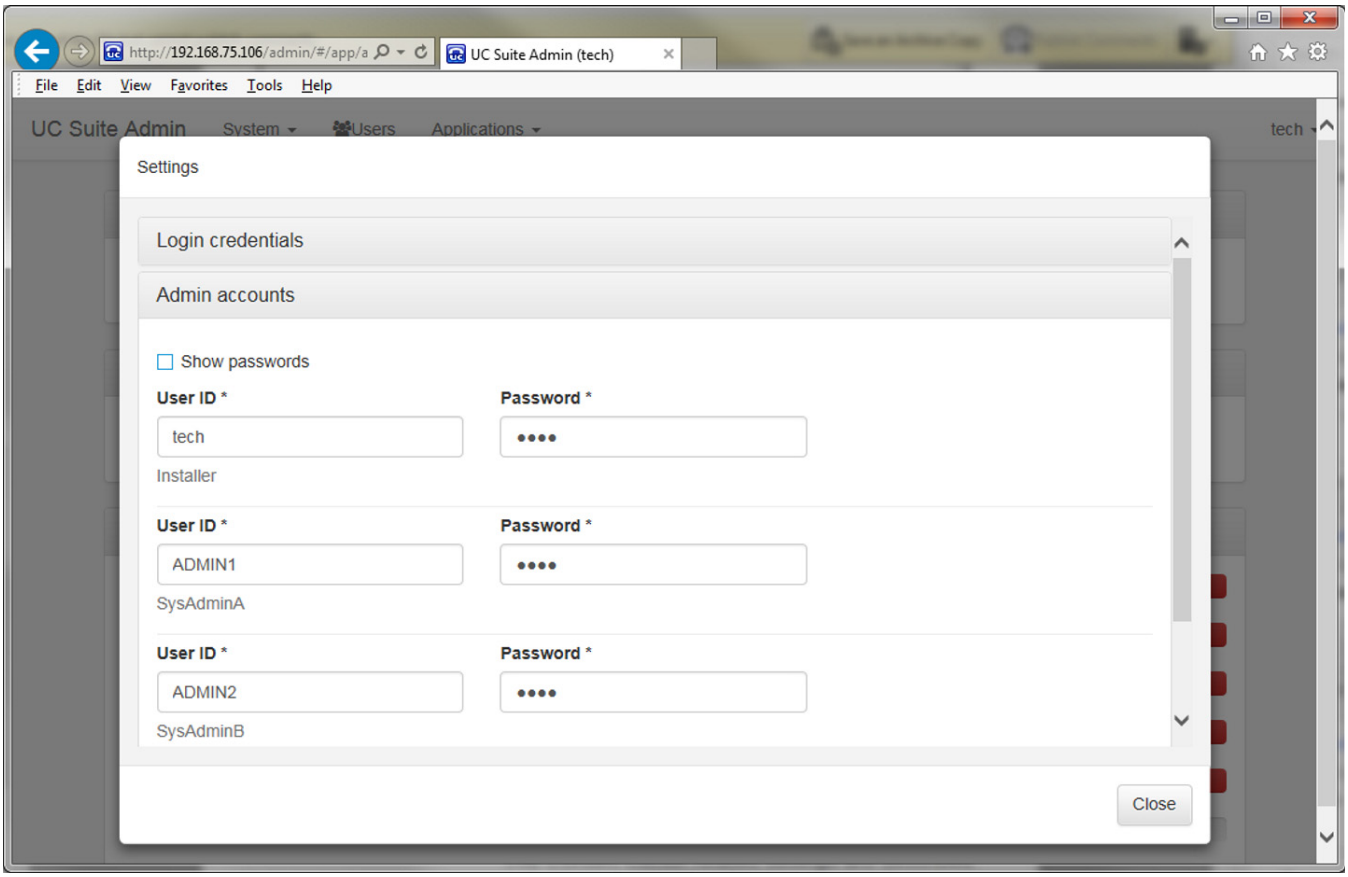
Figure 6-3 Login Credentials Screen



1.1.2 Admin Accounts

The Admin Accounts menu allows the Installer Level user to update the name and password for all Installer and System Administrator level accounts. This menu includes an option “Show Passwords”, and allows the administrator to view the current password strings. The following image shows an example of the menu displayed when this option is selected.

