

ITS Cloud Unified Communication
Enhanced Platform

User Guide



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Introduction

Welcome to the ITS Cloud Unified Communications Platform User Guide. Your new Cloud Unified Communications Platform combines the best in traditional phone system features with modern Internet Protocol (IP) capabilities as well as communication features like Instant Messaging, Conference Calling and Voicemail to Email features, bringing you the latest technology to enhance and enable seamless communication.

In this guide you will learn how to perform many common tasks on your phone as well as through the web portal.

Your new phones have a number of buttons that are labeled on the phone. They also have softkeys. Softkeys are buttons with functionality that changes based on how you are using your phone.



Using your Desk Phone

In this section we will cover the following topics:

- Making Calls
- Receiving Calls
- Voicemail Messaging
- Handling Calls

While there are many different models of desk phones, they largely all work the same way. In this section you will learn how to use the common functions on your phone.



Making Calls

Making a call with your phone does not require you to dial a leading 9 and you can now dial on-hook or off hook.

1. To Dial on-hook
 - a. Dial the phone number
 - b. Pick up the handset, headset, or push the speaker button
2. To Dial off-hook
 - a. Pick up the handset, headset or push the speaker button
 - b. Dial the number
 - c. There may be a short delay when making calls this way, to eliminate the delay, push the Send button.

Calls to the US and Canada are all dialed using 10 or 11 digits.

Making International Calls

By default international calling may not be allowed. If your international call doesn't go through, contact your system administrator.

Typically international calls are disallowed to prevent fraud.

1. To Dial an International number
 - a. Dial the international call code 011
 - b. Dial the country code
 - c. Dial the local number

Extension Dialing

Extensions on your system can be dialed using their three or four digit extension or, if configured, by pressing the button on your phone corresponding to the desired extension.

Using the Intercom

VoIP phones provide an intercom feature that allows you to instantly connect to other phones within your office. Intercom functionality is ideal for announcing visitors or asking a quick questions.

When one phone intercoms another extension, it does not ring the other phone, instead the other phone will beep and then its microphone and speaker turn on.

To place an Intercom Call

- a. Dial 08 then the extension. For example to intercom extension 100, dial 08100

Receiving Calls

When a call comes in, you can answer it via the handset, a head set or by pushing the **Speaker** button.

To answer a call using the Handset

- a. When the phone rings, lift the handset off-hook.

To answer a call using a Headset

- b. In most cases you'll press the button on the headset or press the headset button on the phone, but the process could vary depending on the model of headset and how it is connected.

To answer a call using the Speakerphone

- c. Press the **Speaker** button.

Voicemail

Voicemail with your new system is accessible from your phone, the web portal and your email (once you have set it up to go to your email). When you have a new voicemail, your phone should have a red light indicator and **Message** button will be lit. Note that voicemail messages are stored in the system for 30-days. After 30-days, they are automatically deleted. If you would like to keep a voicemail, you can download it to your computer using the download feature in the portal (see page 18).



To accessing Voicemail

- a. Press the **Message** button on your phone to access your voicemail box or dial 5001 if your phone doesn't have a message button.
- b. If you have access to multiple voicemail boxes, a list of mailboxes may be presented. Select the mailbox you want to access.
- c. When prompted, enter your voicemail PIN and then press the # key.

To access another person's mailbox

- d. Dial 5000
- e. When prompted, enter the other person's extension number
- f. Enter the voicemail PIN of the other person's mailbox followed by the # key

Voicemail Set-up

The first time you log into your mailbox you will be walked through the following:

1. Recording your name for the directory
2. Recording your personal greeting

The name recording is for the dial by name directory so that when someone enters the first three letters of your last name, it will playback your name recording allowing the caller to then be routed to your extension.

The greeting plays when your mailbox is reached. It is very important to record a custom message as many callers won't leave a message in a mailbox with a generic greeting.

