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Optivity Telephony Manager Desktop User Guide

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Revision history

October 2003

Standard 1.00. This is a new NTP for Succession 3.0 and Optivity Telephony Manager 2.1.

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About this document

The document applies to Optivity Telephony Manager 2.1 for Succession 3.0 Software.

As a general rule, this NTP only contains information about systems, components, and features that are compatible with Succession 3.0 Software. For more information about legacy systems and software releases before Succession 3.0, click the **Technical Documentation** link under **Support** on the Nortel Networks home page:

<http://www.nortelnetworks.com/>

OTM documentation suite

The OTM Desktop Services User Guide is used in conjunction with the following manuals

- *Optivity Telephony Manager: System Administration (553-3001-330)*
Provides information on how to administer the Optivity Telephony Manager software.
- *Optivity Telephony Manager: Installation and Configuration (553-3001-230)*
Provides information on how to install and configure the Optivity Telephony Manager software.
- *Optivity Telephony Manager Telemangement Applications: System Administration (553-3001-331)*
Provides information on the following optional telemangement applications: Telecom Billing System (TBS), TBS Web Reporting, General Cost Allocation System (GCAS), Consolidated Reporting System (CRS), and Consolidated Call Cost Reports (CCCR).

Using Desktop Services

OTM Desktop Services enables you to view and modify the configuration of your telephone via a web browser.

The Web display includes a graphical view of the telephone, and shows the configured features. Help text is available for the features configured on your telephone.

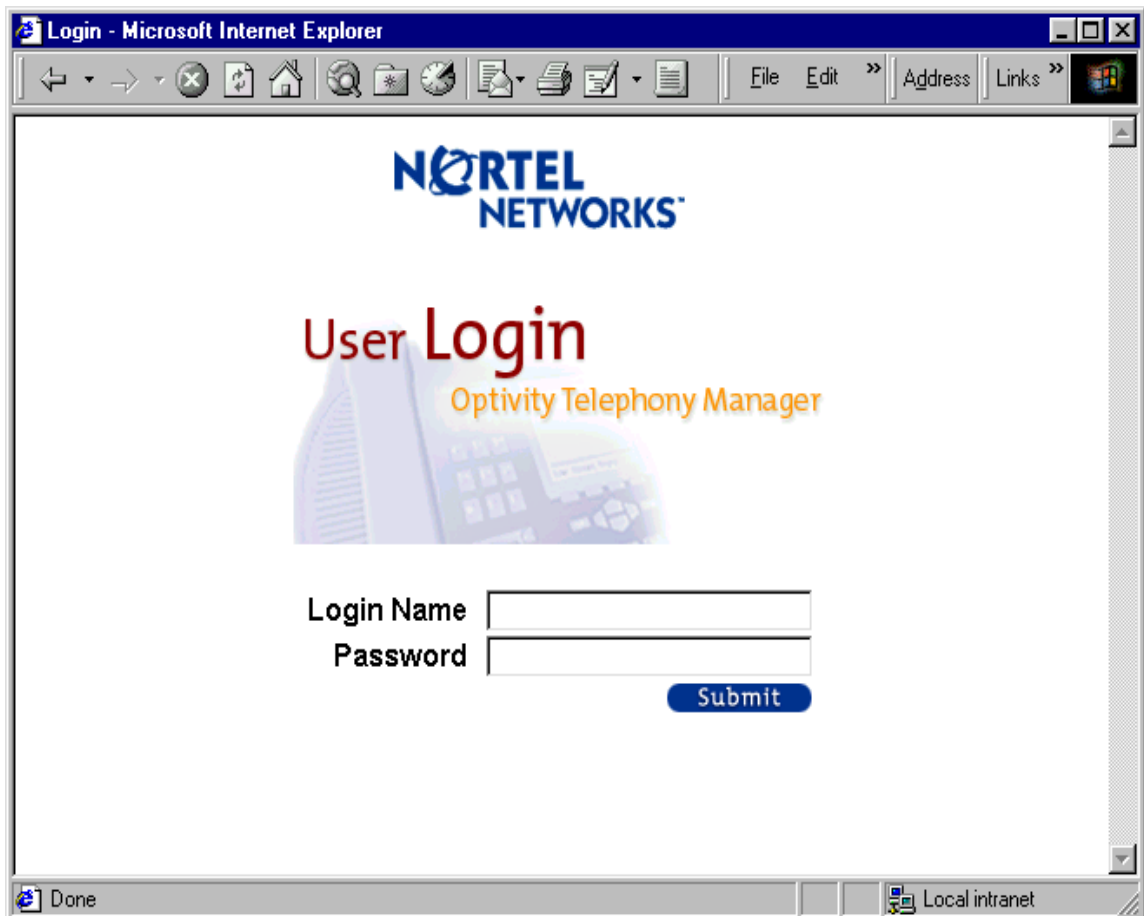
User Login page

Login security ensures protection against unauthorized entry and enforces access privileges for logged in users.

To log in to Desktop Services:

- 1** Start your web browser.
- 2** Enter the URL provided by your network administrator.

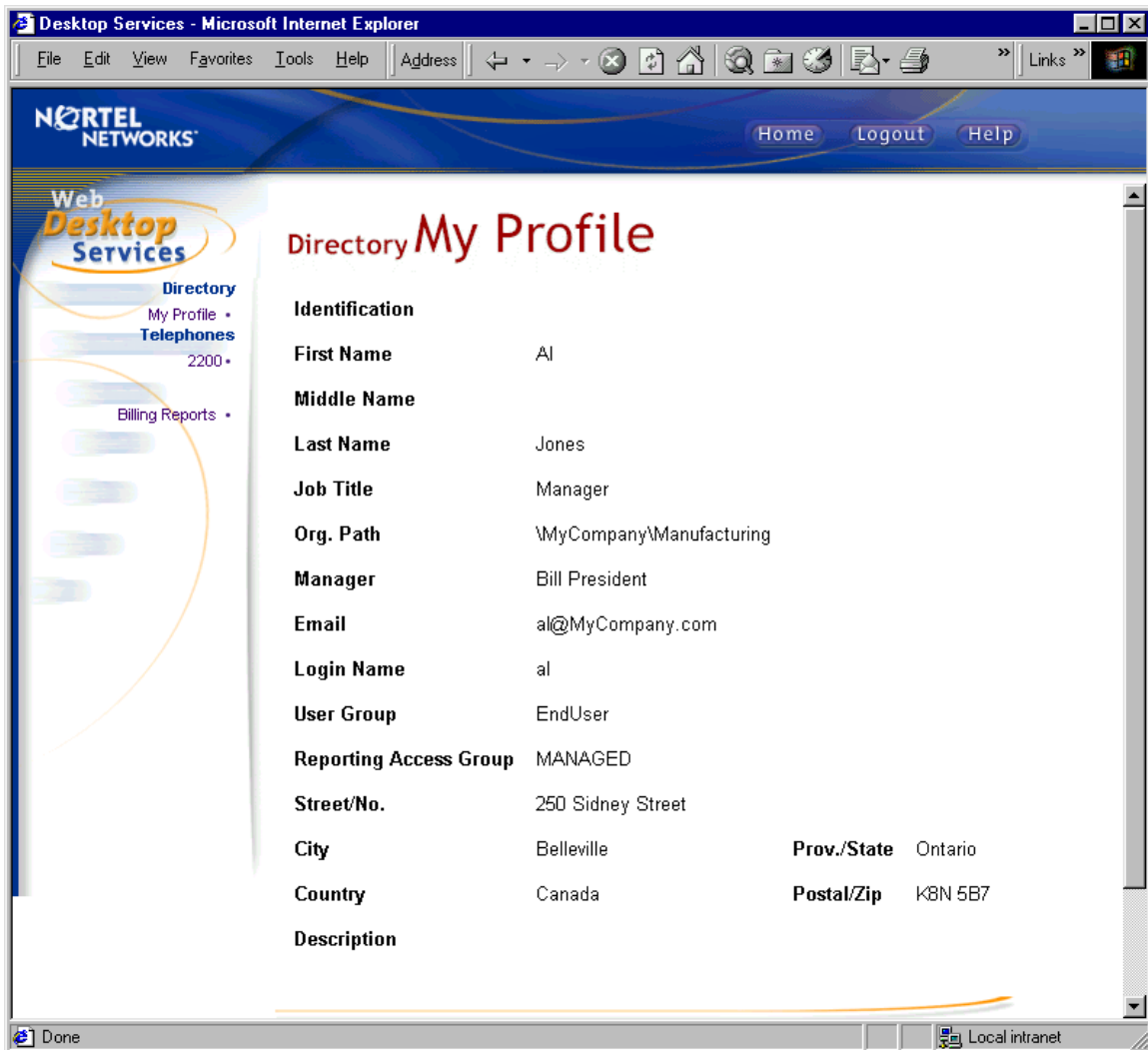
The OTM User Login page opens [\(Figure 1\)](#).

Figure 1 User Login page

- 3** Enter the user login name and password provided to you by your network administrator.

Your personal Desktop Services main page, titled "My Profile," opens.

[Figure 2](#) shows an example of the main page for Al Jones.

Figure 2 My Profile page

Desktop Services main page layout

Your Desktop Services main page includes the following common elements:

- **Information banner** (top): Contains the Nortel Networks logo, plus Help, Logout, and Home buttons. The Help button takes you to general help on how to use the web pages. The Home button takes you to your “My Profile” page. The logout button takes you to the login page.
- **Navigation bar** (left side): Lists hypertext links to various Desktop Service pages. When you click an item in the Navigation bar, the related page appears in the Content Frame of your web browser.



Note: In situations where you have telephones on different systems managed by the OTM Server, the Navigation Tree expands to include the systems as the main nodes. You then select the My Profile or Telephone(s) in the desired system.

- **Content frame:** Contains the page based on your selection in the Navigation bar. There are three types of pages:
 - **My Profile page:** Contains general information about you (name, department, address, and so forth). The information displayed is determined by your network administrator.
 - **Telephone pages:** Contains telephone configuration data. You may have more than one telephone. The information displayed is determined by your network administrator.
 - **Other Links:** Contains additional links that may be provided by your network administrator.

A line is placed at the bottom of each content page to visually indicate the end of the page. If vertical or horizontal scrolling is required, the entire page is scrolled.

My Profile page

Once you log in, the main page, My Profile, opens. This page contains general information about you. The system retrieves this information from the OTM Directory.

➔ Click the Home button in the banner, or My Profile in the navigation bar to return to this page.

The information that appears is fixed and cannot be changed. If there is no information for a field, it is left blank.

The following information is presented on the My Profile page:

- Employee first, middle, and last name
- Identification (employee ID)
- Job Title
- Org Path (this is extracted from the Organization Path in the OTM directory)
- Manager
- E-mail address
- Login Name
- User Group
- Web Reporting Role
- Address fields
- Description

Telephone pages

Once you have logged in, you are presented with a list of telephones in the Navigation Bar. The telephones are identified by prime directory number (DN). To get this list, the Web Server scans all the employee databases, one per system, on the server.

If you have telephones on different systems, served by different OTM servers, then you must log in to the different servers to access these telephones. Your network administrator provides you with a URL, user login name, and password for each of these OTM servers.

To open the Telephone pages:

- ➔ Click a Telephone DN in the navigation bar.

The Telephone pages open in the content frame with the General page displayed (Figure 3).

Figure 3 Telephone—General page

The screenshot shows a web browser window titled "Desktop Services - Microsoft Internet Explorer". The address bar is empty. The page header features the "NORTEL NETWORKS" logo on the left and "Home", "Logout", and "Help" links on the right. A left sidebar contains a "Web Desktop Services" logo and a "Directory" section with links for "My Profile", "Telephones", "7003", and "Billing Reports". The main content area is titled "Telephone" and shows "Ext. 7003" with a "Current Configuration" link and a "Validate" button. Below this is a "Troubleshoot Problems" link. A tabbed interface shows "General", "Keys", "Features", and "Details" tabs, with "General" selected. The "General Phone Properties" section contains the following fields:

Station Location	<input type="text" value="004-0-01-04"/>
System	Sample Site - Sample Meridian 1
Phone Type	M3904
Terminal Number	004 0 01 04
Display Based Modules	<input type="text" value="0"/>
Key Based Modules	<input type="text" value="1"/>
Designation	<input type="text" value="004001"/>

At the bottom of the form are "Submit" and "Help" buttons. The browser's status bar at the bottom indicates "Local intranet".

The Telephone pages have a small graphic in the top left corner. This graphic is detailed enough for you to recognize the type of telephone. The prime DN, or extension number, of the telephone also appears at the top of the page.

The Troubleshoot Problems link provides access to the troubleshooting page.

You have up to four Telephone pages, accessed by links below the small telephone graphic. The capabilities provided by these web pages depends on your telephone type.

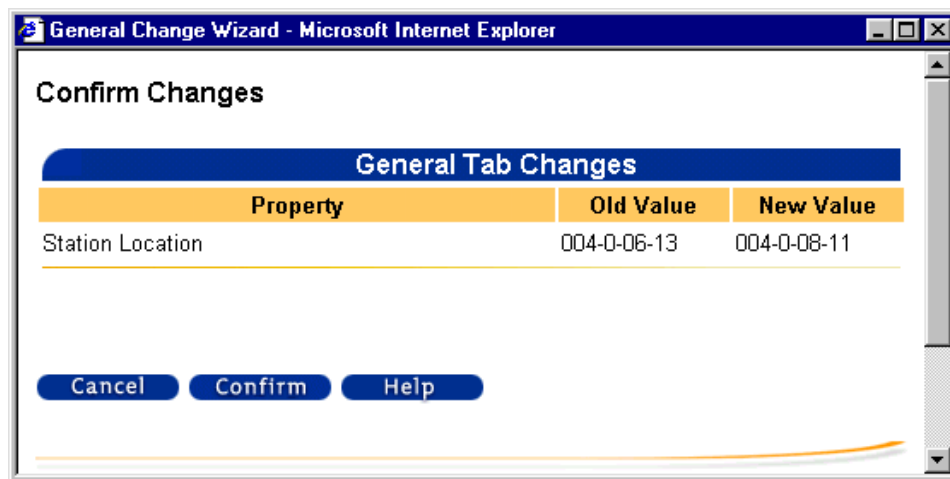
Telephone—General page

The General Page provides general information about the telephone. The following information appears on the General page:

- **Station Location:** A text field similar in purpose to the System field. You may want to use this to provide more user-friendly names.
- **System:** Identifies the site, system, and customer number, if applicable, where the phone is connected. This information is retrieved from OTM common services and displayed in the format “Site - System - Customer x.”
- **Phone type** (M2616, M3904, and so on)
- **Terminal Number** (TN): Address of the telephone
- **Key Based Modules** (for applicable telephone types)
- **Designation:** A unique 1–6 character telephone identifier. This data is stored in station data and the overlays. This field is often used to identify the location of the phone within the building (for example, cable pair), and is the response to the prompt DES in LD 10 and LD 11.

