



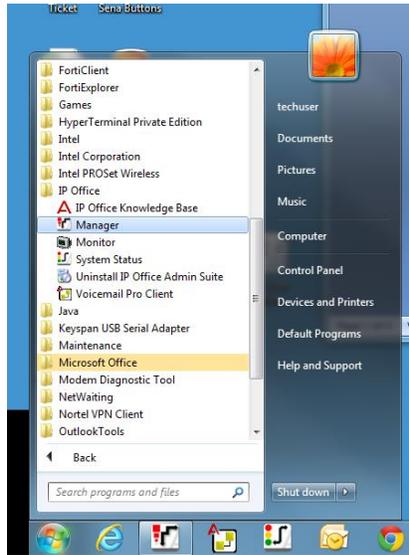
IP Office (11) Manager User Guide

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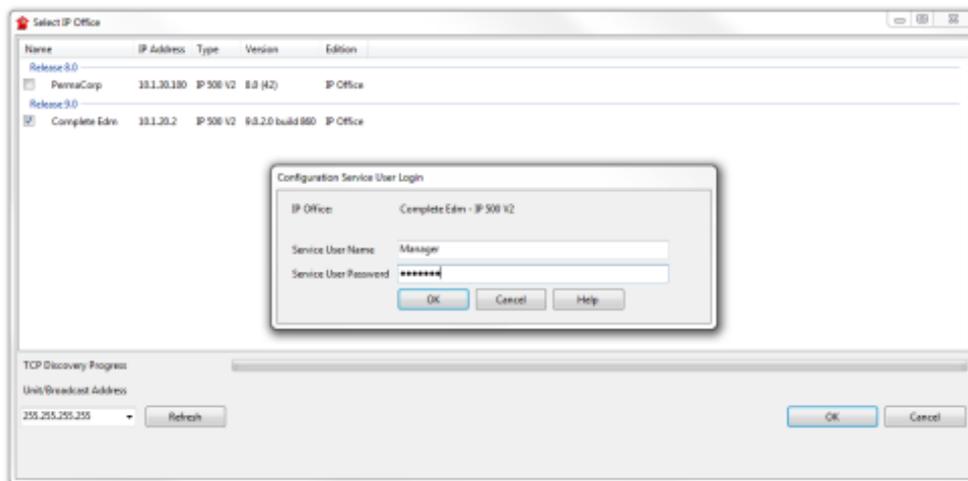
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Logging Into the IP Office

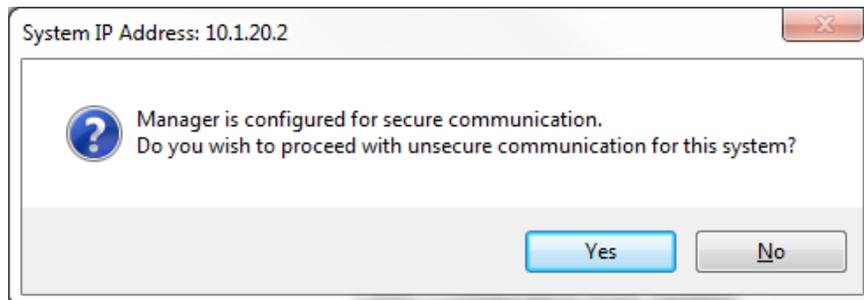
You may log into the IP office through a Shortcut on your Desktop/Taskbar or if there is no shortcut the program can be accessed under the Start Menu > All Programs > IP Office > Manager.



Once Opened, you should be prompted with a login screen with the phone system name where you would enter the Username of “Manager” As well as the Password of “Manager”. For Prior Cardinal Customers the Username will be “ipoadmin” with the password of “ipo@dm1n”



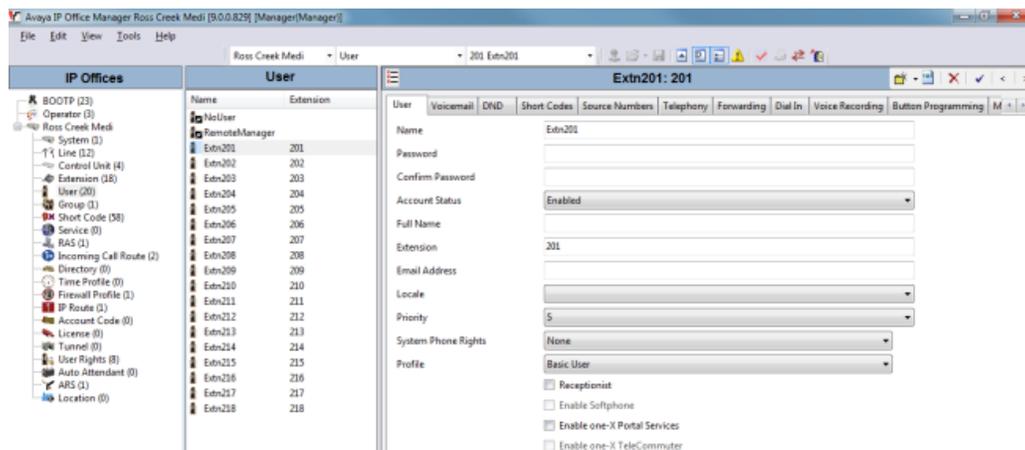
If prompted by a “Manager is configured for secure communication” box click “Yes” to continue