Alternate Greetings

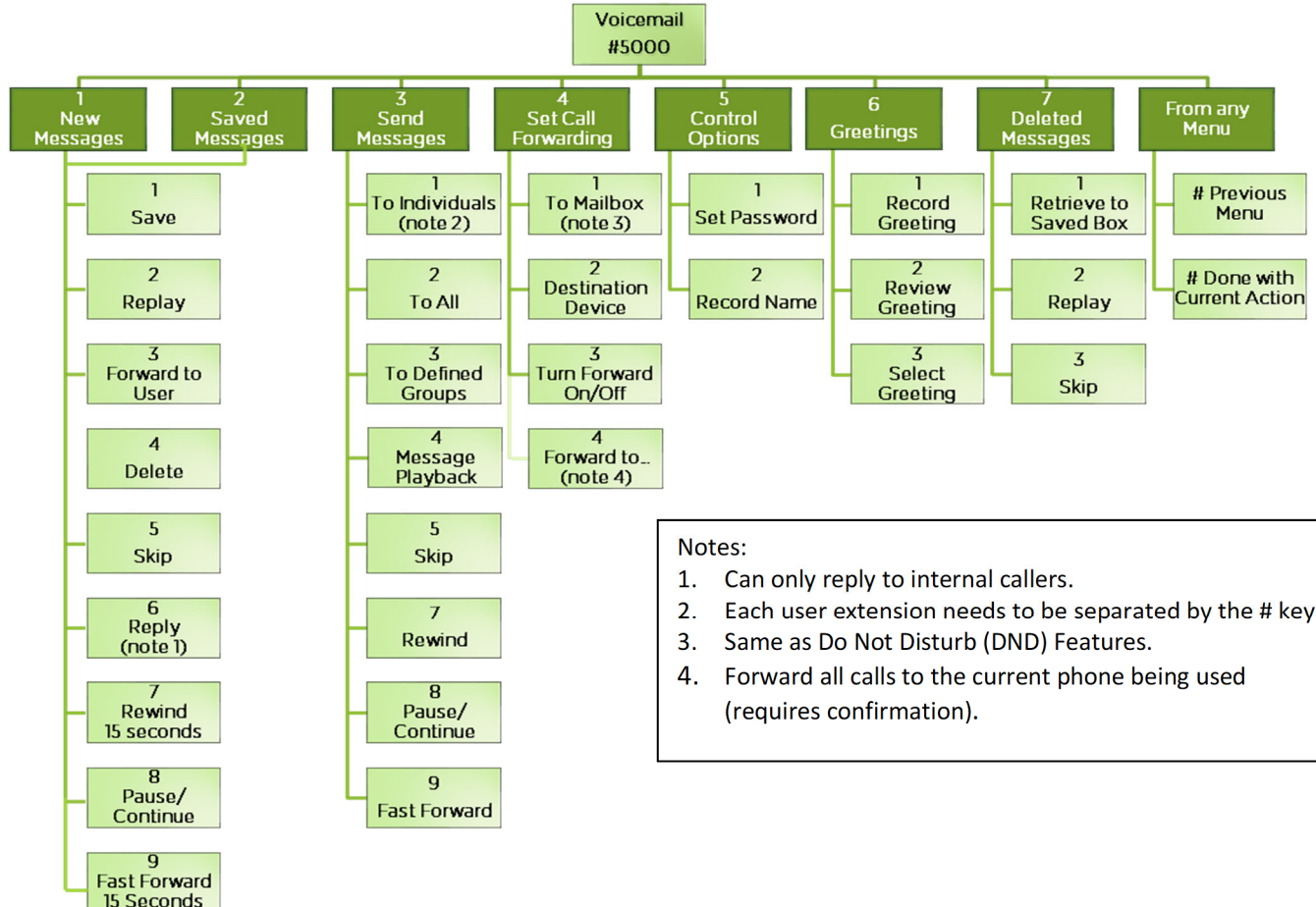
Your mailbox supports multiple greetings for different scenarios like business trips, vacations and holidays.

To Record an Alternate Greeting

- Once you are logged in your mailbox, press 6 for greetings and then press 1 to record an alternate greeting.
- When prompted for the greeting number, press 2 for your next alternate greeting (#1 is your default greeting).
- After your recording is completed, select the active greeting by selecting option 3 in the greetings menu.

Voicemail Tree

Below is the voicemail tree that show visually how you can navigate your voicemail box.



Handling Calls

The UC Platform features various ways to move calls around, including attended transfer, unattended (or blind) transfers, voicemail transfer, call park and more. In this section, references to BLFs are the one-touch buttons to extensions common at front desk phones.

Attended Transfer

Attended transfer allows you to speak to the person you are transferring the call to prior to completing the transfer and automatically places the caller on hold.