If allowed by the network administrator, you may change the following fields:

- Station Location
 - Key Based Modules
 - Designation
- 1 If you change one or more of these fields and click Submit, the Confirm Changes dialog box opens (Figure 4).

Figure 4 Confirm changes to General Tab

- 2 Verify the information and click Confirm. If there are no errors, a change confirmation page opens. See [“Change confirmation pages” on page 49](#) for more information.

The Troubleshoot Problems link provides access to the troubleshooting page.

Current configuration/Pending changes

When the information for your telephone has been changed, but the changes have not been synchronized with the system, a Show Current configuration/Pending changes drop-down box enables you to select which configuration is shown.

When there are pending changes, and you have been assigned the “User can sync changes” option in your access profile, the drop-down box is presented along with Schedule and Restore buttons. If your access profile allows you to make changes to the General, Keys, or Features pages, the Validate button is also presented ([Figure 5](#)).

Figure 5 Configuration indication with synchronization allowed

Validate button

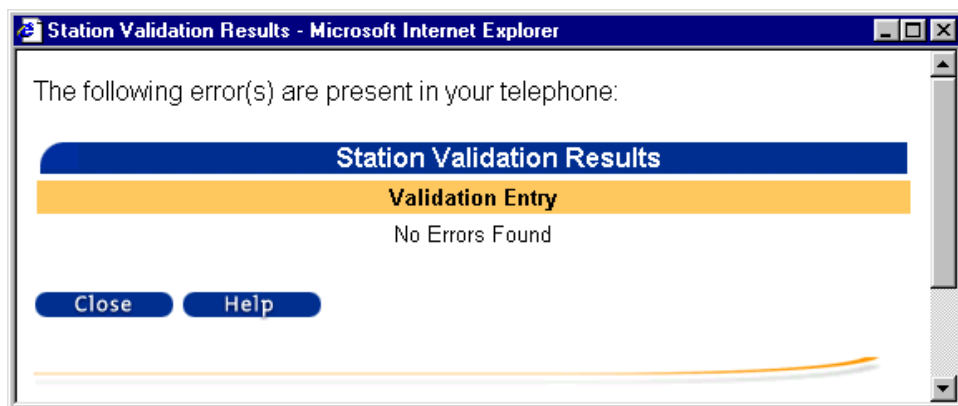
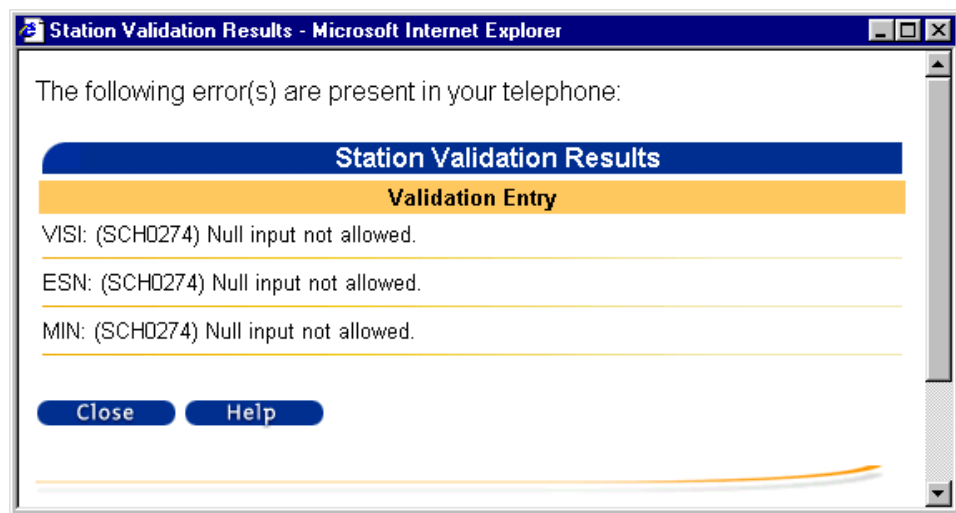
The validation process determines whether there are any errors that can cause problems during synchronization with the system.

➔ Click Validate to validate the changes that have been made to the configuration.

- If there are no errors, the page shown in (Figure 6) opens.
- If there are errors, the Station Validation Results indicate the errors that are present in your telephone configuration (Figure 7).



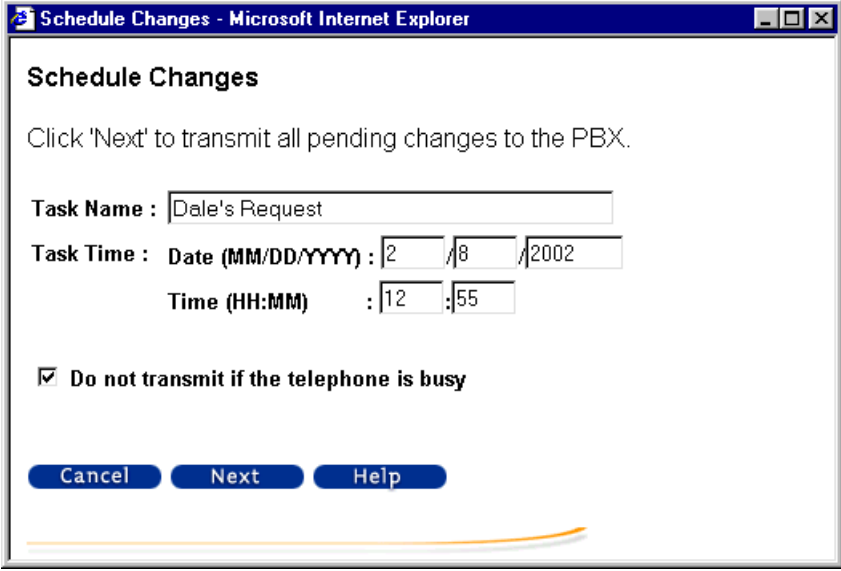
Note: The Validate button is not available when you are viewing the current configuration of your telephone. When your telephone has been marked for deletion in the OTM database, the Telephone pages show the deleted configuration. The Validate button is not available when you are viewing the deleted configuration.

Figure 6 Station Validation Results with no errors**Figure 7** Station Validation Results with errors

Schedule button

➔ Click Schedule to schedule synchronization with the PBX system.

The Schedule Changes dialog box opens (Figure 8).

Figure 8 Schedule Changes dialog box

Schedule Changes

Click 'Next' to transmit all pending changes to the PBX.

Task Name : Dale's Request

Task Time : Date (MM/DD/YYYY) : 2 / 8 / 2002

Time (HH:MM) : 12 : 55

☒ Do not transmit if the telephone is busy

Cancel Next Help

To schedule a sync task:

- 1 Enter a Task Name in the Task Name text box.
The maximum length of the Task Name is 128 characters.
- 2 Use the Task Time text boxes to set the start time for the task.



Note: If the Task Time passes before you click Next, the task is accepted and runs immediately after you click Next.

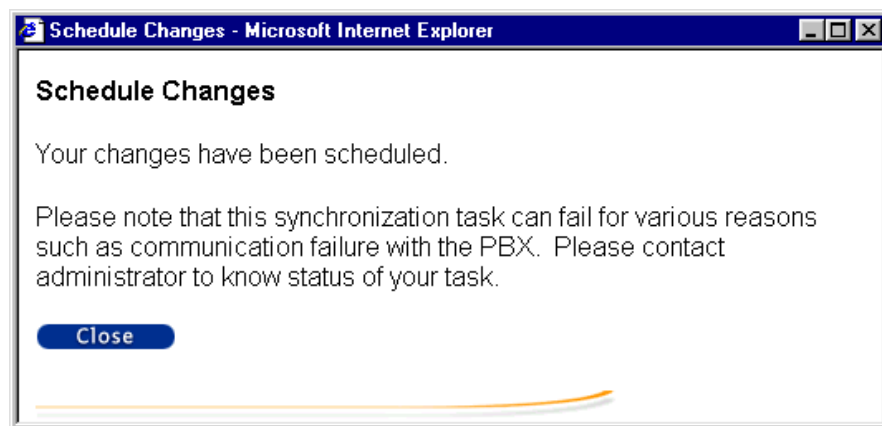
- 3 Click the “Do not transmit if the telephone is busy” check box to have the sync task check the status of the telephone before making changes to the telephone configuration.



Note: If the telephone is busy, the changes are not made and the event is logged in the appropriate transmit log. The transmit is not automatically rescheduled. It is up to you to reschedule the transmit.

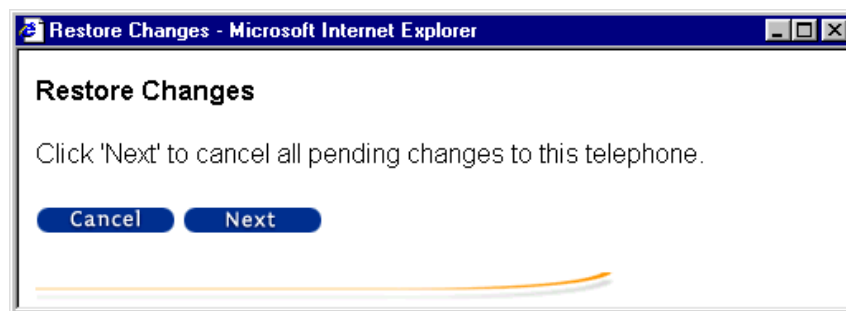
- 4 Click Next.

The Schedule Changes confirmation dialog box opens (Figure 9).

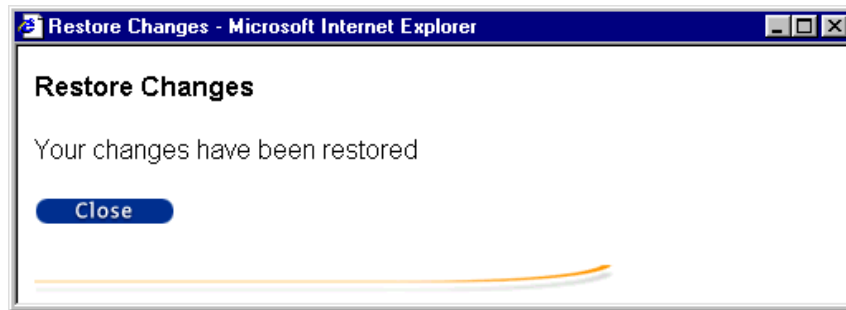
Figure 9 Schedule Changes confirmation

Restore button

➔ Click Restore. The Restore Changes dialog box opens (Figure 10).

Figure 10 Restore Changes dialog box

If you click Cancel, the dialog box closes. If you click Next, the Restore Changes confirmation dialog box opens (Figure 11).

Figure 11 Restore Changes confirmation

When there are pending changes, and you do not have the “User can sync changes” option, the drop-down box along with the Validate and Restore buttons appear (Figure 12). You are not allowed to schedule synchronization. Your network administrator reviews your changes and schedules synchronization for you.

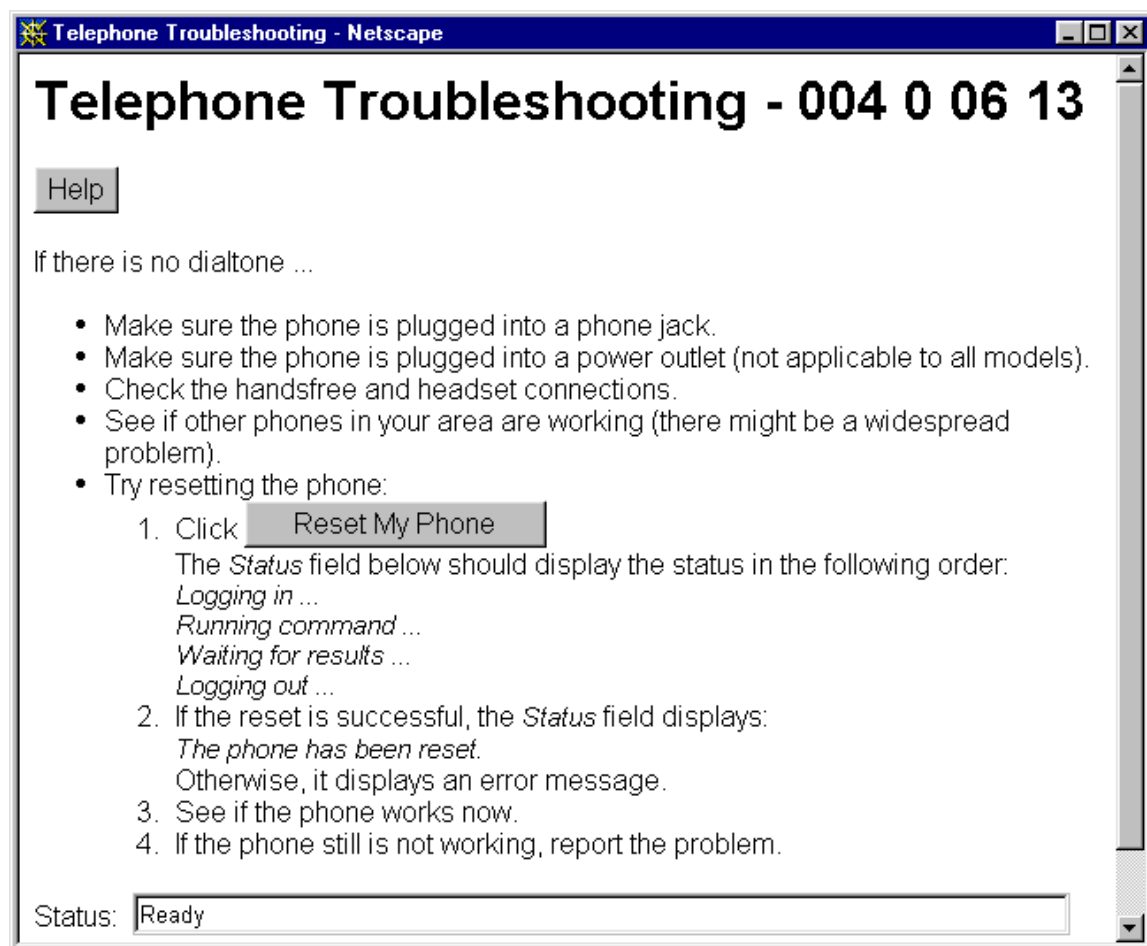
Figure 12 Configuration indication with option “User can sync changes” not selected

When the telephone and the system are synchronized, “Current Configuration” appears at the top of the page, and the drop-down box no longer appears (Figure 13).