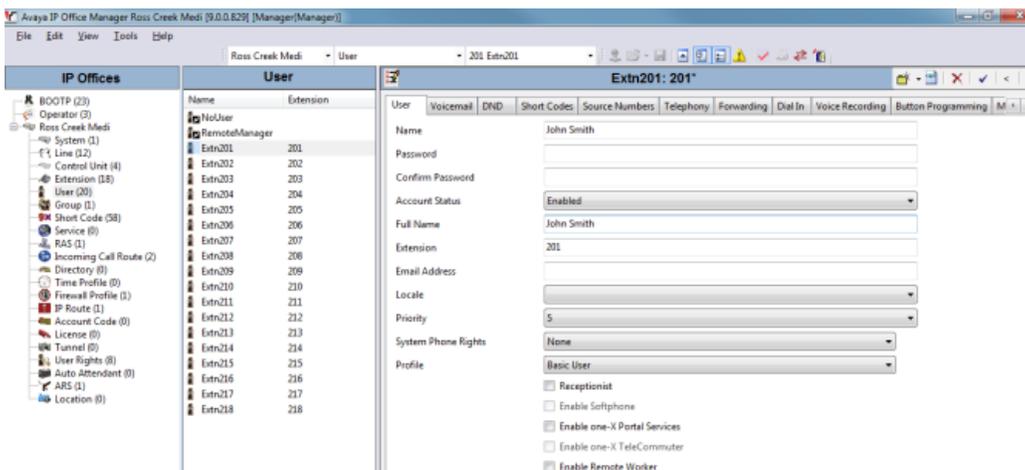
Changing Usernames and Emails

Once logged into the system you will be able to access the users through the user tab on the left hand side. From here we can use Extn201 as an example and change the name to John Smith. We would change the Name and Full Name Accordingly. It is best to use the person's first and last name in both places to avoid confusion across multi site locations. As well if voicemail to email is configured we would edit these settings under the "Voicemail" tab

Step 1



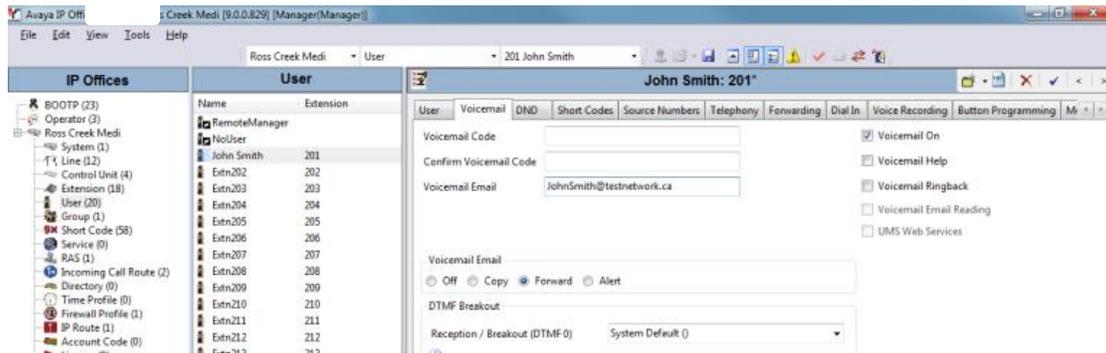
Step 2



Step 3 (Editing the Voicemail Settings)

These settings would be modified if there is a password protected mailbox that needs to be cleared or updated, if an email address is changed, or if Voicemail to email settings need to be reconfigured. Within the tab, Voicemail Code and Confirm Voicemail Code would be the password set on the specific mailbox. If blank there would be no password set on the mailbox.

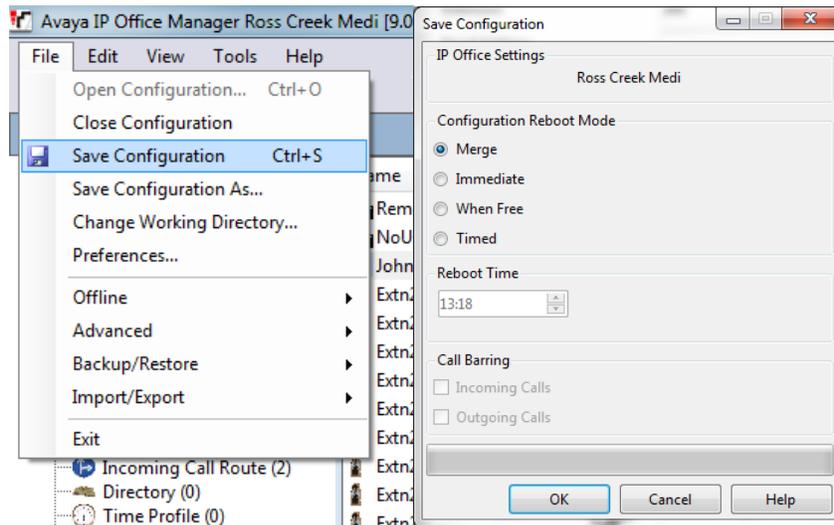
Voicemail Email is the address to which we can have Voicemails sent to a users email client. Once an Email Address is put in we have four options, **Off** being where all messages are left at the user’s desk phone; **Copy**, where voicemails are left at the desk phone and sent to the users email; **Forward**, where all Voicemail messages are forwarded to the users email and not stored on the phone, and finally **Alert**, where the user is sent an Alert email notifying them that they have received a voicemail and the voicemail itself is stored on the users phone.