To perform an attended transfer

- a. Press the **Trans** softkey on your phone
- b. Dial the recipient's extension or press their BLF.
- c. Once the call is picked up, speak to the recipient, and then either press the **Trans** softkey again to complete the transfer or press the **Cancel** softkey to take the call back.

Blind Transfer

Blind transfer allows the transfer of the call directly to the recipient.

To perform a blind transfer

- a. Press the **Trans** softkey on your phone
- b. Dial the recipient's extension
- c. Press the **Trans** softkey again to complete the transfer

Transfers to External Numbers

A transfer can also go to an external number such as a cell phone. Follow the transfer directions for Attended Transfer or Blind Transfer above, but rather than dialing an extension, dial a 10 digit phone number.

Voicemail Transfer

Voicemail transfer goes straight to the recipient's voicemail box without ringing the recipient's phone.

To perform a voicemail transfer

- a. Press the **Trans** softkey on your phone
- b. Dial 03, then the recipient's extension
- c. Press the **Trans** softkey again to complete the transfer

Call Park and Hold

On your phone system, hold is a local function. This means a call held on your phone cannot be picked up at another station. Call Park however is a system-wide function, allowing a call that is parked on one phone to be picked up by any other phone in the system.

To place a call on hold

- a. Press the **Hold** softkey while on a call.
- b. To pick the call back up press the **Resume** softkey.

To park a call

- c. When on a call, press the **Park** softkey.
- d. The system will state “the call is parked at 7xx”.
- e. Hang up.
- f. You can now announce via intercom or a separate paging system that “a call for XYZ is parked on 7xx”.
- g. To retrieve the parked call, dial 7xx where xx is the number stated by the system.

Directed Call Pickup

Directed call pickup allows you to answer a call that is ringing on another phone.

To perform directed call pickup

- a. Dial 07 then the extension. For example if ext. 111 is ringing, dial 07 then 111 to pick up that call.
- b. Phones with BLFs to the ringing station can also press the corresponding BLF.

3-Way Conference

Three way conferencing allows you to add a third participant to a call.

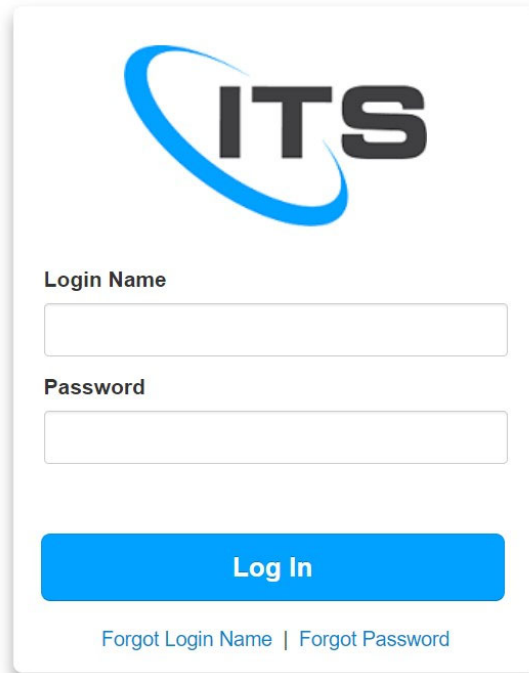
To make a 3-Way Conference

- a. Dial the first number you want to conference with or answer the incoming call.
- b. Once connected, press the **Conf** softkey.
- c. Dial the second number you want to conference in.
- d. When the second call is answered, press the **Conf** softkey again and all three calls will be connected.
- e. To end the call, hang up the handset.

ITS Cloud Unified Communications (UC) Web Portal

Using the Portal is an alternate way to set up how your calls are handled.

To login to the portal, visit <https://voice.itstelecom.com>



ITS

Login Name

Password

Log In

[Forgot Login Name](#) | [Forgot Password](#)

[Are you a new user?](#)

Powered By: ITS Telecom

Manager Portal: Version 42.0.9

You can write your login name and password here for future reference.

Login Name: _____

Password: _____

Portal Home Screen

Once you have logged in, the Home screen will be displayed. The Home screen shows a summary of your call activity (call history, messages, active rules, devices, etc.). To navigate through the portal, simply click on the buttons across the top.