Figure 13 Configuration indication when there are no pending changes

Telephone Troubleshooting page

You can access the Telephone Troubleshooting page from the Telephone pages via the “Troubleshoot Problems” link. The Telephone Troubleshooting page is shown in (Figure 14). The Reset My Phone button performs an enable and status command on this telephone via a Maintenance Windows API.

Figure 14 Telephone Troubleshooting page

Telephone—Keys page

The Telephone Keys page displays a graphical layout of the function keys assigned to the telephone. The layout varies for different telephone types.

All current feature key assignments are always visible. The key labels on the graphic match the labels in Station Administration. For M3900 series telephones these labels match the soft labels on the set, and the text is shortened to seven characters. When the page first appears, key 0 is selected.

➔ Select other keys by clicking on a key.

(Figure 15) shows an example of the Telephone Keys page for an M3904 telephone.

M3903 and M3904 telephones have two layers of feature keys.

- ➔ Use the Shift key on the telephone graphic to toggle between the first and second layer.
- ➔ If you have either a key-based expansion module or a display-based expansion module installed on your telephone, click the Next link located below the graphic representing the second layer of feature keys to access the keys for the expansion module
- ➔ You may have up to two key-based expansion modules. Use the Next link below the graphic representing the first expansion module to access the keys for the second module.

The display-based expansion module has three layers of eight keys that are accessed by pressing the page key on the module. In OTM, the three layers of keys are represented by three separate pages.

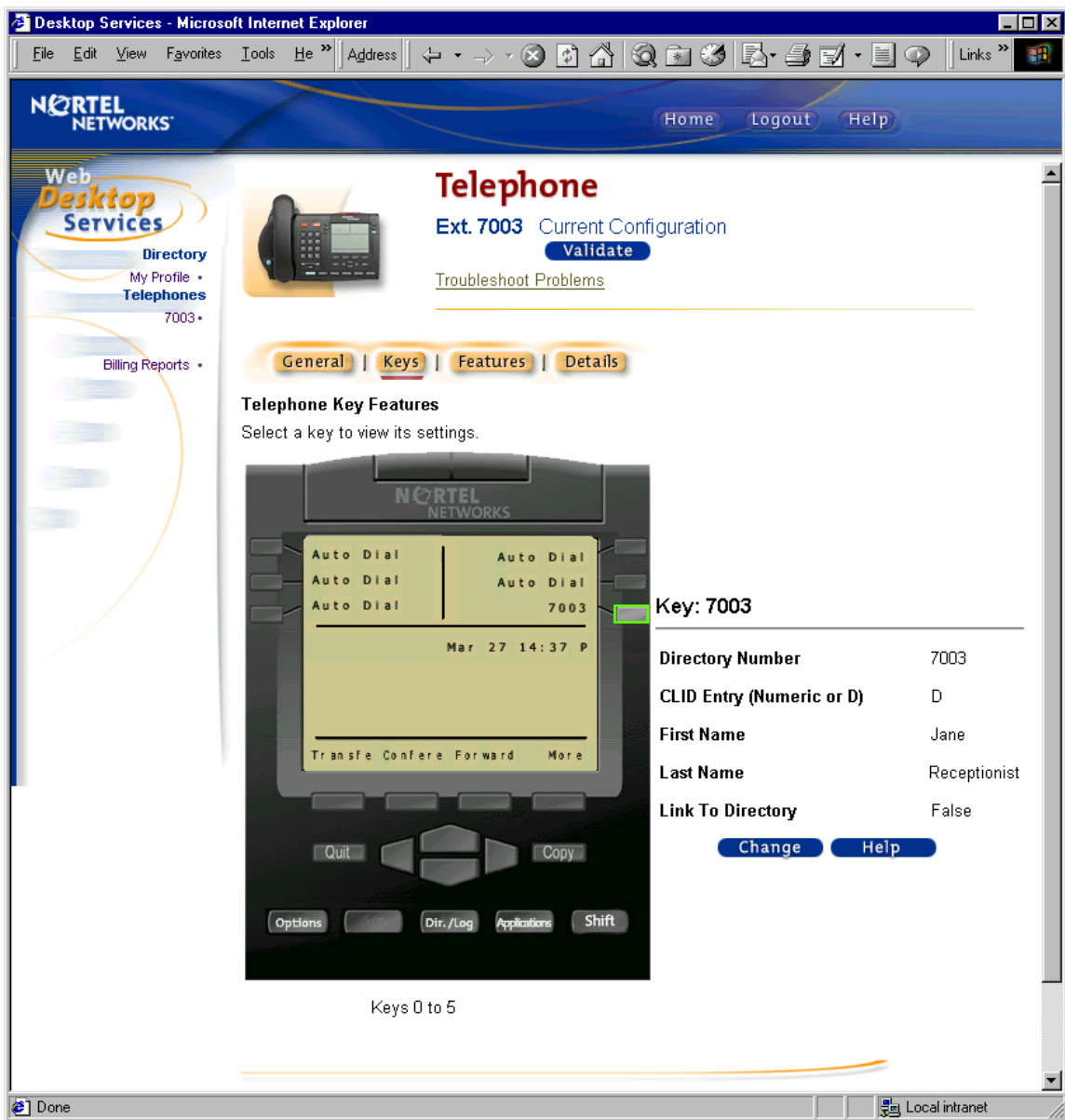
- ➔ Use the Next and Previous links below the graphic representing the expansion module (Figure 17) to move between the layers.

When a key is selected, the following occurs:

- The key is highlighted. The method used to highlight depends on the phone type.
- The name of the key and its configurable parameters, if any, appear beside the telephone graphic.

A Help button takes you to Help on how to use the selected key.

Figure 15 Telephone Keys page—first layer

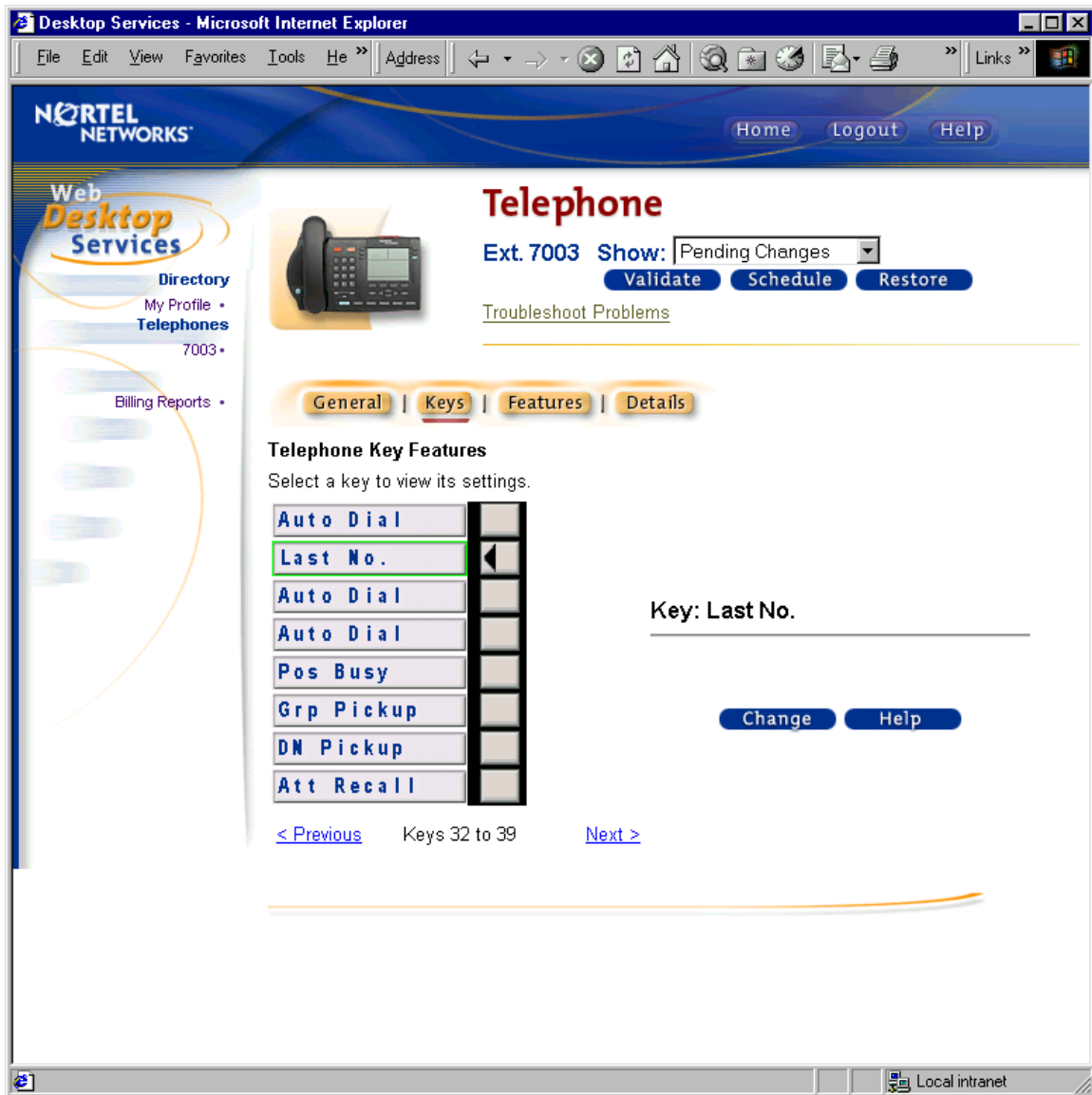


If the telephone has one or two key-based modules, or a display-based module, a graphic indicates which set of keys appears. Next and Previous links enable you to “scroll” the graphic from one set of keys to another.

[Figure 16](#) shows the user interface for the keys on an M3904 telephone equipped with a display-based expansion module.

Figure 16 Telephone Keys page—second layer with an expansion module link

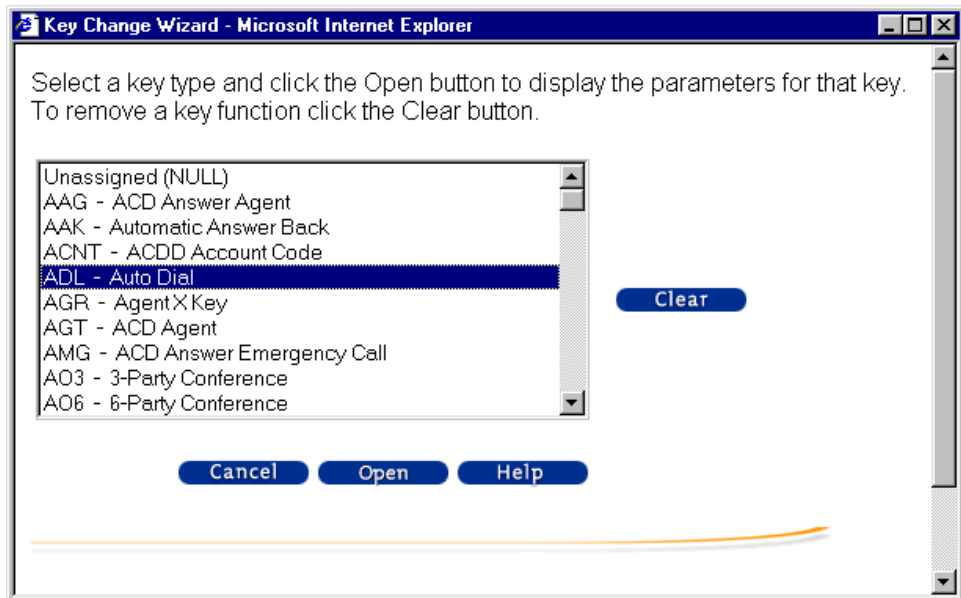
➔ Click the Next link to view the features assigned to the first layer of keys on the module (Figure 17).

Figure 17 Display-based expansion module keys—first layer

Changing a key

If permitted by your access profile, when you click Change after selecting a key, a new browser window opens with the appropriate controls for changing the key you selected. In this browser window, a list of the possible key choices appears (Figure 18). This list is dynamic and is based on both the telephone type and the key selected. For example, key 17 on an M2317 telephone must be a transfer key.

Figure 18 Select Auto Dial key type



The Help button is context sensitive and accesses the information in the Input/Output guide on configuring a key for the selected feature or service.

The key's parameters, if any, appear on subsequent pages of the wizard.



Note: The Clear button removes the key function and takes you to the next page in the key change wizard. As shown in (Figure 18), if the telephone key that you have selected is currently unassigned (null), the Clear button does not appear.

Changing the parameters of an Auto Dial key

Use the following procedure to change the telephone number assigned to an Auto Dial key:

- 1 Click a key in the graphic on the Telephone Keys page.
- 2 Click Change. The Key Change Wizard launches.
- 3 Click “ADL — Auto Dial” in the list of key types (Figure 19).
- 4 Click Open.
- 5 Type the new maximum number of digits and the new Autodial DN in the edit boxes (Figure 19).



Note: If you change the number of Auto Dial digits to a value that is greater than the default number in the system, or if you enter an Auto Dial number that has more digits than the default value, you receive a validation error.



Note: You use the Find DN button to look up directory numbers. It appears whenever there is a DN edit box. For information on using the Find DN button, see [“Finding directory numbers” on page 41](#).

Figure 19 Autodial key change wizard

Key Tab Changes	
Key Feature Parameter	Value
Number of Autodial Digits :	12
Autodial DN :	94085551212

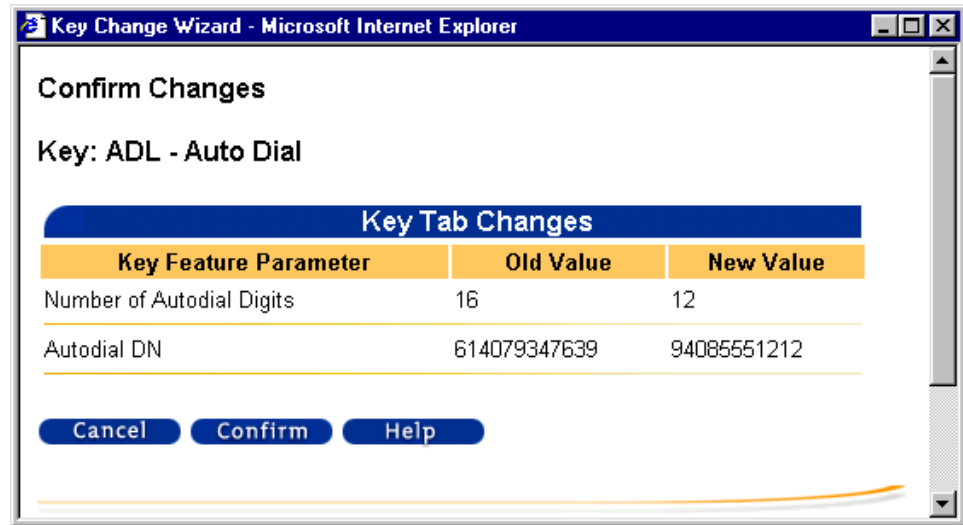
Find DN

Cancel Previous Submit Help

- 6 Click Submit.