In the above instance voicemails would be directly sent to JohnSmith@testnetwork.ca and he would have no voicemail password set.

Step 4

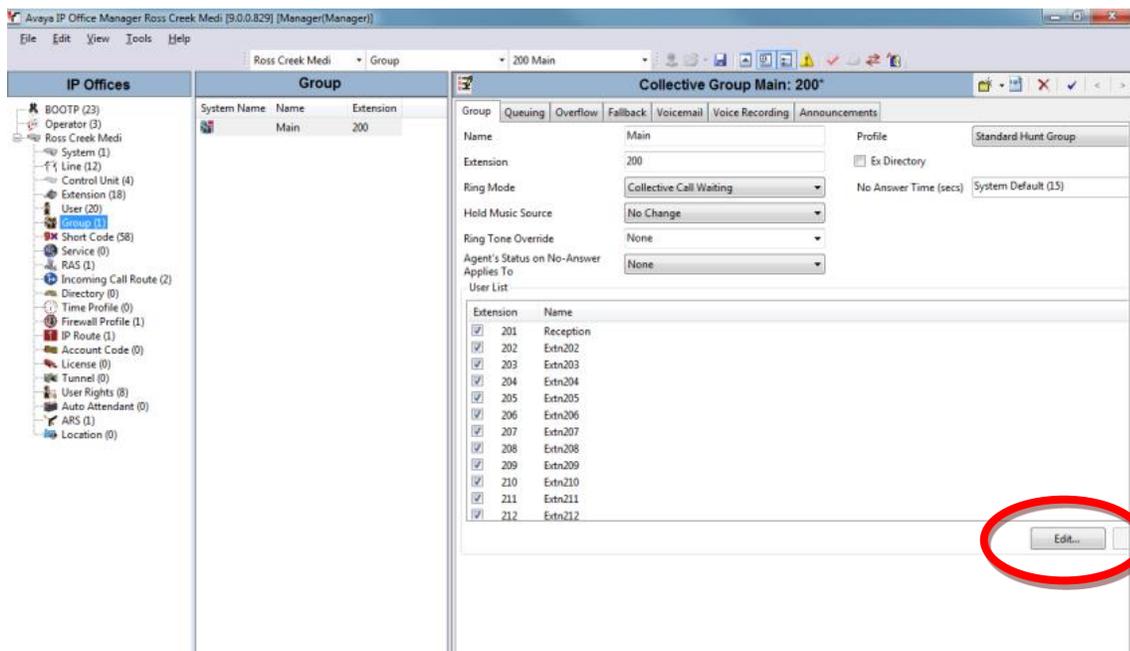
Once edited, to save the changes you press the okay button in the bottom left and the go up to **File>Save Configuration**, and then choose “**Merge**” from the save configuration screen. The updated names will then be applied after the merge.



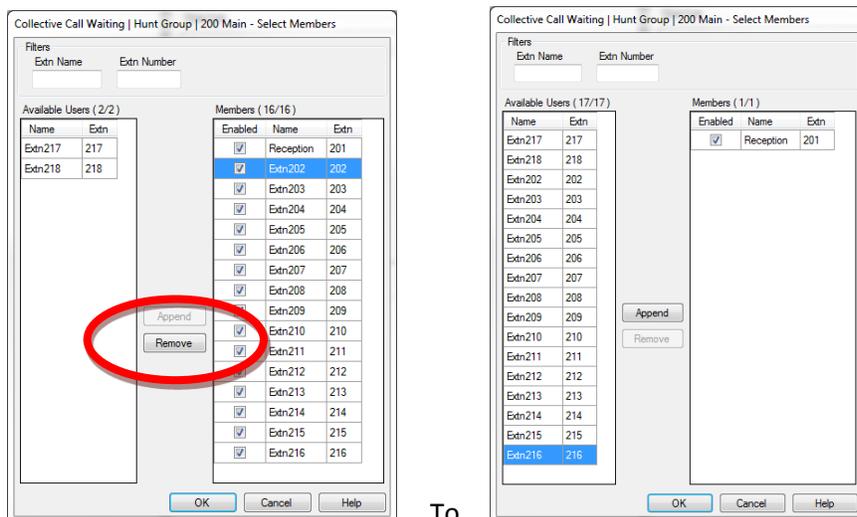
Changing Hunt Group Members

In situations where you need to add or remove people from ring groups it would be done through the **Group** tab in the Manager. This would be useful when additional people need to be able to receive calls for a specific group. For example; a Main group that is alerted when the main group is called.

In this example we will change the Main Group which currently sends calls to many users to just the receptionist. Once we are in the group tab we will be able to see an edit button that will allow us to dial down the members to just the receptionist.