Figure 6-4 Admin Accounts Screen



1.1.3 Admin Privileges

The Admin Privileges menu allows the Installer Level user to enable/disable programming sections within the Admin utility for access by System Administrator level users. The following programming sections can be enabled/disabled:

System

- ❒ Login Credentials
- ❒ PBX Date/Time
- ❒ Trunks
- ❒ Direct Dial Number Assignment
- ❒ Button Feature Keys
- ❒ Class of Service

- ❒ Class of Restriction
- ❒ Day/Night Labels
- ❒ View Transaction Log

Extensions

- ❒ Contact Information
- ❒ Voicemail
- ❒ Call Handling
- ❒ Class of Service
- ❒ Buttons

UC

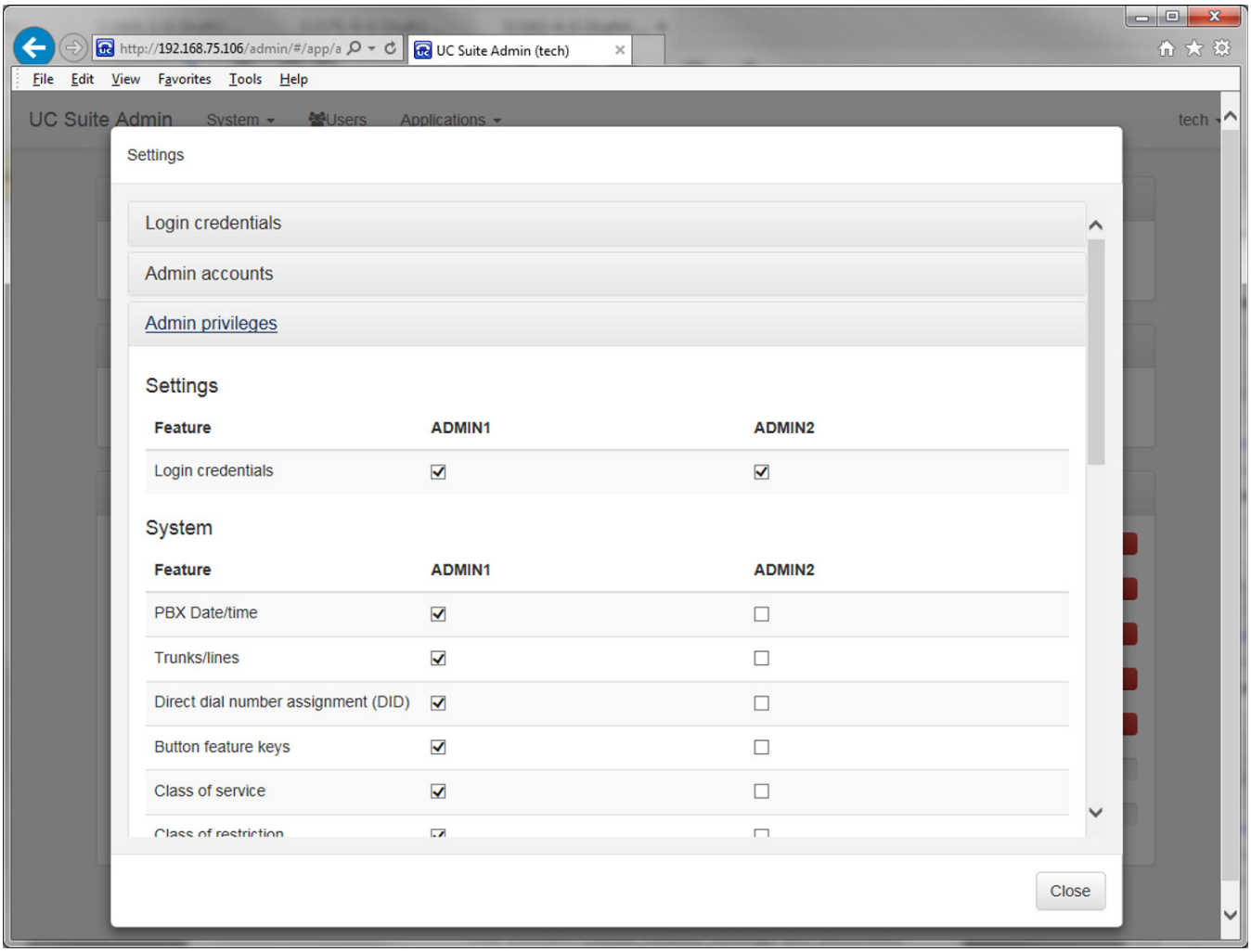
- ❒ Users
- ❒ Presence

Contact Center

- ❒ Agents
- ❒ Queues

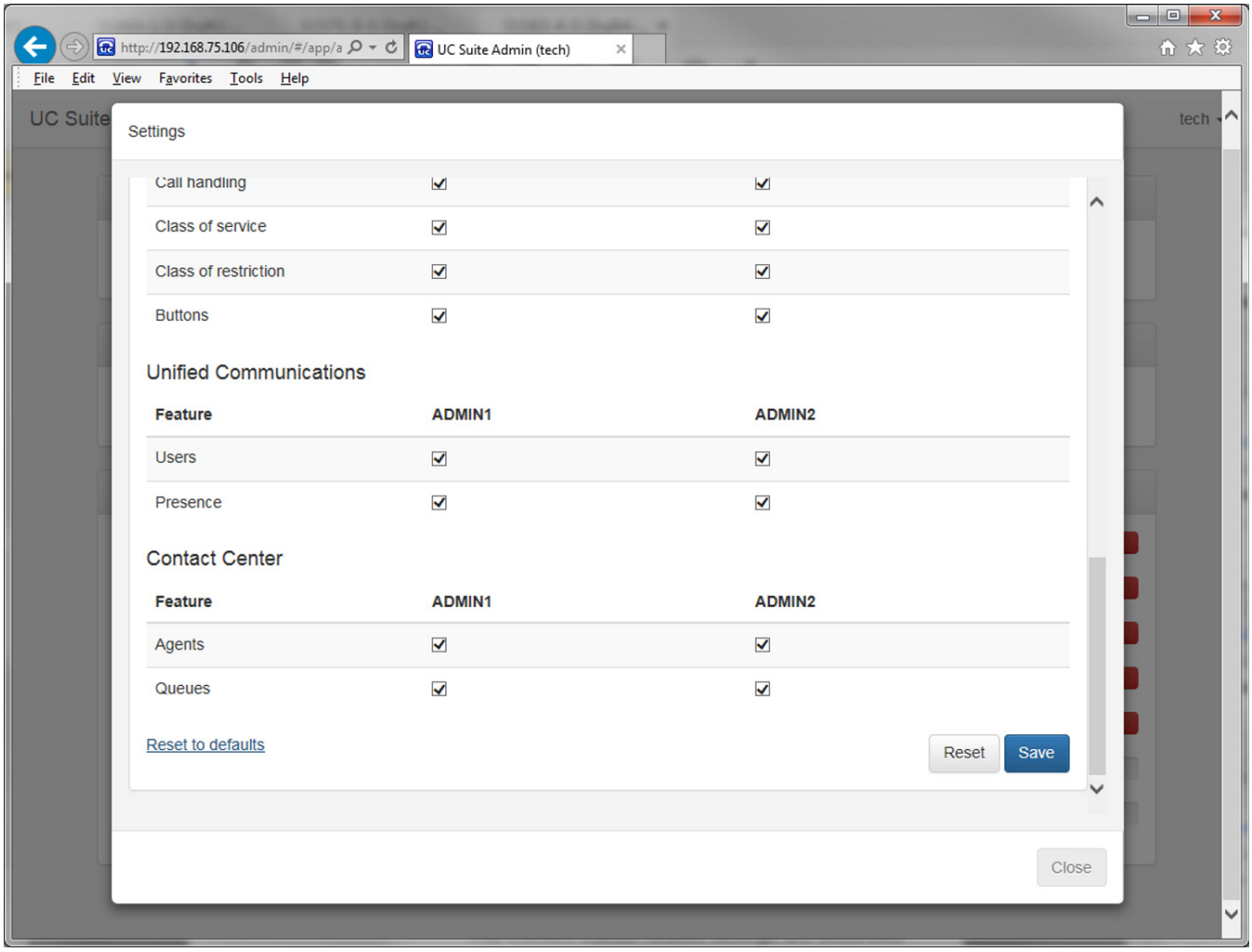
The following image shows an example of the menu displayed when this option is selected.

