



HPBX

USER GUIDE:
Business Group Administration (BGA CommPortal)



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Central Notification Contact Information Needed | Per FCC regulations, your HPBX system is configured to notify a central location on-site or off-site contact where someone is likely to see or hear the notification whenever a call is placed to a 911 operator. Relevant FCC Rules require operators and managers of the HPBX system to designate a contact that will be notified if a 911 call is placed from one of the users’ MLTS phones. It is your responsibility to provide Metronet with the relevant contact information in the Metronet Admin CommPortal. We would be pleased to assist you if you do not know how to identify such a contact. Please contact us by email at business-customer-service@metronet.com or phone at (855) 769-0936 if you need assistance.

Notify Metronet if You Move Your Phone | The location and address associated with a phone is the location and address identified on the initial service order when your HPBX service was installed. If you move your phone to a location or address that is different than that identified in the initial service order, 911 calls will appear to 911 emergency service operations to be coming from the address identified in the service order and not the new location or address. Your organization is responsible for managing and updating any changes to the location and address of the phone with dispatchable location information after the initial installation of your HPBX service. Dispatchable location information should include the validated street address where the phone is located and any adequately identify the location of the caller. In the event that you change the location of your phone, you can log on to the E911 Management Portal at <https://e911.metronetinc.com> to update the “Detailed Location for 911.” You may also update the location of your phone by contacting Metronet Business Customer Service at (855) 769-0936. Updates may take 1-2 business days to process. Failure to update the location of the phone with dispatchable location information means that emergency responders may not have information to locate the caller quickly and accurately.

Logging In

URL: <https://vm.mymetronet.net/bg>.

Login Information:

Number: _____

Password: _____

PIN: _____



Before We Begin

What is CommPortal Business Group Administrator (BGA)? It is a web portal enabling administrators to manage and configure features and settings associated with their account. Please be aware the Business Group Administrator (BGA) can change how the main line rings; an administrator can also reset a phone back to its factory settings and wipe out a voicemail box back to the factory settings losing all recorded greetings or messages stored within that box. It is very important you are careful. If you feel unsure about taking any actions within the BGA portal, please call Metronet Business Technical Support at 1-833-393-6857.

Overview

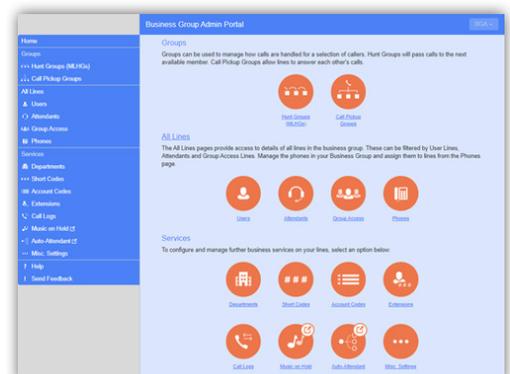
This tutorial will help you understand and use the most common features available within the CommPortal when you sign in as a Business Group Administrator (BGA). It only scratches the surface on the functions that can be accomplished through the BGA CommPortal.

BGA CommPortal is a web portal enabling administrators to manage and configure features and settings associated with their account.

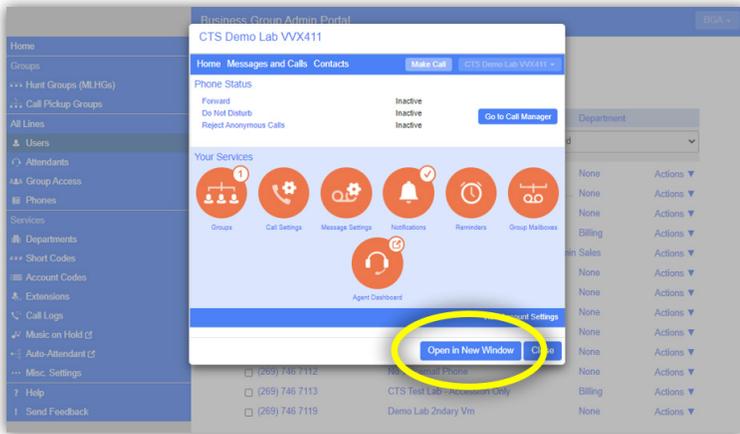
By the end of this guide, you'll be ready to:

- Reset Users' Passwords
- Manage Departments
- Assign Keys to a Phone
- Change the Name of a User
- Assign Users to a Hunt Group
- Set Up a Call Pickup Group
- Create Short Codes
- Configure Music on Hold

Upon login to the BGA CommPortal, you will see a menu on the left providing access to many features and services that can be modified for your Business Group. The options in the center are the same options as shown on the left. Click on an option to view or modify the settings associated with that option.