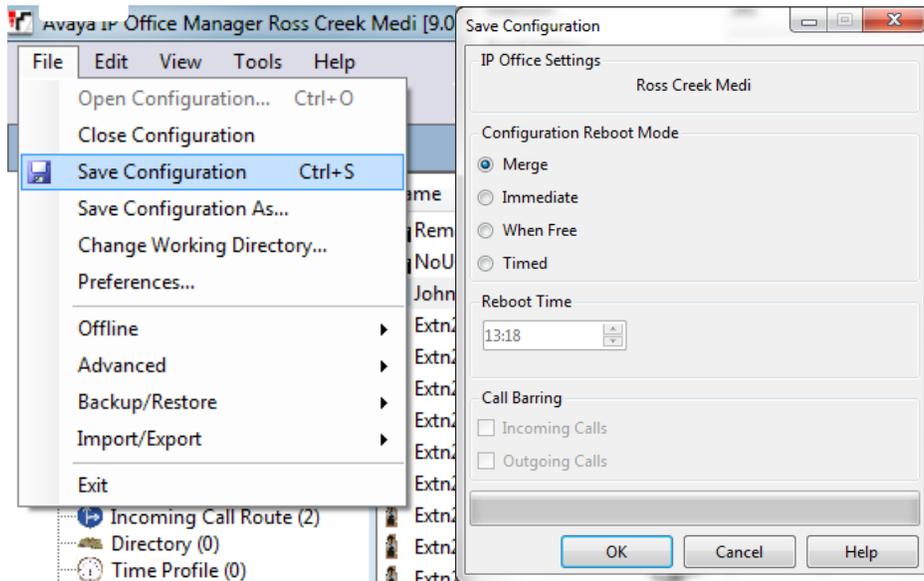


Once in the Editing Menu we can then remove them by Double clicking on their name or by the **Remove** Button. Once finished removing everyone we then hit the **Ok** Button.



To

To finalize the save, we then would hit **OK** in the bottom right of the screen, then save the configuration through **File > Save Configuration**. Finally, select, **Merge** the settings and hit **OK**.

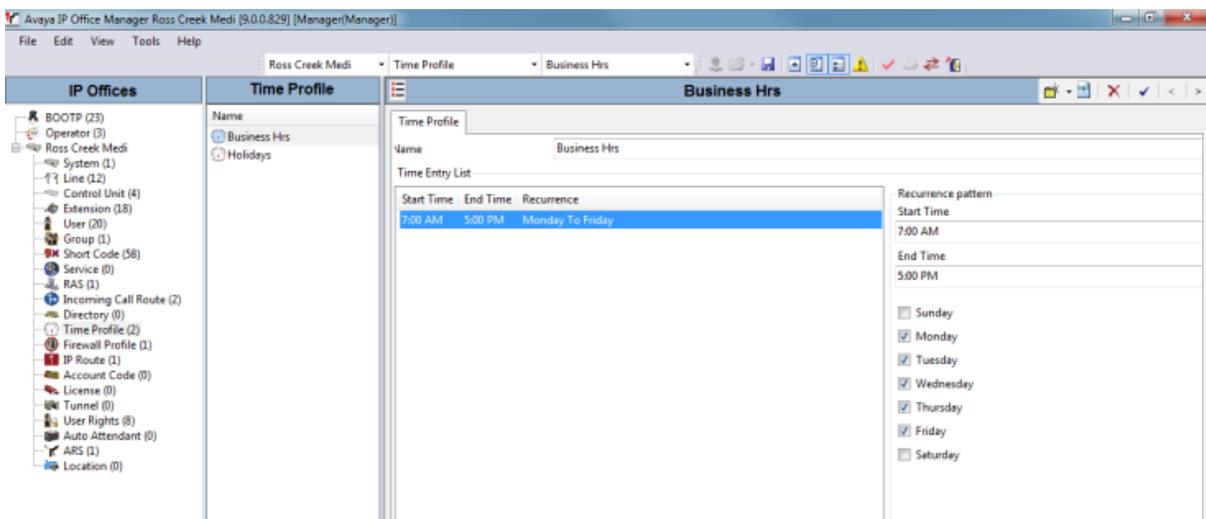


Editing Time Profiles and Holidays

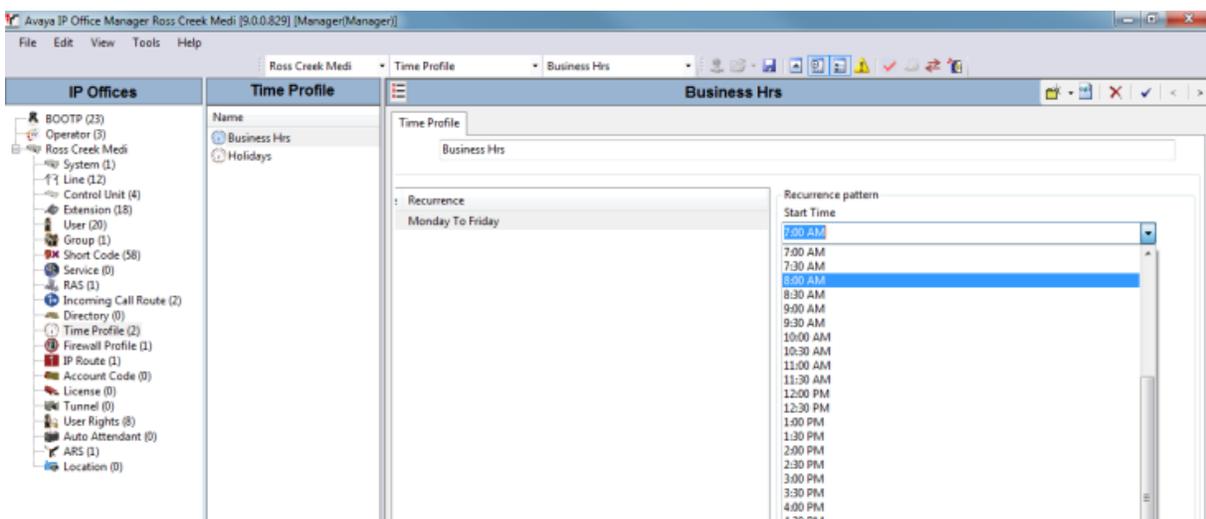
In scenarios where business' have night service or after hours greetings that play outside of business hours they are normally controlled through time profiles. Anything within the Business hours or holidays will affect how the phone system operated during these times/dates.