Figure 6-5 Admin Privileges Screen



This menu also provides an option to reset all values to their default state.

Figure 6-6 Settings Menu



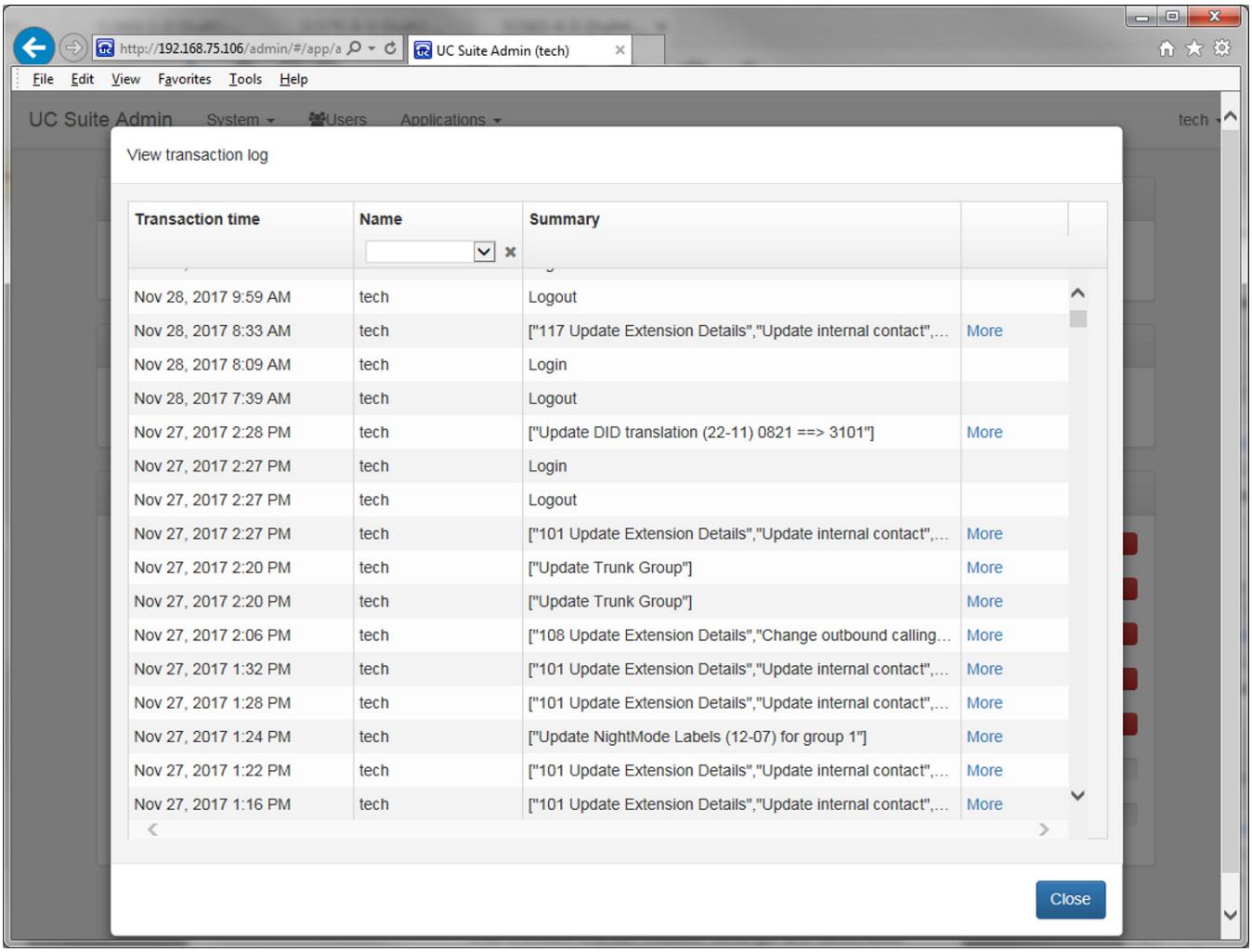
1.2 View Transaction Log Function

The View Transaction Log function displays a list of the recent programming changes made within the Admin application. For each update, the log table lists the following information:

- Transaction Time
- User Name
- Summary of Action

The following image shows an example of the menu displayed when this option is selected.