NEW VOICEMAIL MESSAGES »

From	Date	Duration
2701 Sergio De La Fuente	Today, 3:47 pm	0:29

ACTIVE ANSWERING RULE »

ITS Daytime

Simultaneously ring:

- x2706

ACTIVE PHONES »

2706	Yealink SIP-T27G 69.84....
------	----------------------------

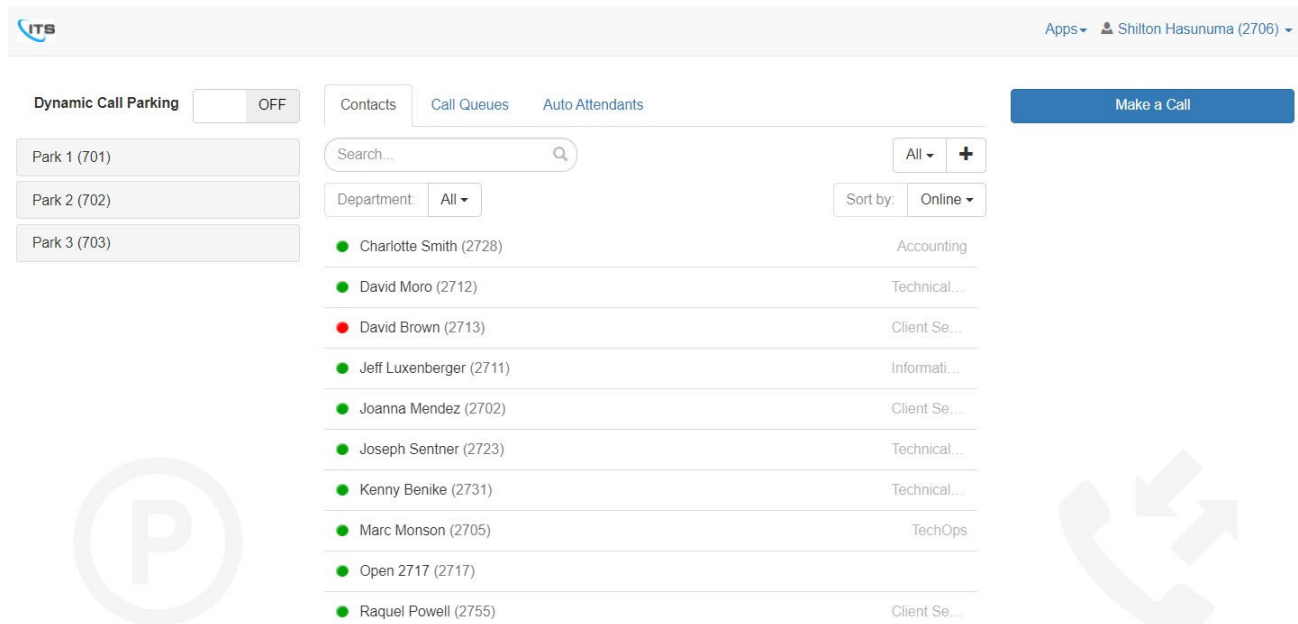
RECENT CALL HISTORY »

Number	Name	Date	Duration
2701	Sergio De La Fuente	Today, 3:46 pm	1:02
5001		Today, 3:43 pm	0:22
(310) 210-5705	HASUNUMA SHILTO	Today, 3:41 pm	0:46
(262) 617-0971	DRESCHER MICHAEL	Today, 3:16 pm	0:06
(818) 325-2088		Today, 3:08 pm	0:47
(818) 846-6622		Today, 3:06 pm	0:48
(818) 397-5690		Today, 11:52 am	3:20
(818) 567-1962		Today, 11:46 am	5:41

Stratus Console

The Stratus Console (under “Apps” top right drop down) gives you visibility of calls and a more intuitive way to handle them all from your PC. This is very useful for receptionists and administrative personnel who are responsible for handling calls for others. The Stratus Console allows you to easily identify if someone is available to take a call.

- Green indicates they are available
- Red indicates they are on a call
- Grey indicates they are not logged into the system
- A Green dot with a blue mark in it indicates an incoming call.