In this case, a business that is normally open 7am to 5pm is cutting back their hours to 8 am to 4 pm. To do this we would go into **Time Profiles** and under the **Business Hours** we would go in and make the adjustment. **Start Time** and **End Time** would be the things we need to change in this scenario.

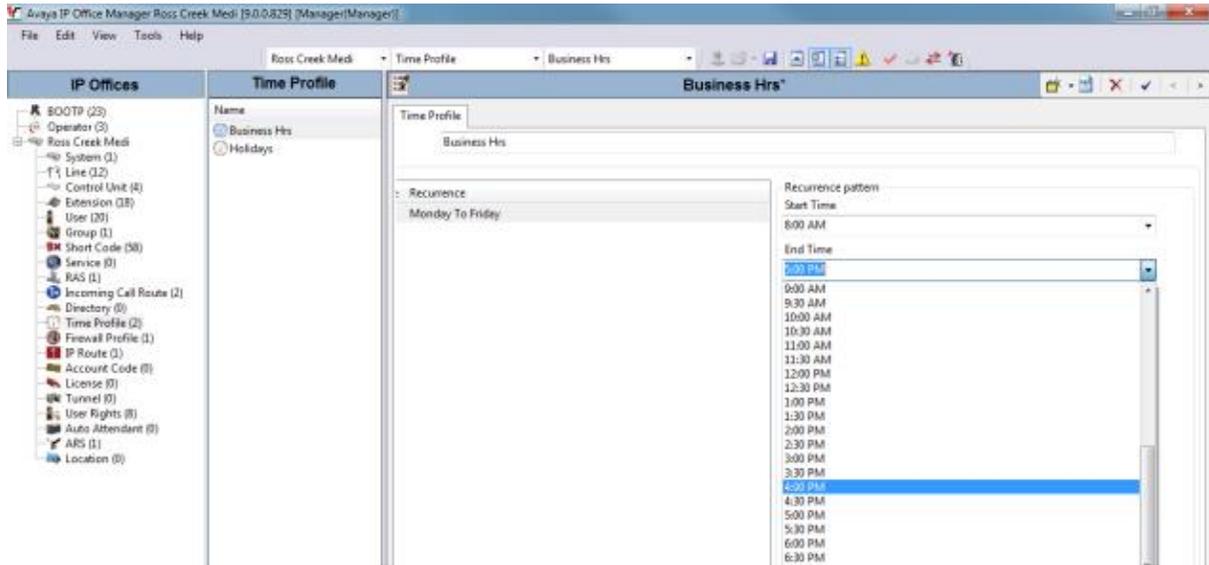
Step 1



Step 2

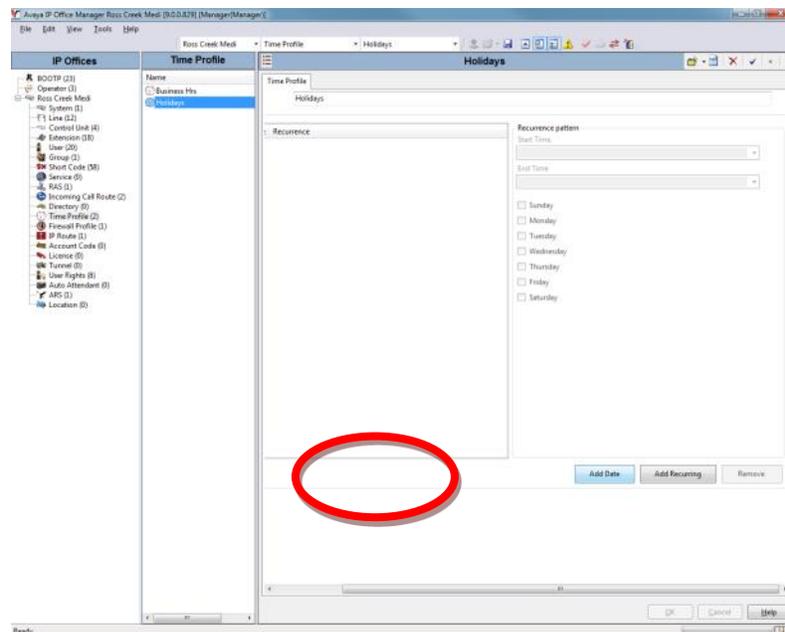


Step 3



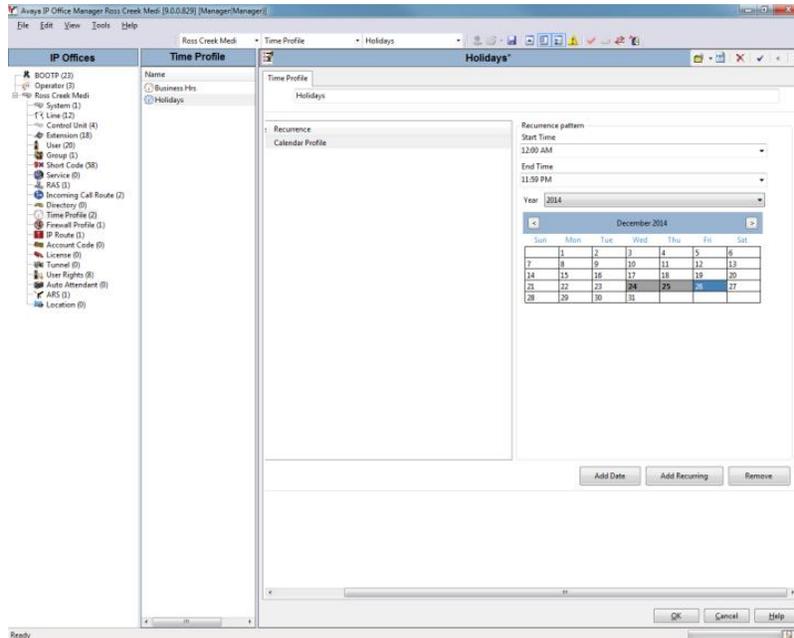
To add **Holiday Dates** we would add them through the **Holiday Profile** by the “**Add Date**” button within the profile. In