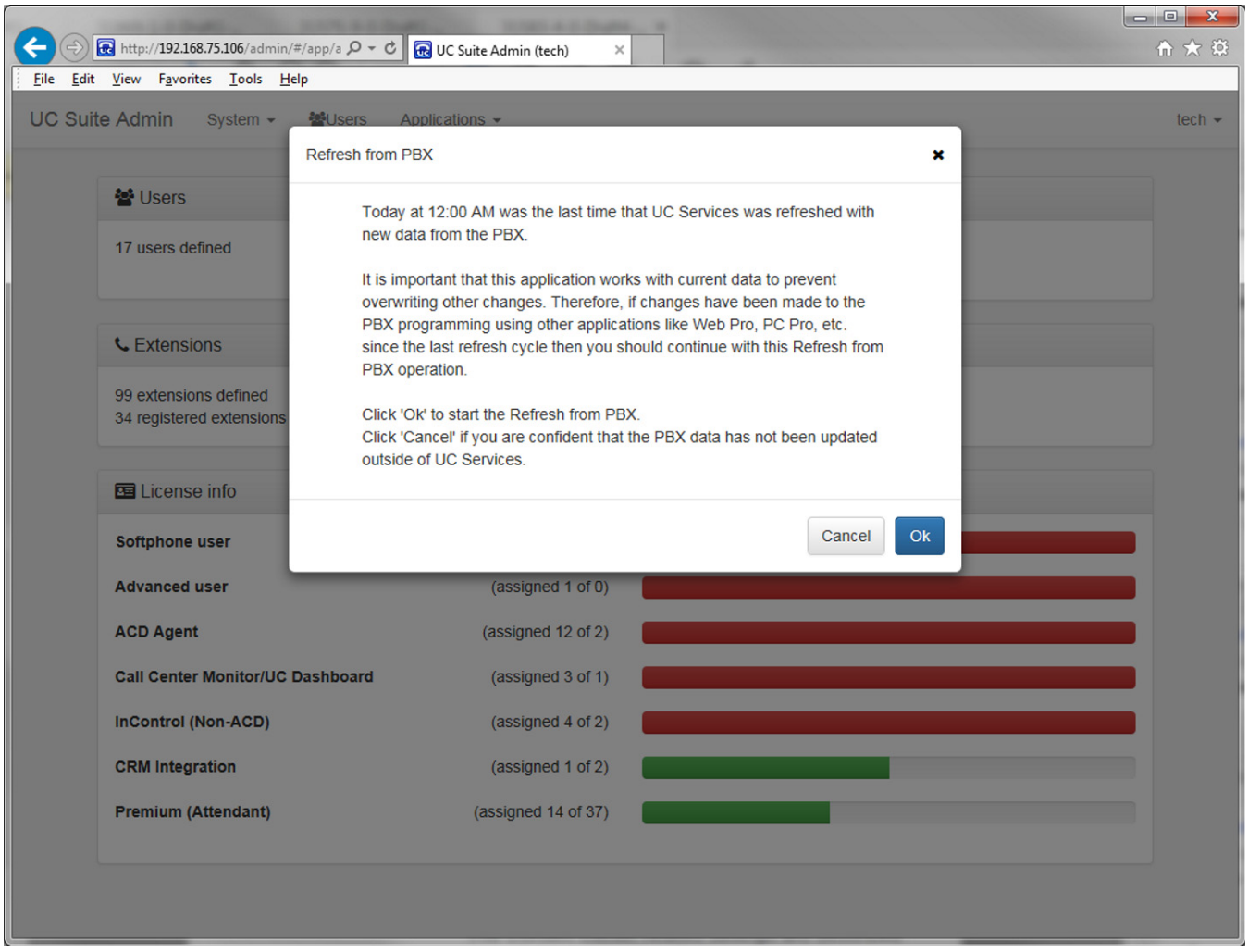
Figure 6-7 Example of View Transaction Log