Resetting Users' Voicemail PIN/Password

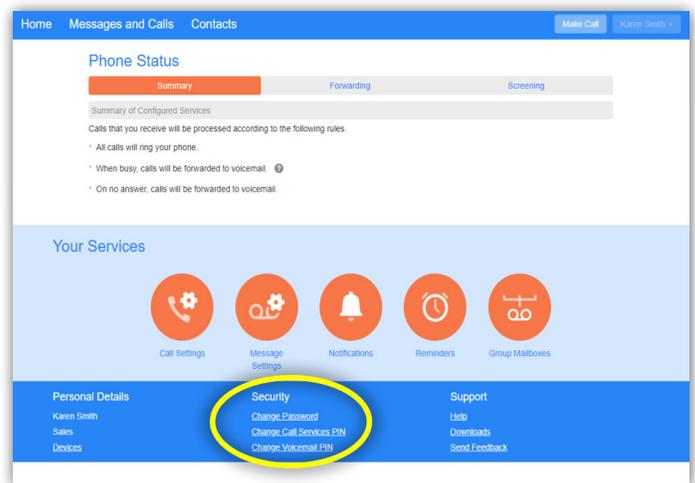


Each user with voicemail has a PIN in order to access their voicemails and if they are a Premium Voicemail user, they also have a password used to access their personal CommPortal.

To reset a user's PIN or password, click **Users**. Find the user you'd like to modify and click anywhere on that row. It will open a box to access that user's personal CommPortal. Click on **Open in New Window**.

In the blue bar at the bottom, Under *Security*, choose **Change Password** to change the CommPortal/Max UC password or choose **Change Voicemail PIN** to change the PIN used to access voicemail over the phone.

Note: The Call Services PIN is used for certain features, e.g. Remote Call Forwarding.



Managing Departments

Add Department

To add a new department, enter its name, select its parent department and then click **Add**.

Department Name:

Parent Department:

Operator Number:

Set limits on the number of calls this department can make:

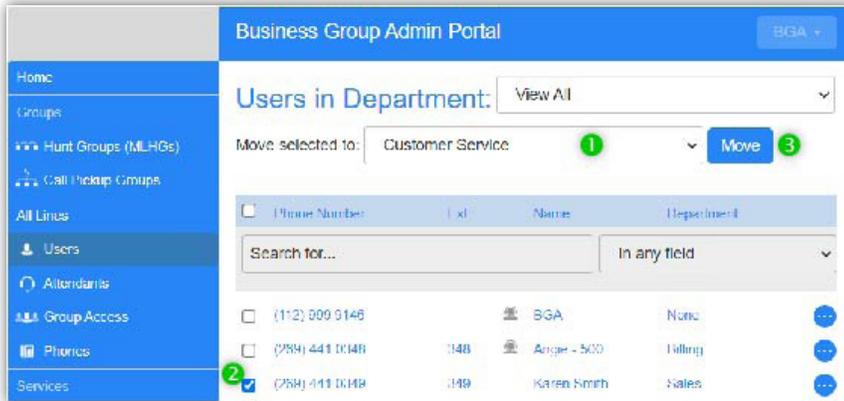
Incoming and Outgoing:

Incoming:

Outgoing:

Departments allow you to assign features that are specific to a group of phones. To add a department, click on **Departments** and then click **Add Department**.

Enter a *name* for the Department, select the *parent* whether that's the business group or a different department if you're creating a sub-department. Departments can have an optional *Operator Number* (zero out) specific for calls to that group of phones. When finished, click **Add**.