this instance we can add dates around Christmas; that the company would be closed and therefore, will need the closed greeting played . You can navigate the calendar through the left and right tabs on either side of the month and select dates by double clicking them. When a date is properly selected it will then be highlighted grey.

Step 1



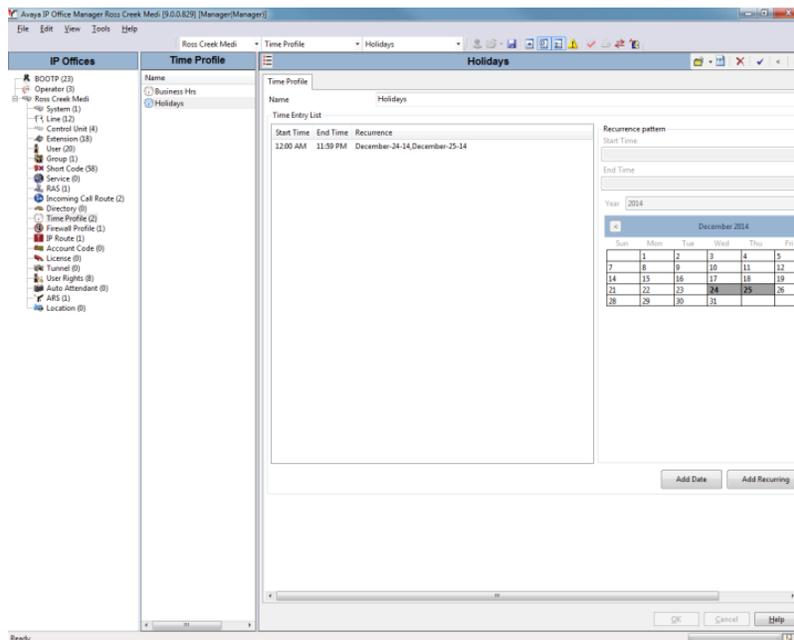
Step 2

After selecting the dates we would then hit the **OK** button



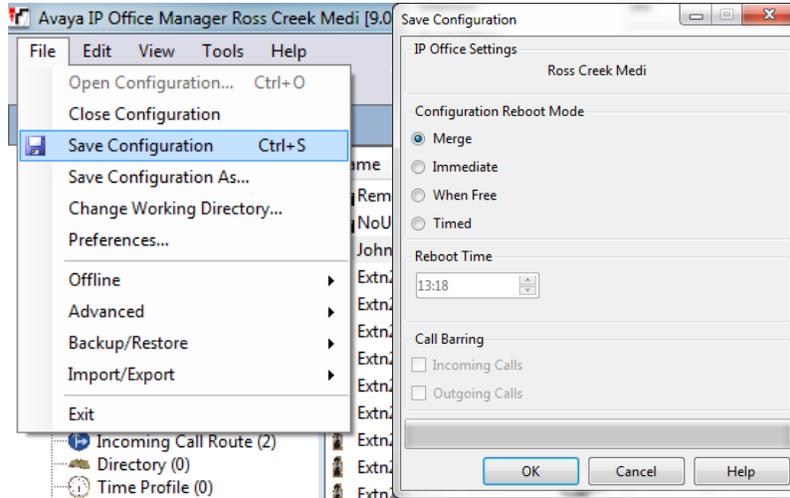
Step 3

Here we can see the Holiday dates added and then proceed to merging the changes.