1.3 Refresh from PBX Function

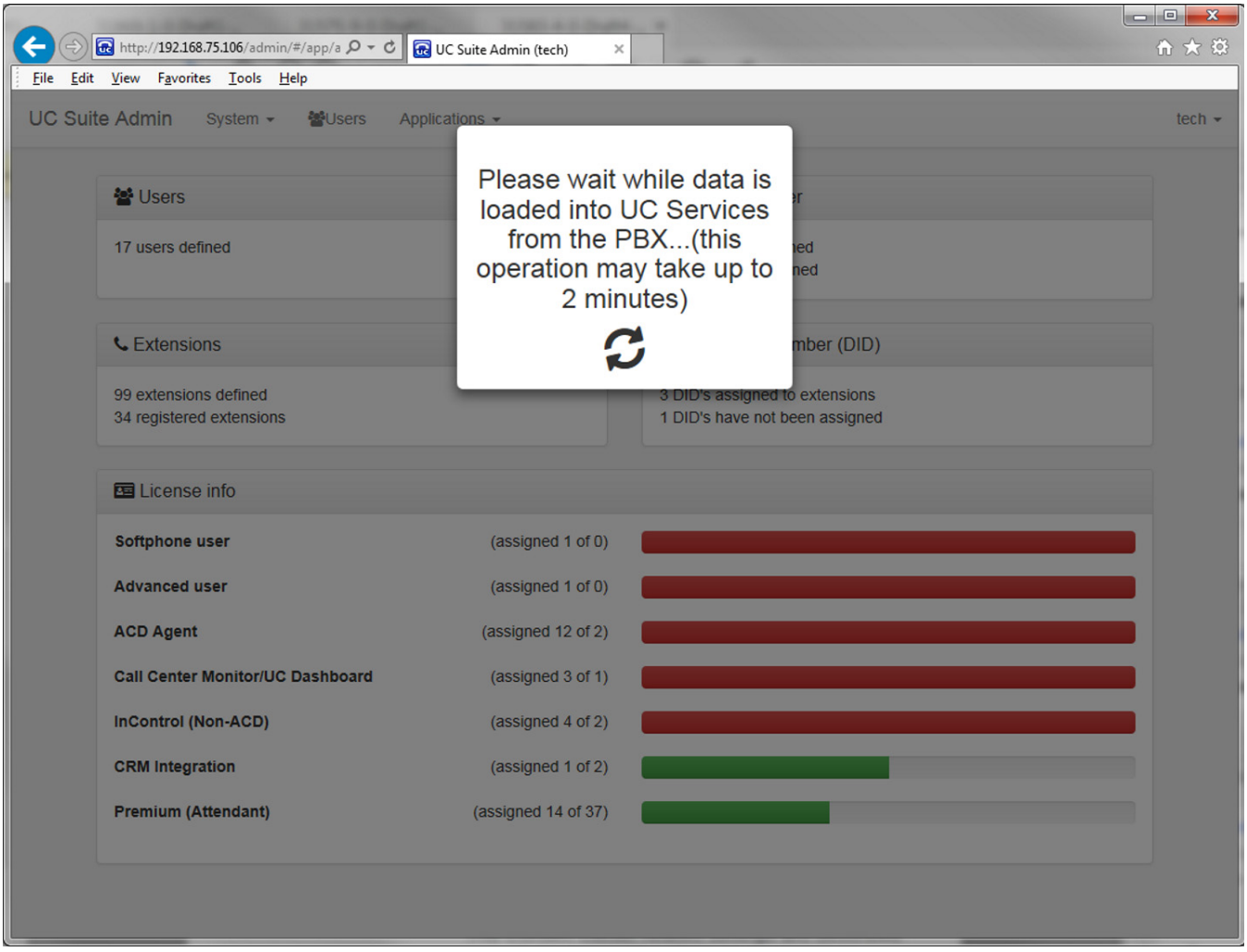
UC Services refreshes the SV9100 data every night at midnight. The Refresh from PBX function also accesses SV9100 programming to read current system values and update the local storage within the Admin utility. This action is performed to ensure the Admin utility displays the most current information that has been saved in the SV9100. For example, if users make changes to UC users using WebPro or PCPro, this function can be used to make sure the latest values are displayed within Admin. The following image shows an example of the menu displayed when this option is selected.