The key change summary page opens ([Figure 20](#)).

Figure 20 ADL key change summary



- 7 Click Confirm.

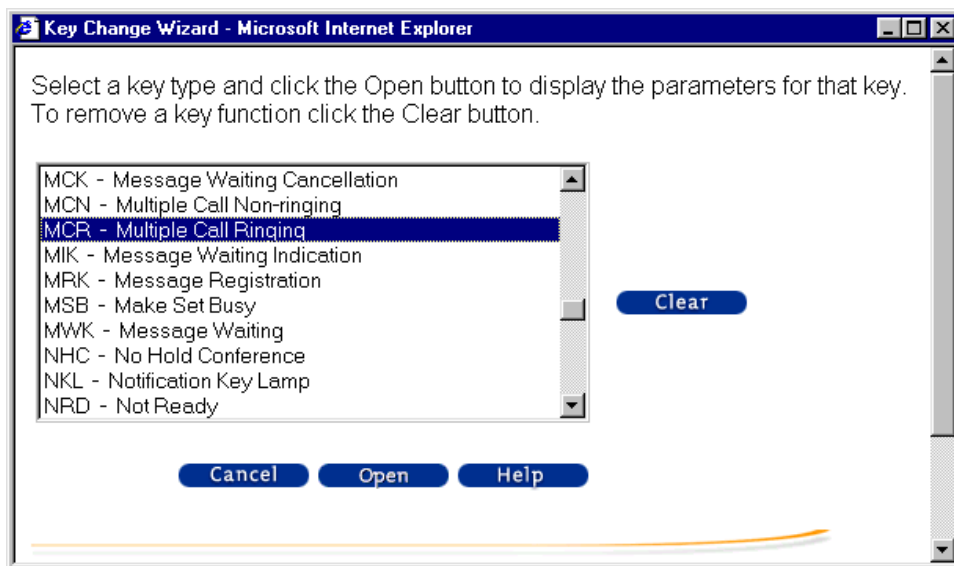
A confirmation page appears. See [“Change confirmation pages” on page 49](#).

Changing the parameters of an MCR DN key

Use the following procedure to change the first name and last name parameters associated with an MCR DN key:

- 1 Click an MCR DN key in the graphic on the Telephone Keys page ([Figure 15](#)).
- 2 Click Change.

The Key Change Wizard launches. The current key type, MCR - Multiple Call Ringing, is highlighted ([Figure 21](#)).

Figure 21 Select Multiple Call Ringing key type

- 3 Since you are not changing the key type, simply click Open.

The key change wizard displays the current parameters for the selected key (Figure 22).



Note: You can only modify the DN, CPND, and CLID. You may not view or change the DN's voice mailbox, ANI, or MARP.



Note: When the Name Display Link to Directory check box is checked in Station Administration, the values for the First Name and Last Name fields are obtained from the directory and are not editable.



Note: If the key change wizard does not display a directory number, or if you want to change the directory number, see [“Finding directory numbers” on page 41](#).

Figure 22 Current parameters for Multiple Call Ringing DN key

Key: MCR - Multiple Call Ringing

Key Tab Changes	
Key Feature Parameter	Value
Directory Number :	7544
CLID Entry (Numeric or D) :	0
First Name :	Dale
Last Name :	Coldiron
Link To Directory* :	<input type="checkbox"/>

*When 'Link To Directory' is checked, changes to First/Last Name are ignored.

Cancel Previous Submit Help

4 Change the first name and last name (Figure 23).

Figure 23 Changed parameters for Multiple Call Ringing DN key

Key: MCR - Multiple Call Ringing

Key Tab Changes	
Key Feature Parameter	Value
Directory Number :	7544
CLID Entry (Numeric or D) :	0
First Name :	JOHN
Last Name :	BRACKIN
Link To Directory* :	<input type="checkbox"/>

*When 'Link To Directory' is checked, changes to First/Last Name are ignored.

Cancel Previous Submit Help

- 5 Click Submit.

A summary page opens that displays your changes (Figure 24).

Figure 24 MCR key change summary page

Key Tab Changes		
Key Feature Parameter	Old Value	New Value
Directory Number	7544	7544
CLID Entry (Numeric or D)	0	0
First Name	DALE	JOHN
Last Name	COLDIRON	BRACKIN
Link To Directory	False	False

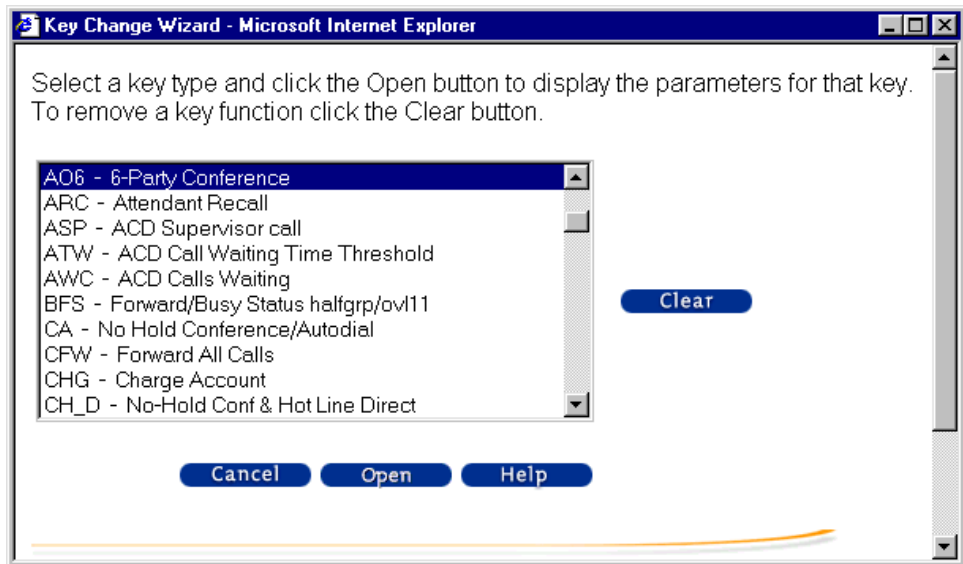
Cancel Confirm Help

- 6 Click Confirm. A confirmation page appears. See “Change confirmation pages” on page 49.

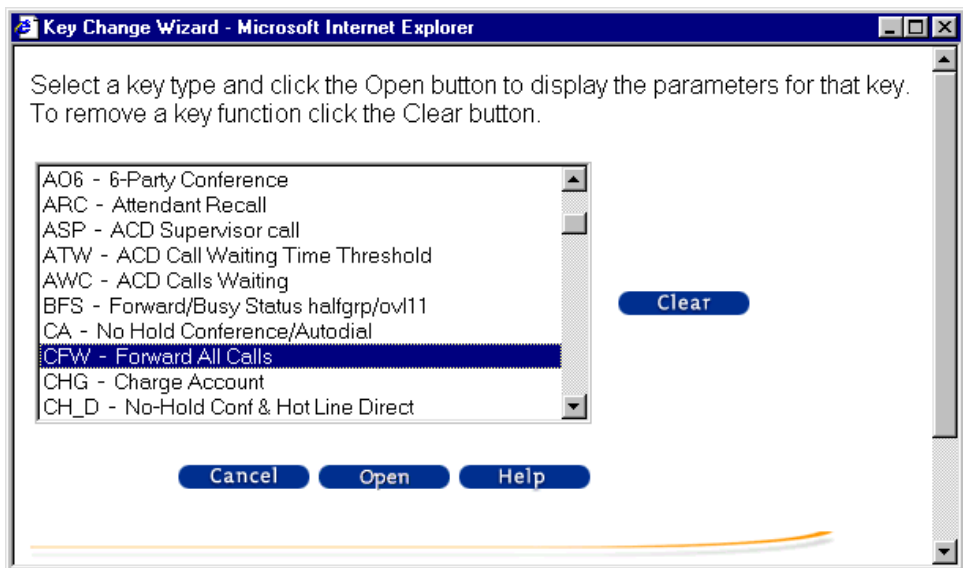
Changing a key type

In the following procedure, you change a Conference key to a Call Forward key.

- 1 Click the Conference key in the graphic on the Telephone Keys page (Figure 16 on page 29).
- 2 Click Change.
The Key Change Wizard launches. The current key type is highlighted. (Figure 25).

Figure 25 Key Change Wizard displaying the current key type

- 3 Click CFW - Forward All Calls in the list of key types (Figure 26).

Figure 26 Select the Forward All Calls key type

- 4 Click Open.

- 5 Enter the redirection DN length and redirection DN in the edit boxes (Figure 27).



Note: When changing a key type, the default values do not appear. If you enter a redirection DN length that is greater than the default value in the system, or if you enter a redirection DN that has more digits than the default value, you receive a validation error.

Figure 27 Forward All Calls Key Change Wizard

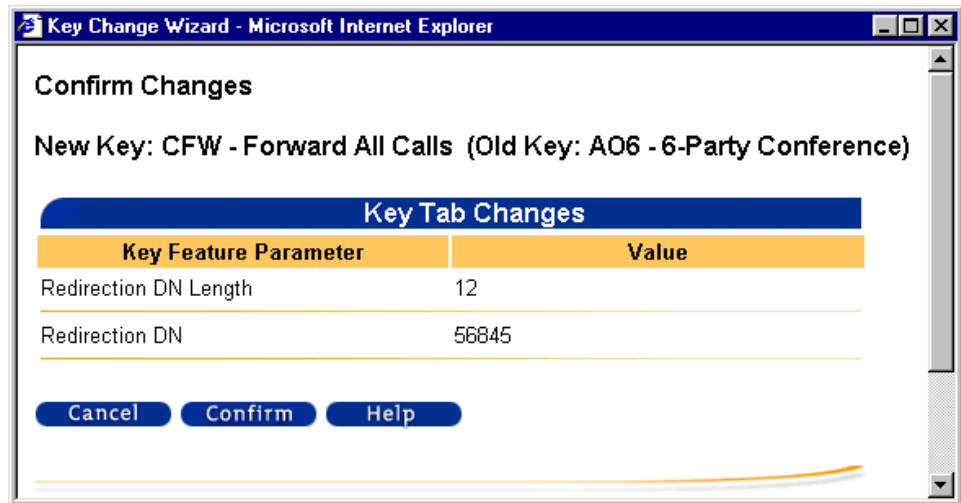
Key Tab Changes	
Key Feature Parameter	Value
Redirection DN Length :	12
Redirection DN :	56845

Find DN

Cancel Previous Submit Help

- 6 Click Submit.

The key change summary page opens (Figure 28).

Figure 28 CFW Key change summary page

- 7 Click Confirm.

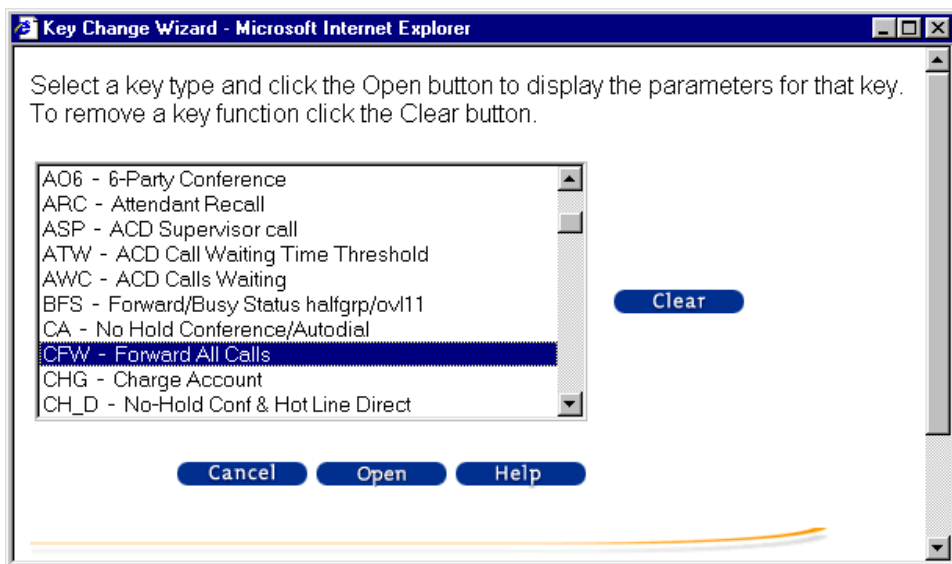
A confirmation page appears. See [“Change confirmation pages” on page 49](#).

Removing a key

Use the following procedure to remove the function associated with a key, creating a blank, or unassigned, key:

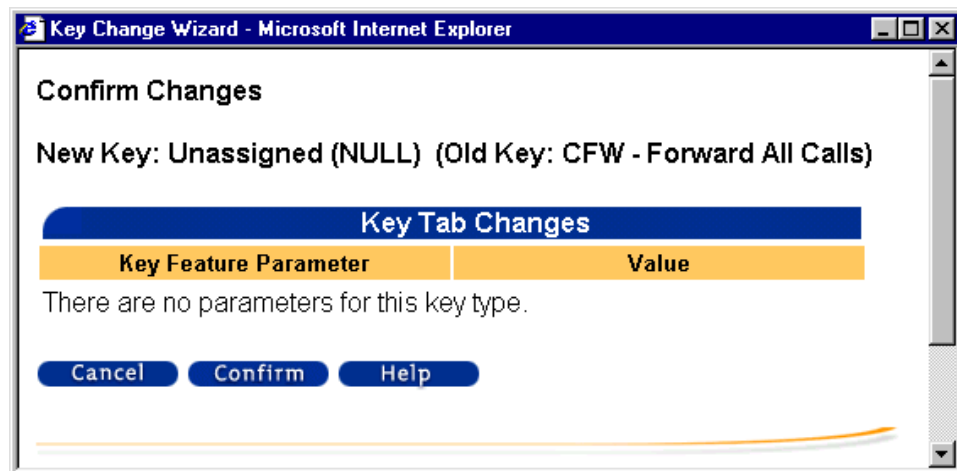
- 1 Click a key in the graphic on the Telephone Keys page ([Figure 15 on page 27](#)).
- 2 Click Change.