Step 4

Saving the changes

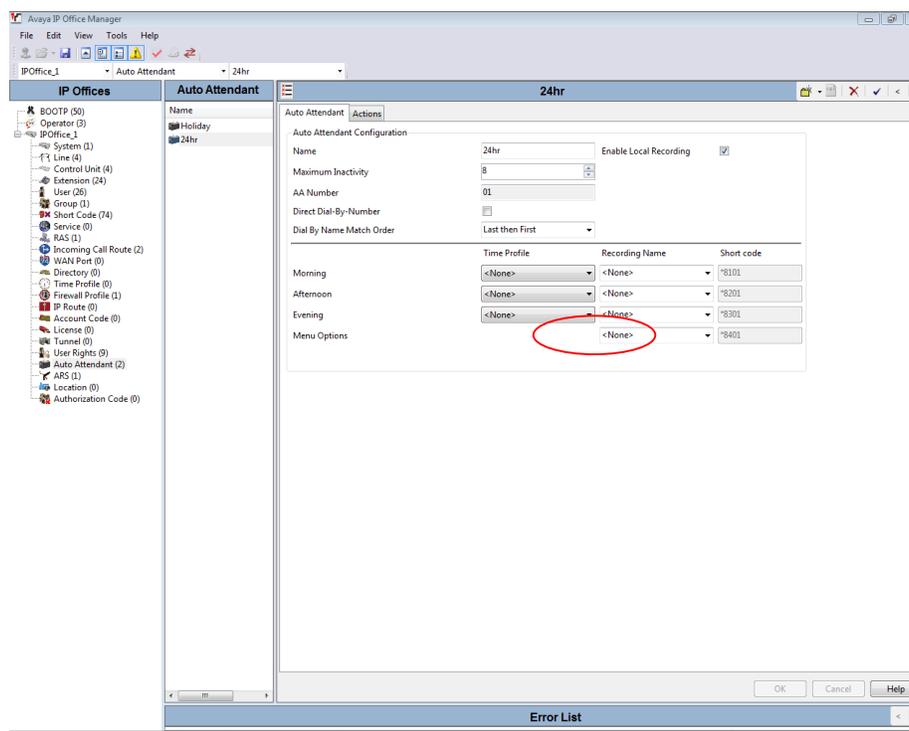


Editing Company Greetings

Company Greetings, if configured, may be changed one of two ways. Depending on install date and voicemail type (Embedded or Pro) greetings will be accessed through *699 which will bring you into a pre recorded greeting menu or you will access greetings through a *8XXX code. These recording menus are Customer specific so no two are alike however the basic principal still applies.

For Voicemail Pro systems they will always utilize the *699 Shortcode which may be dialed from any handset. You may be prompted for a password, in most cases this password will be 23646.

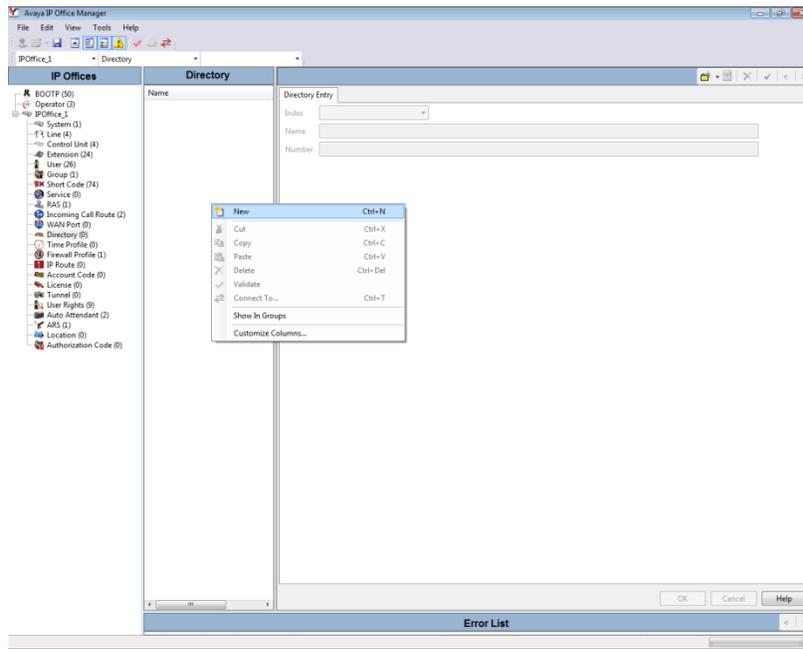
For Embedded systems (Pre 2015) Company Greetings will be accessed through *8XXX codes, otherwise they would be accessed through the *699 code as well. These codes are dependent on the types of greetings the company requires. In **most cases** there would be a 24hr greeting and a holiday greeting. If you are unsure of the greetings that are configured you may confirm them under the “**Auto Attendant**” portion of the Manager program