Figure 6-8 Refresh from PBX Screen



Clicking OK will initiate the Refresh from PBX function. The following image shows an example of the message displayed as the refresh is happening. Once complete, the user will be required to re-Login to the Admin Utility.

Figure 6-9 Initiate Refresh from PBX



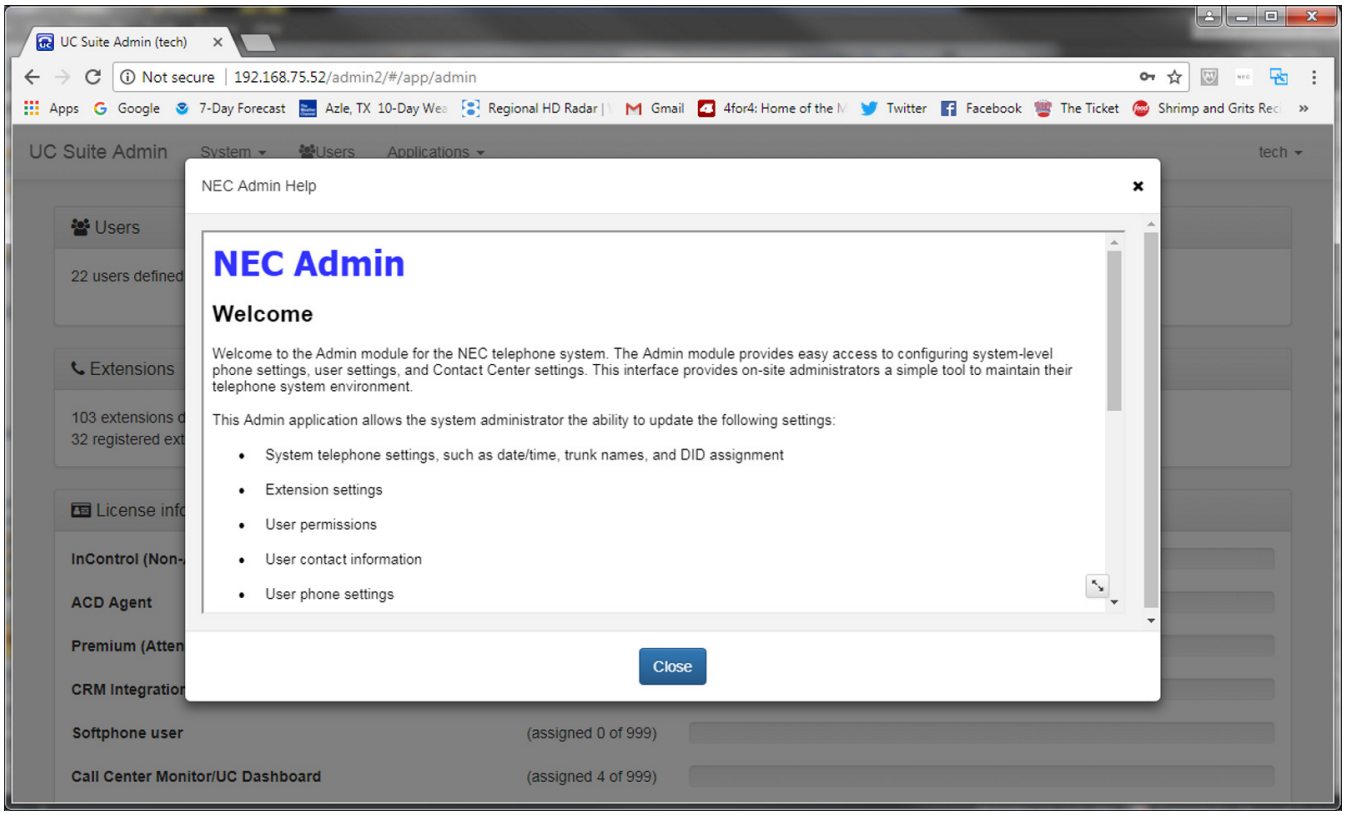
1.4 Sign Out Function

The Sign Out function logs the user out of the Admin application and returns to the Login screen.