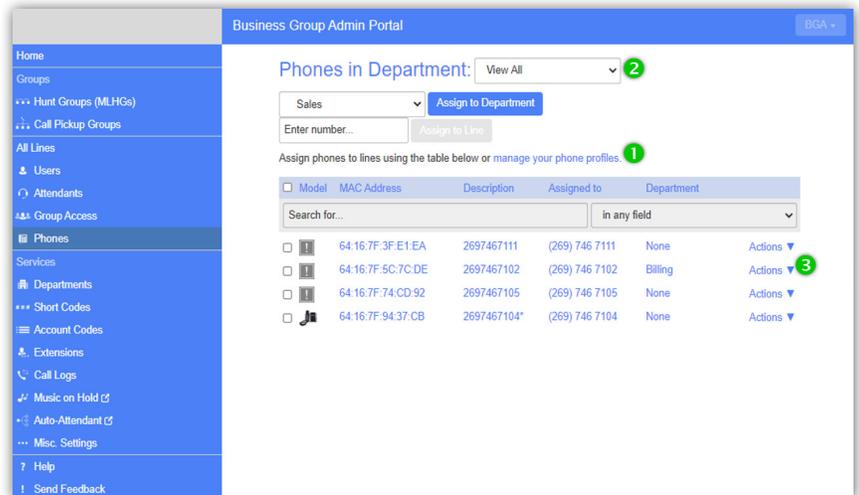
Once created, you can assign users to the department by going to Users. Click the checkbox next to a user (2) and use the dropdown at the top (1) to move (3) the user to the selected department.

As you view the rest of this guide, you will notice other programming options like phone programming, short codes, MLHGs, Music on Hold, etc. can be applied for the whole group or for a department. Use as necessary.

Assigning Buttons to a Phone

Your phone has programmable keys on the default lines screen (users with a sidecar have even more programmable keys available to them). Unused buttons that haven't already been programmed (e.g. your line key, Park keys, or any other keys that need to be on your phone) can be programmed as necessary, usually for things like Speed Dials or buttons for coworkers. To modify the buttons on a phone, click **Phones**. You will have the option to change:

- (1) All phones in your business group simultaneously*,
- (2) All phones in a specific department (when applicable),
- (3) Or individual phones as needed.



Example: Let's say you want to program a button for a coworker on everyone's phone in the office. You would click the link that says **Manage Your Phone Profiles** (marked with a 1 in the picture above). Program that button on every phone, however, please remember to then go to that particular coworker's phone and remove that button from their phone individually (click **Actions** next to their phone, marked with a 3 in the picture above, and choose **Configure Phone**). Leaving a button for a coworker on that coworker's phone is not only unnecessary but can cause the phone to malfunction.

Note: If you create or change a button at the business group level and an individual user has already programmed their own button on their phone, your change will **NOT override their change.*



When you've chosen what level at which to program, you will see the programming for the phones. There are many modifications that can be made here, but the most common changes will be regarding the buttons on the default lines screen of the phone. Open the dropdown for **Programmable Keys - Line Key**.

The most common types of buttons users may request are *Enhanced Monitored Extensions* for their coworkers or *Speed Dials* to external numbers.

Enhanced Monitored Extension

An Enhanced Monitored Extension key will blink when that coworker is getting an incoming call. The key will be solidly lit when that coworker is in an active call. These keys can also be used as a one-touch dial to call one another or as a quick way to transfer calls by pressing Transfer during an active call and then pressing one of these Enhanced Monitored Extension keys.

When programming a button as an *Enhanced Monitored Extension*, choose **Enhanced Monitor Extension** from the *Soft Key Action* dropdown. Type in the coworker's extension in the **Extension** field. In the **Label** field, type how you'd like the key to be labeled on the screen of the phone.

Note: Only populate the Extension and Label fields for that Key. Do not change the Line selection.

Speed Dial

Speed Dials allow a one-touch option to be able to call a number outside of your business group. You can also use these keys as a destination to transfer a call by pressing Transfer while in an active call, followed by pressing the appropriate Speed Dial key.

When programming a key as a *Speed Dial*, choose **Speed Dial** from the *Soft Key Action* dropdown. Type in the coworker's extension in the **Extension** field. In the **Label** field, type how you'd like the key to be labeled on the screen of the phone.

Save Changes

Be sure to save your changes. The **Save Changes** button will be found at the bottom right-hand corner of the screen. Whenever modifying keys on a phone, the phone will need to be rebooted to accept the new programming. Otherwise, you can wait overnight for the phone to accept the programming on its own.