The Key Change Wizard launches. The function associated with the selected key is highlighted in the list (Forward All Calls in this example) ([Figure 29](#)).

Figure 29 Current key function displayed in the Key Change Wizard

- 3 Click Clear.

The key change summary page displays [\(Figure 30\)](#).

Figure 30 Unassigned Key Change summary page

- 4 Click Confirm.

A confirmation page appears. See [“Change confirmation pages” on page 49](#).

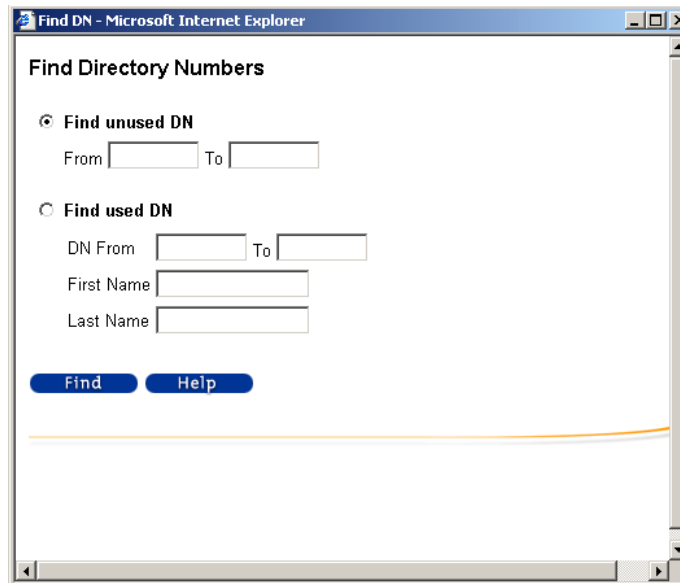
Finding directory numbers

You use the Find DN button to look up used or unused directory numbers. It appears next to the edit box for any DN key.

Find unused directory numbers

- 1 Click Find DN (Figure 27 on page 38). The Find Directory Numbers page opens (Figure 31).

Figure 31 Find Directory Numbers page



The screenshot shows a web browser window titled "Find DN - Microsoft Internet Explorer". The page content is titled "Find Directory Numbers". It features two radio buttons: "Find unused DN" (which is selected) and "Find used DN". Below the "Find unused DN" option are two text input fields labeled "From" and "To". Below the "Find used DN" option are three text input fields labeled "DN From", "First Name", and "Last Name". At the bottom of the form area are two blue buttons: "Find" and "Help". A horizontal orange line is visible below the buttons. The browser window has standard Windows XP-style window controls (minimize, maximize, close) in the top right corner.

- 2 Click the Find Unused DN radio button.

- 3 Enter a range of DNs on which to search.



Note: You must have a numbering plan defined in the System Properties in OTM Windows Navigator to use the Find Unused DNs feature.

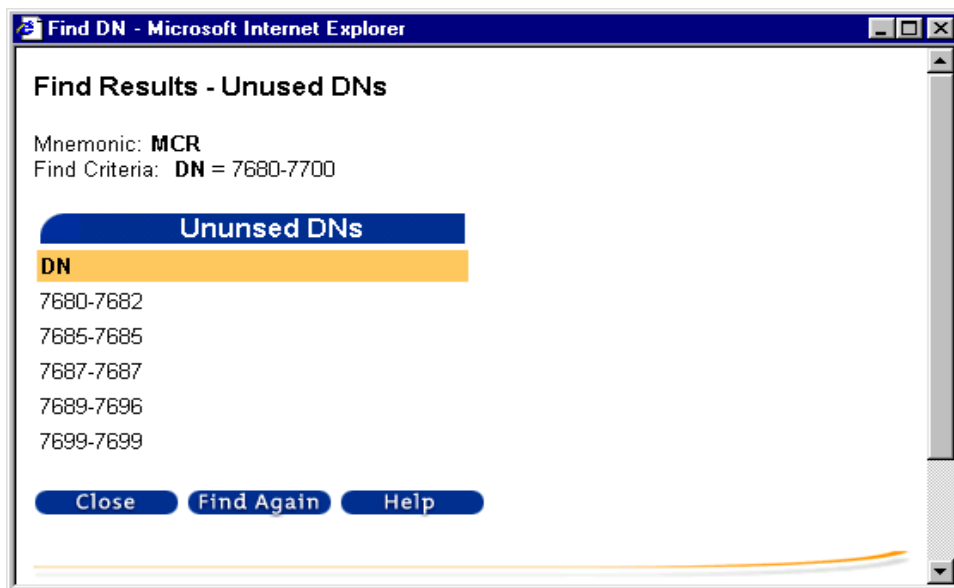
Error Messages

If the numbering plan is not defined in System Properties, an error message appears: “Numbering Plan is empty or not defined for this customer, or does not contain the appropriate DN type”.

If there are no unused DNs, an error message appears: “All DNs are in use”.

- 4 Click Find. If unused DNs are found, a page similar to the example shown in [Figure 32](#) appears.

Figure 32 Find results when Unused DNs exist



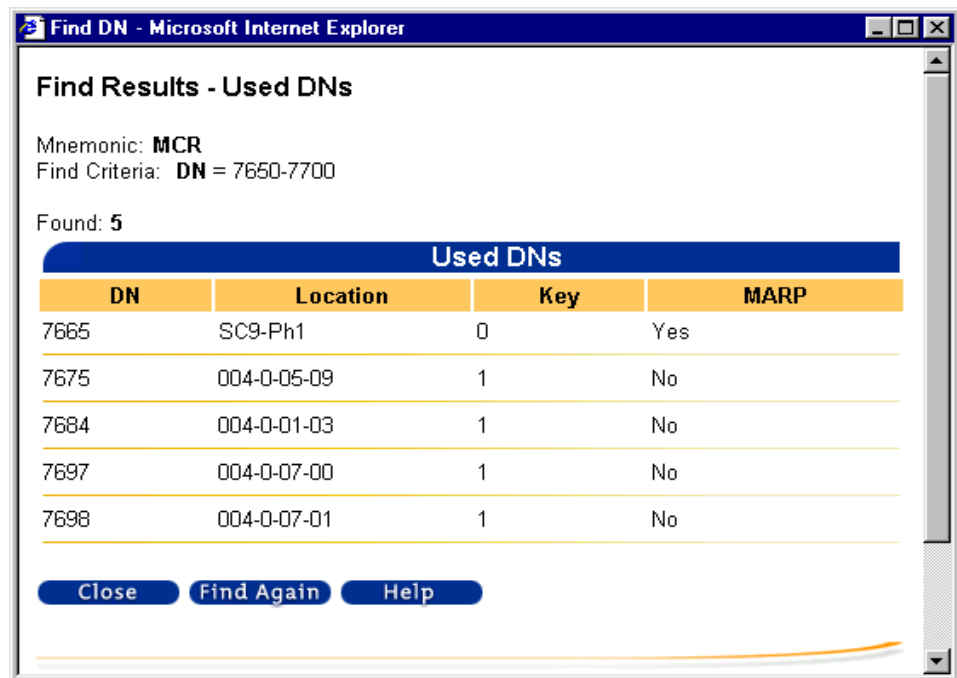
Note: Only the unused DNs belonging to the same site, system, and customer as your telephone are shown.



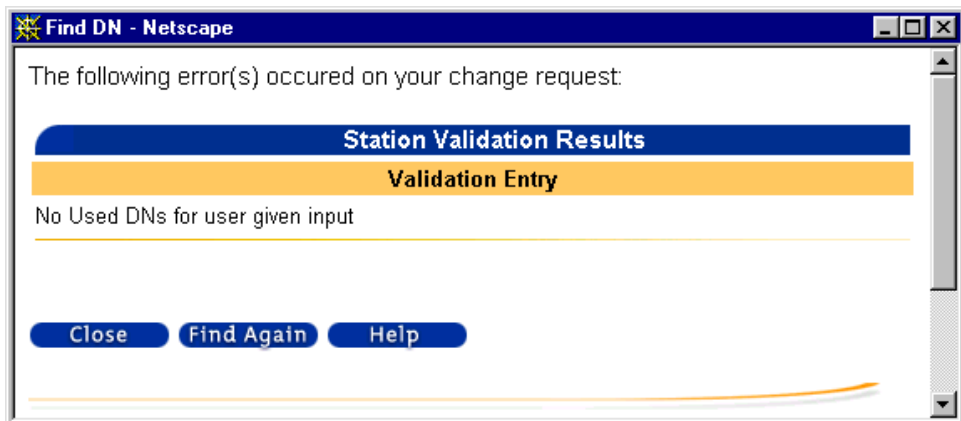
Note: If you click Find Again, you return to the previous page, and you can enter a different range of DNs.

Find used directory numbers

- 1 Click Find DN ([Figure 27 on page 38](#)). The Find Directory Numbers page opens ([Figure 31](#)).
- 2 Click the Find Used DN radio button.
- 3 Click the radio button that corresponds to your search criteria:
 - To search by DN, enter a range of DNs on which to search.
 - To search by last name, enter the last name of the person whose name is assigned to the DN you are seeking.
 - To search by first name, enter the first name of the person whose name is assigned to the DN you are seeking.
- 4 Click Find. If DNs that match your search criteria are found, a page similar to the example shown in [Figure 33](#) opens. If there are no DNs that match your search criteria, a message similar to the one shown in [Figure 34](#) opens.

Figure 33 Find results when there are matching used DNs

Used DNs			
DN	Location	Key	MARP
7665	SC9-Ph1	0	Yes
7675	004-0-05-09	1	No
7684	004-0-01-03	1	No
7697	004-0-07-00	1	No
7698	004-0-07-01	1	No

Figure 34 Find results when there are no matching used DNs

Station Validation Results	
Validation Entry	
No Used DNs for user given input	

Telephone—Features page

The Telephone Features page allows you to view and change features that are not assigned to keys. Features are related to individual prompts in LD 10 or 11, with one or more configurable parameters.

Your network administrator determines which features you can see in the list. If your access profile allows changes, the Submit and Reset buttons appear [\(Figure 35\)](#).

Whenever possible, a drop-down list box containing all possible values for the feature is provided. In cases where this is not possible (for example, when entering a call forward DN), an edit box is provided.

Figure 35 Telephone Features page

Desktop Services - Microsoft Internet Explorer

File Edit View Favorites Tools Help Address Links

NORTEL NETWORKS Home Logout Help

Web Desktop Services

Directory
My Profile •
Telephones
7003 •
Billing Reports •

Telephone
Ext. 7003 Current Configuration
[Validate](#)
[Troubleshoot Problems](#)

General | Keys | **Features** | Details

Telephone Features
Change one or more features and click 'Submit'.

1 - 24 of 24
[1]

[Submit](#) [Reset](#)

Features		
Feature	Description	Value
AEFD	Alternate External Flexible Call Forward	Find DN <input type="text"/> Help
AEHT	Alternate External Hunt DN	Find DN <input type="text"/> Help
AFD	Alternate Flexible Call Forward DN	Find DN <input type="text"/> Help
AHA	Automatic Hold	<input type="text" value="Denied"/> Help
AHNT	Alternate Hunt DN	Find DN <input type="text"/> Help
ARHA	Audible Reminder of Held Call	<input type="text" value="Denied"/> Help
ARTO	Alternate Redirection Time Option	<input type="text" value="0"/> Help

Local intranet

Telephone—Details page

The Telephone Details page provides a summary of the complete telephone configuration. It consists of two sections, one for the keys (Figure 36), and one for the features (Figure 37).

Figure 36 Telephone Details layout (keys)

The screenshot shows a web browser window titled "Desktop Services - Microsoft Internet Explorer". The page header includes the Nortel Networks logo and navigation links: Home, Logout, and Help. A left sidebar contains links for Directory, My Profile, Telephones (selected), 7003, and Billing Reports. The main content area is titled "Telephone" and shows "Ext. 7003" with a "Current Configuration" link and a "Validate" button. Below this is a "Troubleshoot Problems" link. A tabbed interface shows "General", "Keys", "Features", and "Details" (selected). The "Telephone Details" section displays the following information:

Keys and Features for:
DN: 7003, **Station Location:** 004-0-01-04
System: Sample Site - Sample Meridian 1, **Phone Type:** M3904
Terminal Number: 004 0 01 04, **Designation:** 004001

A "Help" button is located below this information. The "Keys" section is a table with the following data:

Keys			
Key	Description	Attribute	Value
0	7003	Directory Number	7003
		CLID Entry (Numeric or D)	D
		First Name	Jane
		Last Name	Receptionist
1	Auto Dial	Number of Autodial Digits	
		Autodial DN	

The browser's status bar at the bottom shows "Done" and "Local intranet".

Figure 37 Telephone Details layout (features)

The screenshot shows the 'Web Desktop Services' interface in a Microsoft Internet Explorer browser window. The page title is 'Desktop Services - Microsoft Internet Explorer'. The browser's address bar is empty. The page features a blue header with the 'Nortel Networks' logo and navigation links: 'Home', 'Logout', and 'Help'. On the left side, there is a 'Web Desktop Services' logo and a 'Directory' menu with links: 'My Profile', 'Telephones', '7003', and 'Billing Reports'. The main content area is titled 'Features' and contains a table with three columns: 'Feature', 'Description', and 'Value'.

Feature	Description	Value
AEFD	Alternate External Flexible Call Forward	
AEHT	Alternate External Hunt DN	
AFD	Alternate Flexible Call Forward DN	
AHA	Automatic Hold	Denied
AHNT	Alternate Hunt DN	
ARHA	Audible Reminder of Held Call	Denied
ARTO	Alternate Redirection Time Option	0
CFHA	Call Forward/Hunt Override	Denied
CFTA	Call Forward by Call Type	Denied
DRG1	Distinctive Ringing Tone	High Fast Tone
EFD	CFNA DN for External Calls with CFTA	
EHT	Hunt DN for External Calls with CFTA	
FBA	Call Forward Busy for DID Calls	Denied
FDN	Flexible Call Forward No Ans DN	
FDSA	Force Disconnect	Denied
FNA	Call Forward No Answer	Denied
HUNT	Hunt DN - All Calls, or Internal Calls for CFTA	

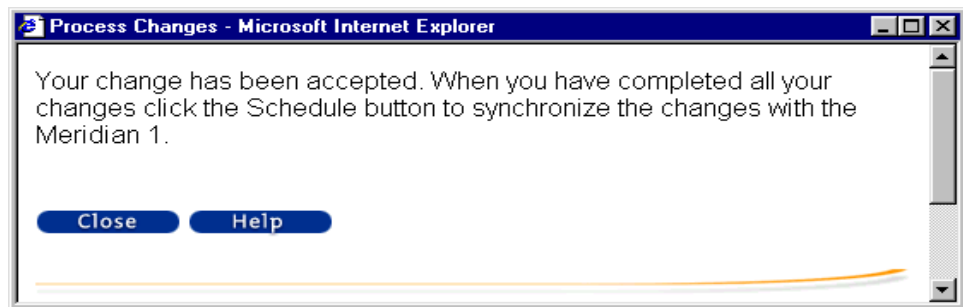
The browser's status bar at the bottom shows 'Done' and 'Local intranet'.