1.5 Help Function

The Help function opens a window that provides information about the operation of the Admin application.

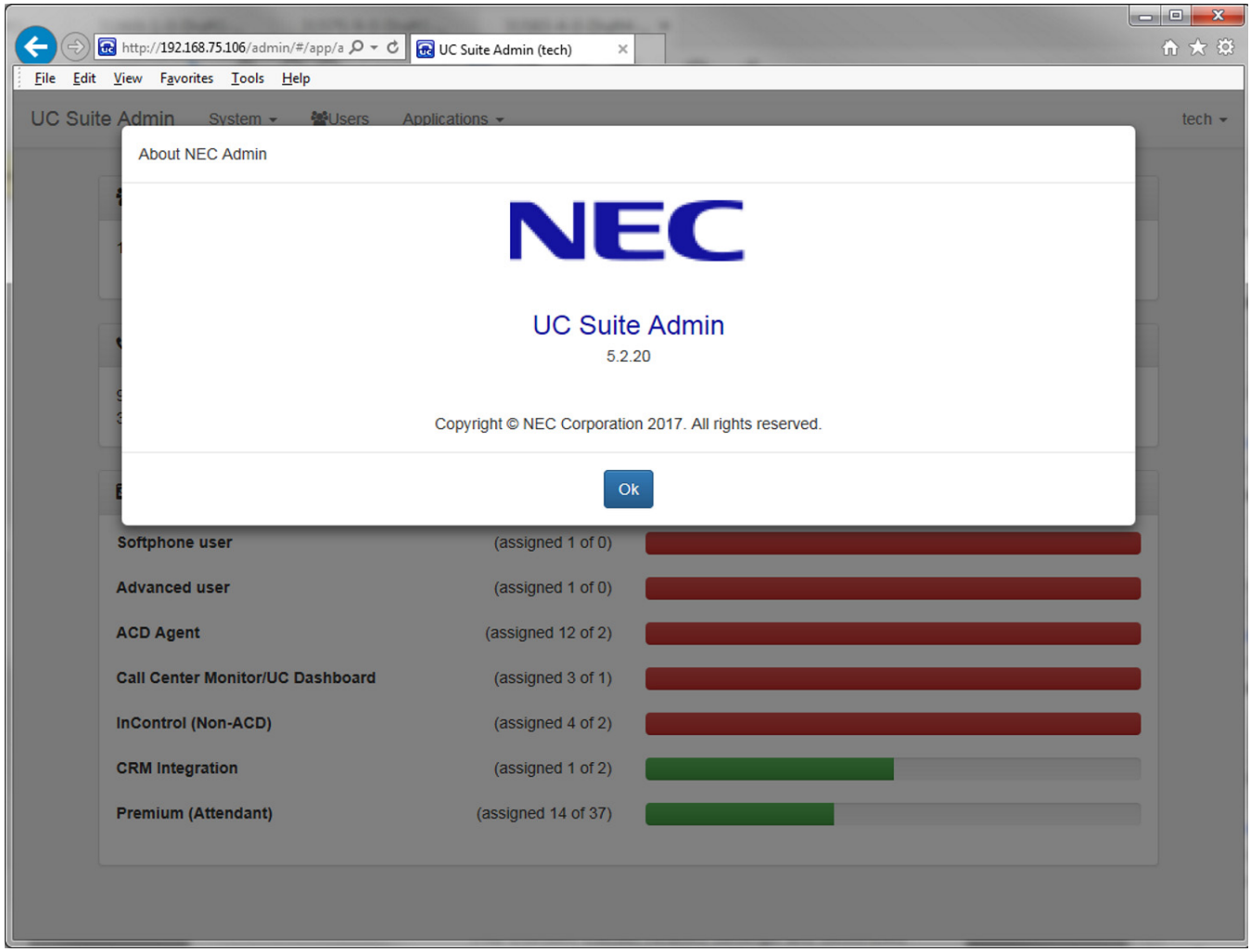
Figure 6-10 Admin Welcome Screen



1.6 About Function

The About function opens a window that displays the copyright notice and version number of the Admin application. The following image shows an example of the menu displayed when this option is selected.

Figure 6-11 About Screen



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UC Suite Admin Utility Manual

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