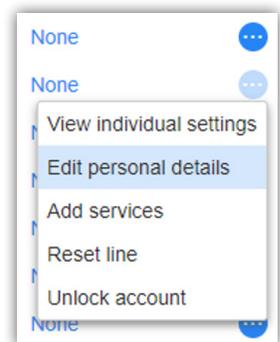
Change the Name of a User

Click on Users to view the lines in your group. Find the line that needs the name updated. *Note:* There are two fields you need to update in these circumstances:

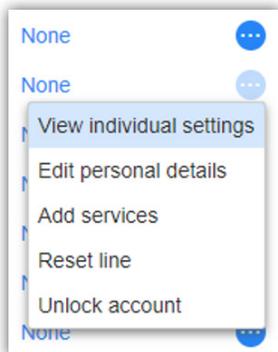
- The label of the line
- The internal caller ID

Line Label

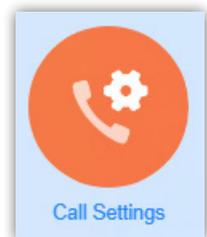
The label of the line is for internal use only to identify a line. To modify the label on the line, go to **Users** and find the line you need to modify. Click on **Actions** (the button with three dots) and then choose **Edit Personal Details**. The **Name** field is the label for that line. Edit as appropriate and hit **Save**.



Internal Caller ID



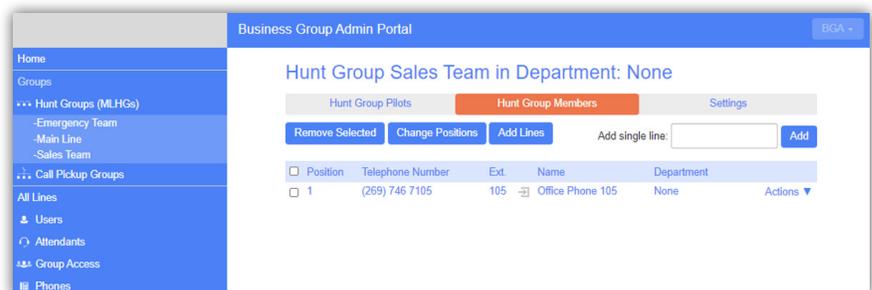
To modify the internal caller ID used for a line, go to **Users** and find the line you need to modify. Click on **Actions** (the button with three dots) and then choose **View Individual Settings**. In the box that pops up, click on the orange circle that says **Call Settings**. In the field that says, *If not withheld, signal my name as*, enter the caller ID you'd like to display when calls are made from that phone to coworkers. The maximum number of characters is 15.



Assigning Users to a Hunt Group

If you currently have a hunt group and would like to modify the members, click on Hunt Groups (MLHGs).

Click on anything in that row for the hunt group you'd like to modify. Then click on **Hunt Group Members**.



From here you can remove, add, or rearrange the members of a group. Click on a member and select Groups in the window that pops up to be able to log that member in and out.

Click **Settings** to modify the call distribution. Options include:

- Linear
- Circular
- Ring All
- Uniform (Round Robin)
- Uniform (Longest Idle)

Setting Up a Call Pickup Group

Call Pickup Groups enable users to pick up the line on another user’s phone when their line is ringing. To set up a Call Pickup Group, click **Call Pickup Groups**.

To add a new Call Pickup Group, click **Add Group**. Enter in the name of the group and hit **Add**. Once created, click on that group to add members.

Once configured, the feature is active and any user within the pickup group can pick up a ringing line on any of the other users’ phones by dialing *11 or by programming a Call Pickup button on their phone.

Creating Short Codes

Short codes allow users to quickly dial commonly used phone numbers from their phone in a more time-efficient way. To modify your group’s short codes, click on **Short Codes**.

To add a short code, click **Add**. If you want to add a range of short codes for sequential telephone numbers, click **Add Range**. Choose what you’d like your code(s) to be and then enter the telephone number(s) to which you’d like the code to map.

Once configured, users in your business group can use these codes to place calls from their desktop phones and/or MaX UC applications.

Music on Hold

Music on Hold (or Messaging on Hold) is an audio file that is played when a user places a call on hold or Park.

Click **Music on Hold** to open the Music on Hold portal. To add a new file, click the **Resources** tab. Enter a two-digit *ID number*, *description*, and then click **Choose File** to locate the file on your computer. Click **Add**. Once successfully added, click **Edit** next to your uploaded file and **change the gain to -3**. Hit **Save**.

To apply the uploaded resource, go back to the **Mappings** tab. To use that file for your entire group, click **Edit** next to the *Default*. If you have different files for individual lines or departments, those can be added to override the Default.