Change confirmation pages

A confirmation page appears when you click the Confirm button in the change summary page for the General, Keys, or Features tab. The confirmation page varies based on your access profile.

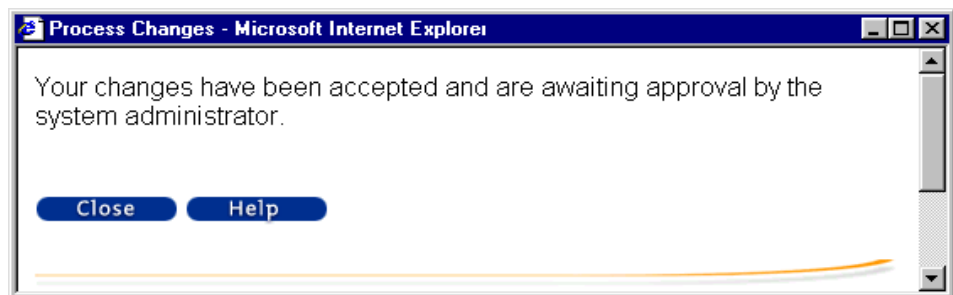
When your access profile allows the synchronization option, the page shown in [Figure 38](#) appears.

Figure 38 User confirmation with automatic synchronization

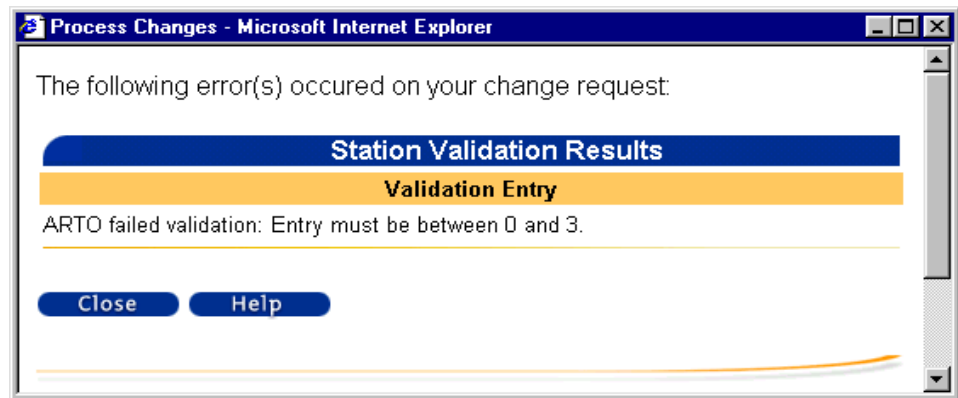


If your access profile does not permit automatic synchronization, the changes must be approved by the network administrator, and the page shown in [Figure 39](#) appears.

Figure 39 User confirmation when network administrator approval is required



If there is a validation error, you are presented with an error message similar to the example shown in [Figure 40](#).

Figure 40 Example of a validation error message

Telephone change procedure

The following procedure outlines the steps that you take to make changes to your telephone.

- 1 Launch a web browser, and then navigate to the OTM host name or IP address provided by your network administrator.
- 2 Log in to Desktop Services using the login name and password provided by your network administrator.

The My Profile web page appears. This contains your OTM directory information ([Figure 2 on page 13](#)).

- 3 Click a telephone extension link in the navigation bar.

The General page appears. If allowed by your network administrator, you can change the Station Location, Key Based Modules, and Designation fields ([Figure 3 on page 16](#)).

To make a change:

- a Enter the new value, and then click Submit.

A page containing a summary of your changes opens ([Figure 4 on page 18](#)).

- b Click Confirm.

A confirmation message appears ([Figure 38](#) through [Figure 40](#) beginning on [page -49](#)).



Note: The sync status of the telephone appears at the top of the Telephone pages. When the information for the telephone has been changed, but the changes have not been synchronized with the system, a Show Current configuration/Pending changes drop-down box allows you to select which configuration is shown. Once the telephone and the system have been synchronized, “Current configuration” appears at the top of the page, and the drop-down box no longer appears.

4 Click Keys.

The Keys page appears. If allowed by your network administrator, you can change the key-based features, or functions, assigned to any of the keys. To make a change:

a In the graphical representation of your telephone, click the key you want to change ([Figure 16 on page 29](#)).

b Click Change.

A list of the available choices for the selected key appears in the Key Change Wizard ([Figure 18 on page 31](#)).

c Select a new key-based feature to assign to the key, and then click Open.

d If required, the Key Change Wizard opens a page that requests that you enter the parameters for the selected key ([Figure 19 on page 32](#)). Enter the parameters.

e Click Submit.

A page containing a summary of your changes opens ([Figure 20 on page 33](#)).

f Click Confirm.

A confirmation message appears ([Figure 38](#) through [Figure 40](#) beginning on [page -49](#)).

5 Click Features.

The Features page appears. If permitted by your network administrator, you can change the allowed/denied status of features assigned to your extension ([Figure 21 on page 34](#)).

To make a change:

a Do one of the following:

- Select the appropriate value for the desired feature from the drop down box.
- Enter the value of the parameter associated with the desired feature in the edit box.

b Click Submit.

A page containing a summary of your changes opens.

c Click Confirm.

A confirmation message appears.

6 Click Details.

Information on the keys and features currently assigned to your telephone appears on the Details page. This page is always read only.

7 If a Schedule button appears at the top of the Telephones pages, your network administrator has permitted you to automatically synchronize all of the changes you have made with the information stored on the system. If there is no Schedule button, your network administrator reviews your changes and manually synchronizes the changes with the system. If the Schedule button is present:

a Click Schedule.

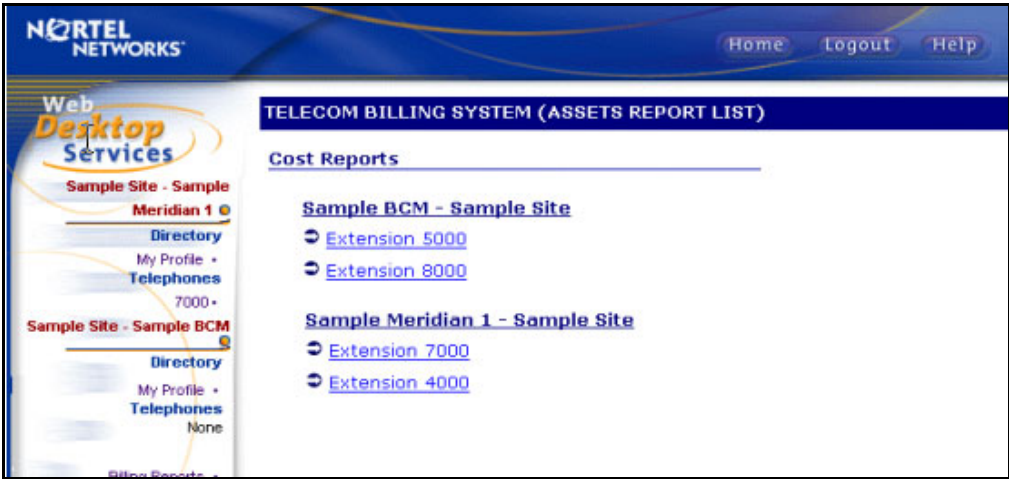
b Wait a few moments for the synchronization to occur.

c Click Refresh in your browser.

When the Show Current configuration/Pending changes drop-down list no longer appears, all of your changes have been made and the telephone has the new configuration.

8 If it has been configured by your network administrator, click the Billing Reports link in the Navigation Bar to view your telephone billing reports from the Telecom Billing System (TBS). TBS Web Reporting is available with OTM 1.2 and later.

Figure 41 Telephone Billing Reports



Telecom Billing System Web Reporting

Overview

Telecom Billing System (TBS) Web Reporting is the Optivity Telephony Manager's web-based reporting and telephone cost accounting and billing application for your telecom network.

With the Telecom Billing System you can:

- generate reports containing data from the Telecom Billing System through your intranet or Internet server about your organization's calling activities.
- collect call records from your telephone system.
- calculate usage costs based on defined rates and configurations.
- allocate costs to the appropriate users in your organization.
- generate reports summarizing and detailing these costs.

Accessing Telecom Billing System Web Reports

To log in to OTM Web and run Telecom Billing System Web Reporting, perform the following steps.

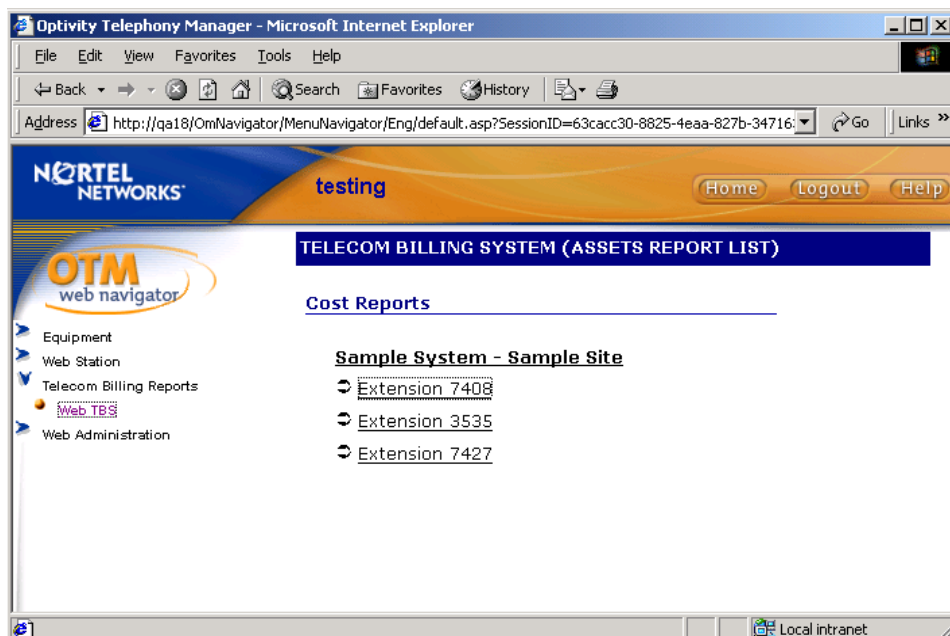
- 1** Log on to OTM Web by pointing your browser to the OTM Server.
- 2** From the Login page, enter your login name and password. This accesses the My Profile page. This page contains your user information, as well as links to the Web reporting applications to which you have access.
- 3** From the Desktop Services menu tree in the My Profile page, select Billing Reports. This accesses the Billing Reports page, which contains links to your Telecom Billing System reports.
- 4** From the Billing Reports page, access the Telecom Billing System Reports page by clicking a system link. You can also access your reports through any defined personal assets. This accesses the Telecom Billing System Reports page for the selected system or asset.

- 5 To view a report from the Telecom Billing System, click the report name in the Telecom Billing System Reports page. From here, you can select a telephone configuration table and any filters for the report.
- 6 Click Run Report to view the selected report.

Telecom Billing System Web Reports

Once you have logged in to OTM Web, you can view the Telecom Billing System Web Reports. The following is a sample page listing these reports:

Figure 42 Telecom Billing System Web Reports page



The following sections briefly describe the reports available for Telecom Billing System Web Reporting. Based on your access rights, some or all of these reports appear in this list.

Cost reports

The following reports provide summaries and details of your organization's telephone usage costs. These are based on your extensions, authorization codes, or account codes:

- Extension Report
- Authorization Code Report
- Account Code Report

Level reports

The following reports provide roll-up summaries of telephone usage costs for your organization based on extensions, authorization codes, or account codes. They access summary and detail reports displaying this data based on the organizational level. For example, the Extension Roll-up Report consists of the Extension Roll-up Report for the current organizational level, the Extension Summary Report for its sublevel, and so on, until you have reached the detail report for each user:

- Extension Roll-up Report
- Authorization Code Roll-up Report
- Account Code Roll-up Report

Frequency/Digits reports

The following reports provide roll-up summaries of your calling activity based on frequency of calls to specific numbers and locations:

- Frequently Called Numbers Report
- Frequently Called Location Report
- Area Code Summary Report
- Ring Time by Time of Day Report
- Ring Time by Extension Report
- Hold Time by Time of Day Report
- Hold Time by Extension Report

Trunk reports

The following reports provide call usage details for each trunk or trunk group in your organization:

- Trunk Group Utilization Report
- Trunk Utilization Report

Diagnostic reports

The following reports list all of the extensions and trunks that are entered in the telephone configuration that have no call activity, as well as all of the extensions and trunks that have call activity but have not been entered in the telephone configuration:

- Extension Diagnostic Report
- Trunk Diagnostic Report

Filters and configurations

The Filters page selects the reporting criteria for your reports, enabling you to generate reports based on very specific requirements. Whenever you select a report from the Telecom Billing System page, the Filters page displays a selection of filters.

The following is a sample Filters page for the Extension Report. Based on the report you select, the Filters page displays different filters:

Figure 43 Filters and Configuration page

Extension Report - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Sample System - Sample Site Extension Report

Corporation: **Acme Inc**

Costing Configuration: Web Reporting

Minimum Date: 9 / 10 / 2001

Maximum Date: 9 / 10 / 2001

Call Direction: Both

Duration(Seconds): *enter minimum call duration*

Cost: *enter minimum call cost*

Specific Extension(s): *example:100,250-300*

Employee First Name: *? matches 1 character, * matches 0 or more*

Employee Last Name: *? matches 1 character, * matches 0 or more*

Role/Project Name: *? matches 1 character, * matches 0 or more*

External Party Name: *? matches 1 character, * matches 0 or more*

Organization Level: Acme Inc

Exclude Sublevels: ☐

Telecom Billing System Web Reporting Sample Reports

The following are some sample reports that are available from Telecom Billing System Web Reporting.