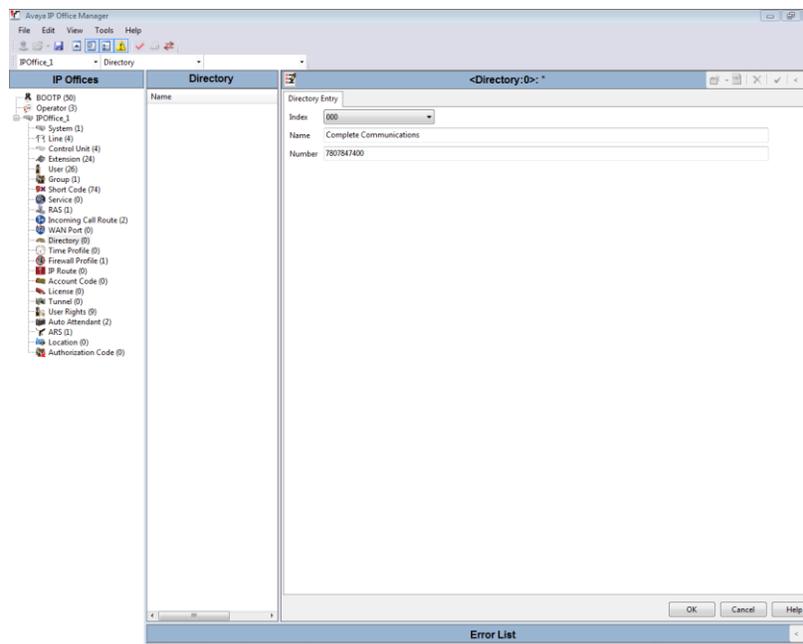
Note in the above scenario that there are two greetings configured, a 24hr and a Holiday greeting. To find out the *8XXX code, it would be in the “Greyed” out portion of the auto attendant tab. In this scenario the 24hr recording would be accessed through *8401

Adding/Deleting Company Contacts

To **Add** or **Remove** External contacts that would show up on all of the phones it would be done within the Directory portion of the Manager program. To **Add** a contact we would select the **Directory** tab within **Manager** and then Right Click in the white space or press **CTRL+N** on the keyboard

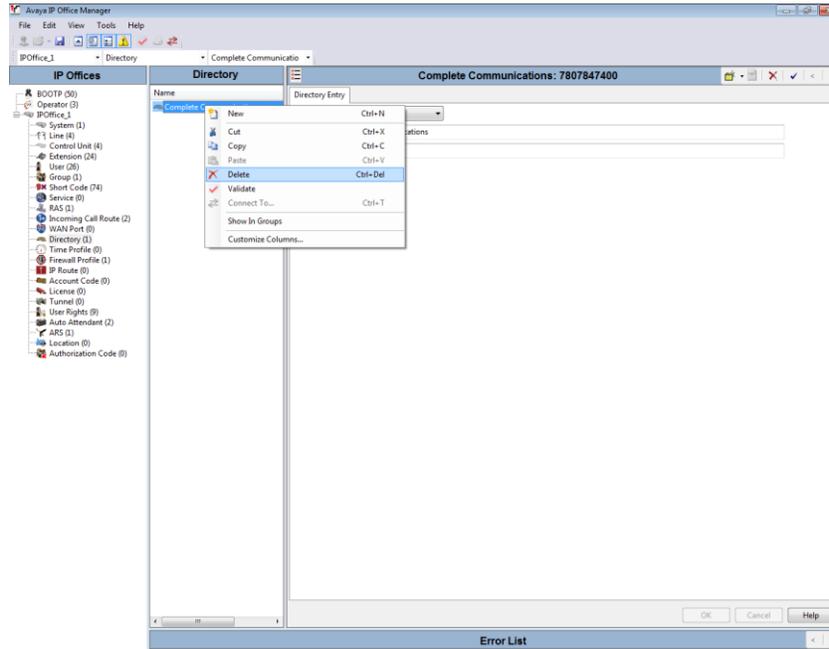


From here we would fill out the name and number for the contact. Please note: **NO DASHES, SPACES** or other characters are to be used, only the number. Example 7807847400



Once you select **OK** the entry will then be added where you would then **Merge** the entry to apply it to the Directory.

To Remove the entry you would select the appropriate entry to be removed (See Below) . Right Click and then select Delete. Once deleted you would need to Merge the configuration to have the entry permanently removed from the Directory.



Common Shortcodes

Short codes are a System and sometimes User specific Dial string that the phone system uses to reference specific features. Below are the most common ones used on the IP Office:

1. To log into any users mailbox, from any phone (you will need the users password):

Dial ***17** You will hear the IP Office message “Welcome to IP Office.....etc”- Voicemail will prompt you to enter the extension number: enter **Extension Number**

Voicemail will then prompt you to enter the password: enter **Password** for above extension number

NOTE: If you haven't set up a password, just enter the **#** key.

At this point, if you have never initialized your voicemail box, you will need to follow the prompts for initialization before you can access your voicemail box.

2. To go straight to a users voicemail box (without ringing their extension) to leave a message or to transfer someone directly to a persons voicemail box (more common);

Dial: **#** then **Extension Number** (or, if you are on a call and want to transfer the call to a users voicemail box, press **Transfer Button** then **#** followed by **Extension Number** followed by **Complete button**)

3. To access and change company greetings:

Dial: ***699**

The system will prompt you to enter your access code. Dial: **“23646”** (note: while this is usually the access code it may be different on a per customer basis. If the above number does not work, please contact the Helpdesk)

Follow the prompts to change/listen to your main company greetings.