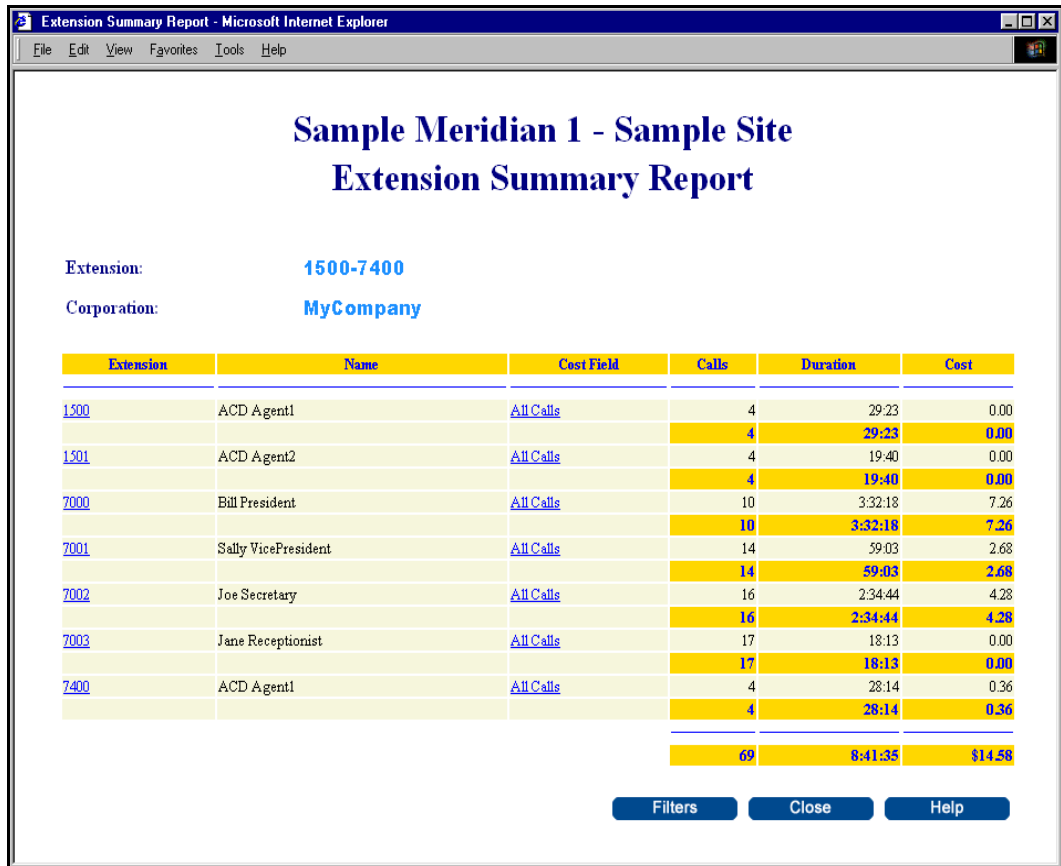
- [Extension Summary Report](#)
- [Extension Detail Report](#)
- [Authorization Code Detail Report](#)
- [Extension Roll-Up Report](#)
- [Authorization Code Roll-Up Report](#)
- [Frequently Called Numbers Report](#)
- [Frequently Called Locations Report](#)
- [Area Code Summary Report](#)
- [Trunk Utilization Report](#)
- [Trunk Diagnostic Report](#)

Extension Summary Report

The Extension Summary Report provides a summary of telephone usage for the extensions in your system. For each extension, it displays a summary of the total number of calls, the sum of the duration, and the sum of the cost.

From this report, you can drill-down to the Extension Detail Report to view the telephone usage details for each extension.

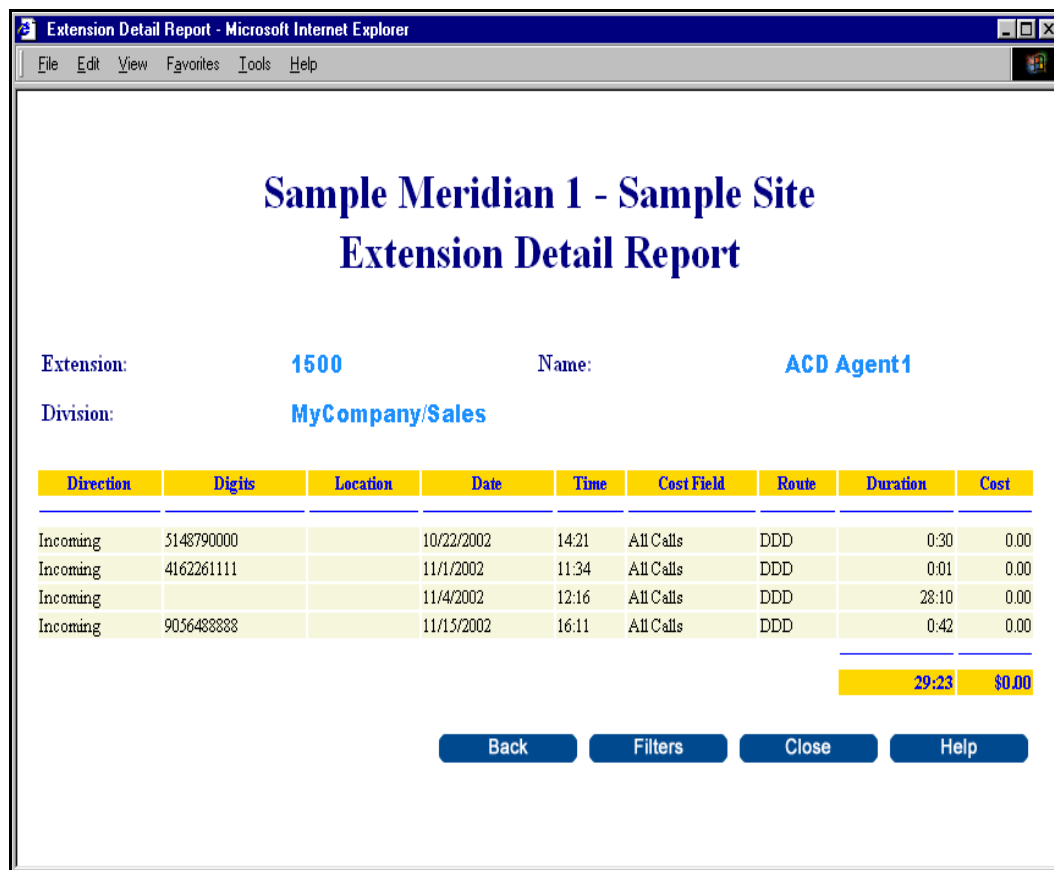
Figure 44 Extension Summary Report



Extension Detail Report

The Extension Detail Report provides a detailed listing of calls and summary totals for each extension in your system.

Figure 45 Extension Detail Report

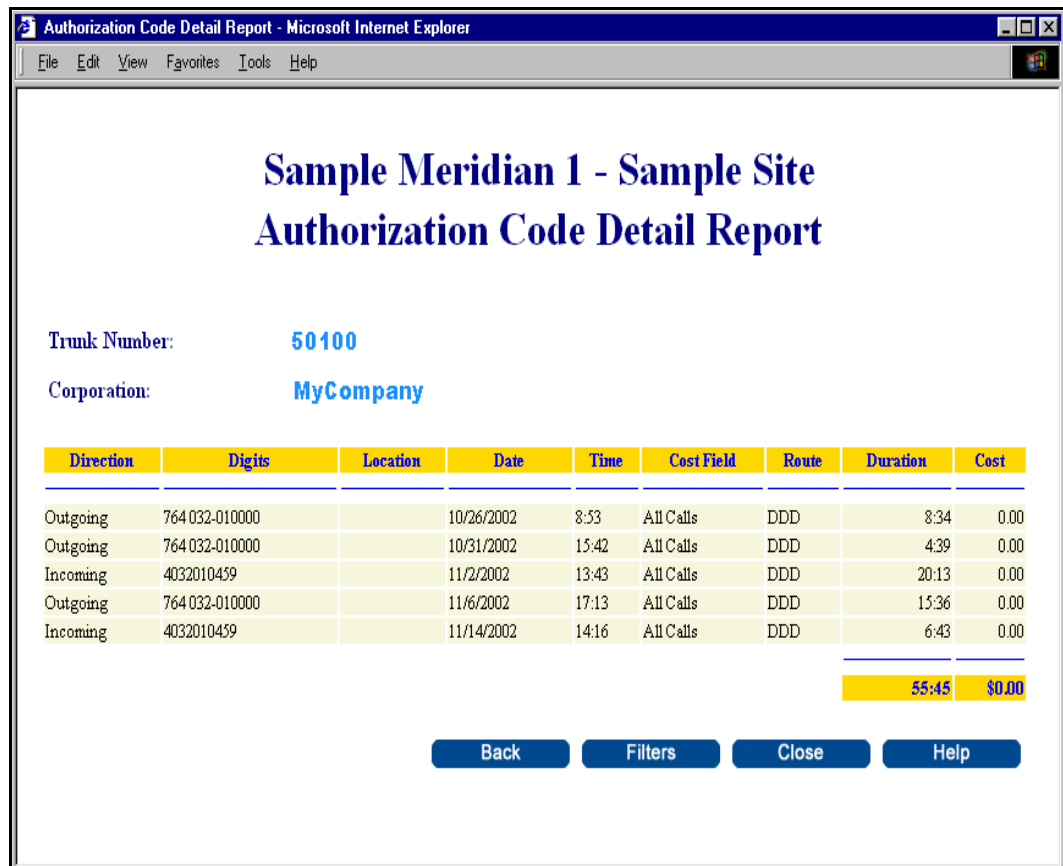


Authorization Code Detail Report

The Authorization Code Detail Report provides a detailed listing of calls and summary information for each authorization code user (such as Employee, External Party or Role/Project).

Calls having no authorization code or an authorization code which is not assigned to another user are charged back using the extension on the call. For security purposes, this report suppresses the display of the authorization code.

Figure 46 Authorization Code Detail Report

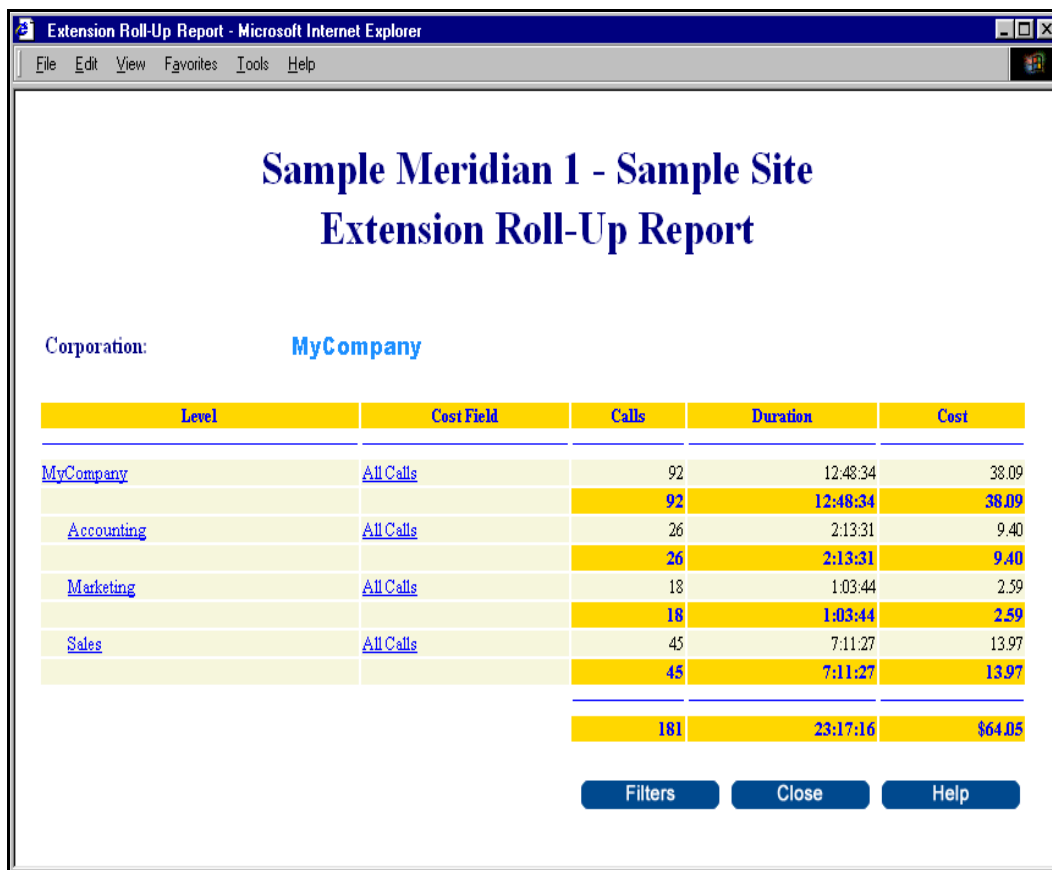


Extension Roll-Up Report

The Extension Roll-Up Report provides roll-up summaries of the telephone usage costs for entities in specific levels in the Corporate Directory. It lists each person and immediate sub-unit (that is, one level lower) attached at each level.

From this report, you can drill-down to the Extension Summary and Extension Detail reports to view the telephone usage details for the entities at these levels.

Figure 47 Extension Roll-Up Report



Authorization Code Roll-Up Report

The Authorization Code Roll-Up Report displays cost totals for calls made using an authorization code, extension, or trunk grouped by organizational node. For each organizational node, a summary is displayed that shows the total number of calls, the sum of the duration, and the sum of the cost.

From this report, you can drill-down to the Extension Summary and Extension Detail reports to view the telephone usage details for these authorization codes.

Figure 48 Authorization Code Roll-Up Report

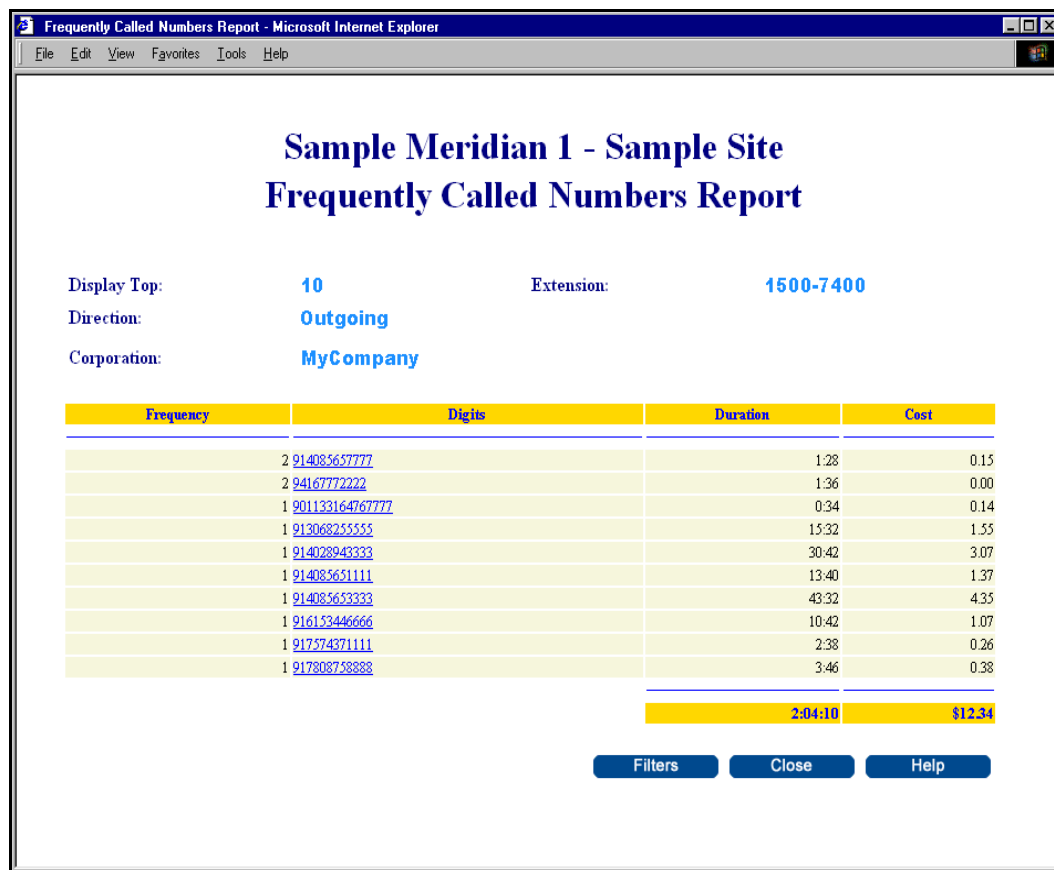


Frequently Called Numbers Report

The Frequently Called Numbers Report provides roll-up summaries of your calling activity based on the frequency of calls.

The report lists summaries of the calling frequencies as well as details listing each digit range, the number of times a call was made or received on the number and the cost.

Figure 49 Frequently Called Numbers Report

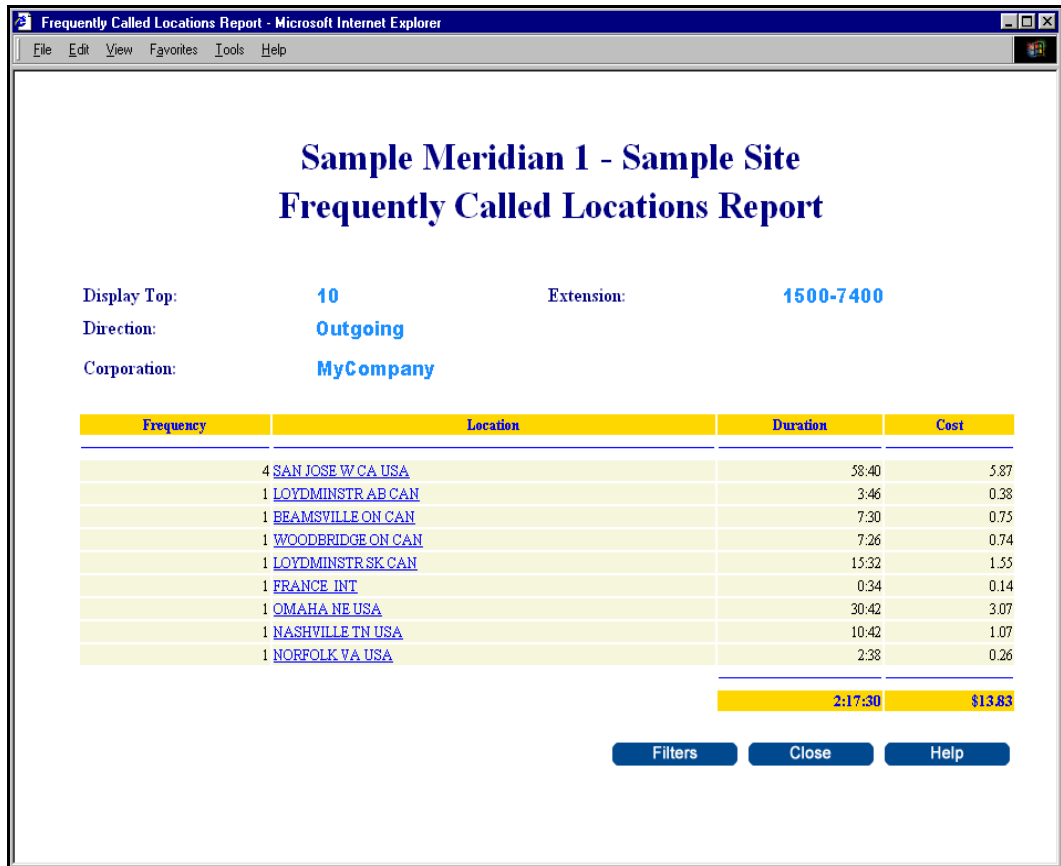


Frequently Called Locations Report

The Frequently Called Locations Report provides roll-up summaries of your calling activity based on the frequency of calls to locations.

The report lists summaries of the location frequencies as well as details listing each digit range, the number of times a call was made or received to the location including province/state and country, duration and cost.

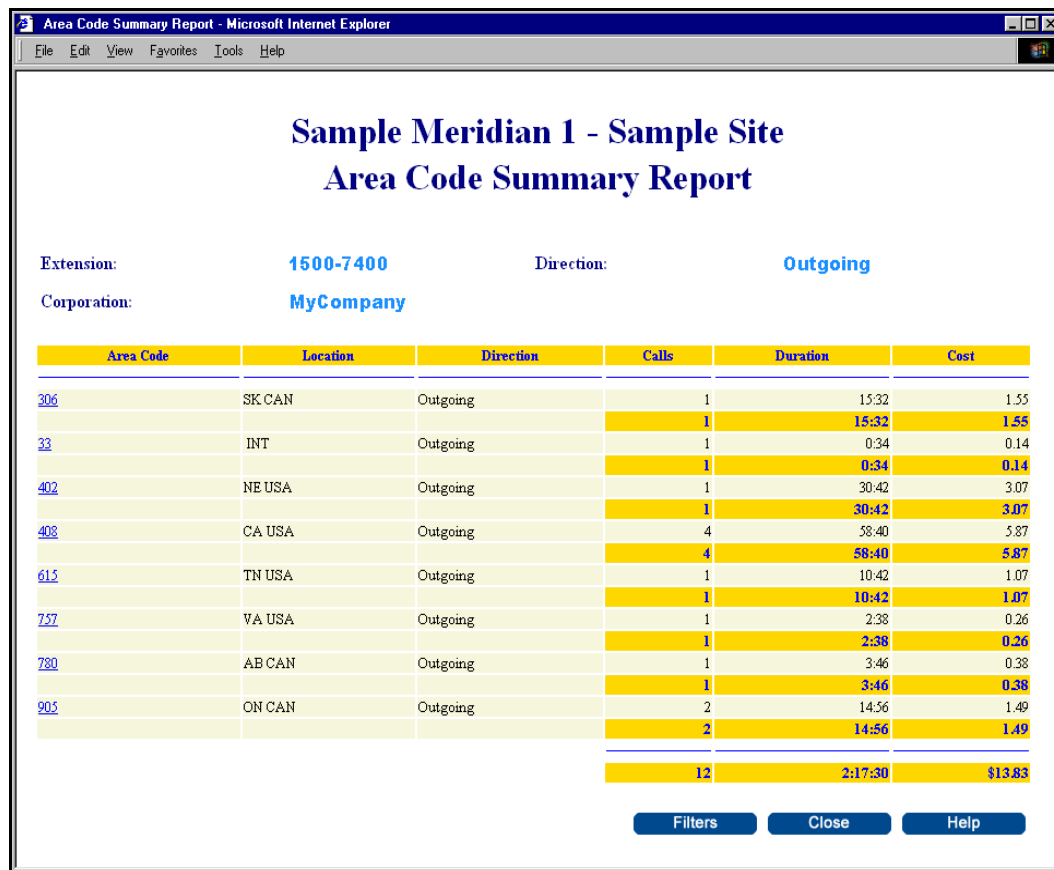
Figure 50 Frequently Called Locations Report



Area Code Summary Report

The Area Code Summary Report summarizes calling patterns by area code. The report includes the total count, duration and the cost of incoming and outgoing calls for each area code.

Figure 51 Area Code Summary Report

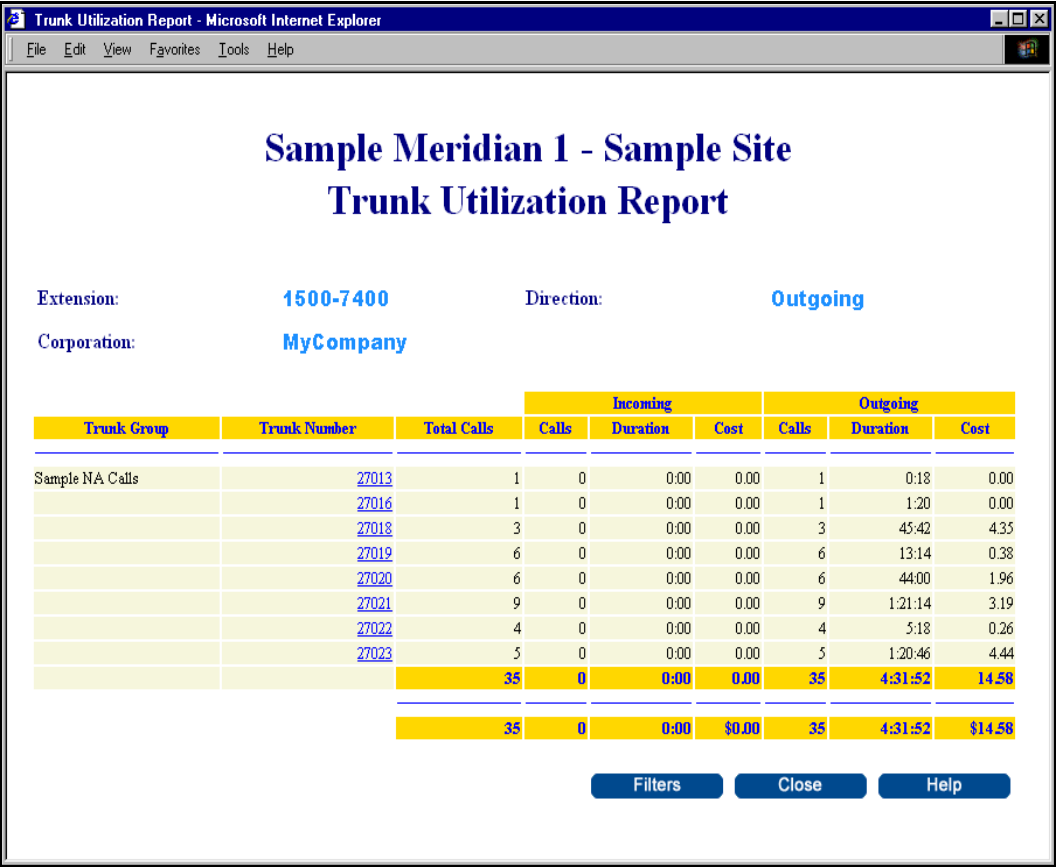


Trunk Utilization Report

The Trunk Utilization Report displays call usage details for each trunk or service in your system.

For each trunk, a summary is displayed that shows the number of incoming and outgoing calls, as well as the duration and cost for these calls.

Figure 52 Trunk Utilization Report

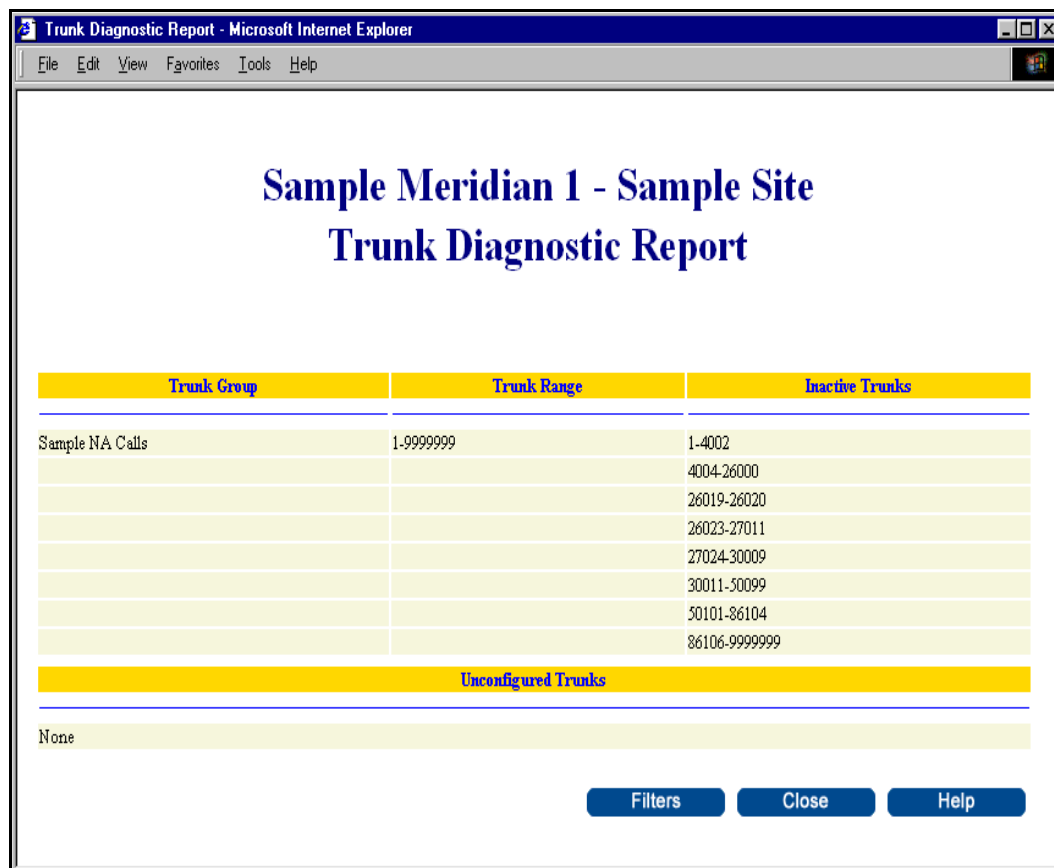


Trunk Diagnostic Report

The Trunk Diagnostic Report compares trunk ranges that you have entered in the telephone configuration with the trunks that have actual call activity during the filtered period.

The report lists all of the trunks that are entered in the telephone configuration but have no call activity, as well as all of the trunks that have call activity but have not been entered in the telephone configuration.

Figure 53 Trunk Diagnostic Report



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