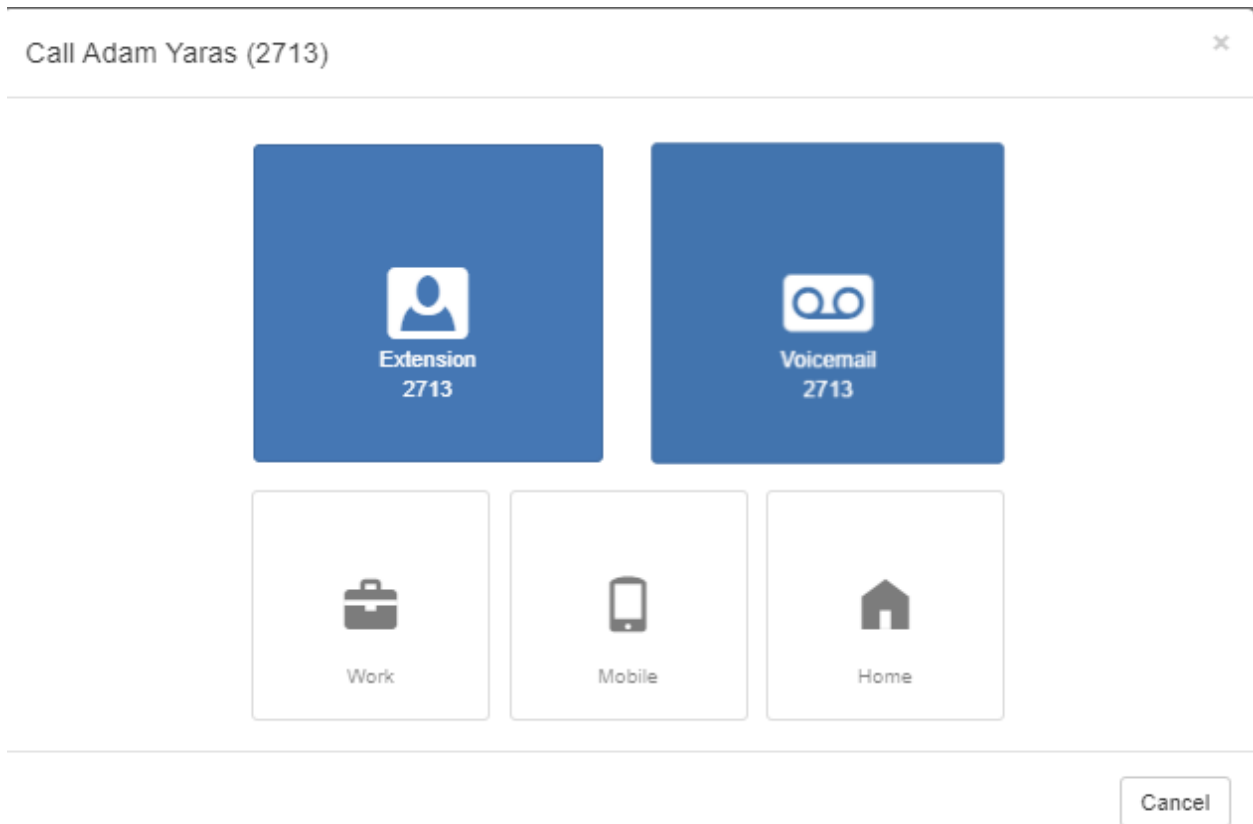
The screenshot shows the Stratus Console interface. At the top left is the ITS logo. At the top right, there is a user profile for Shilton Hasunuma (2706) and a dropdown menu for Apps. Below the header, there is a section for Dynamic Call Parking with a toggle switch set to OFF. To the right of this is a navigation bar with tabs for Contacts, Call Queues, and Auto Attendants. A large blue button labeled 'Make a Call' is positioned to the right of the navigation tabs. Below the navigation bar is a search bar and a list of contacts. The contacts list includes names, extension numbers, and departments. The status of each contact is indicated by a colored dot: green for available, red for on a call, and grey for not logged in. A large 'P' icon is visible on the left side of the interface, and a large telephone handset icon is on the right side.

Name (Extension)	Department	Status
Charlotte Smith (2728)	Accounting	Available
David Moro (2712)	Technical...	Available
David Brown (2713)	Client Se...	On a call
Jeff Luxenberger (2711)	Informati...	Available
Joanna Mendez (2702)	Client Se...	Available
Joseph Sentner (2723)	Technical...	Available
Kenny Benike (2731)	Technical...	Available
Marc Monson (2705)	TechOps	Available
Open 2717 (2717)		Available
Raquel Powell (2755)	Client Se...	Available

The Stratus Console also allows you to dial someone right from the Console.

To make a call to a Contact from the Stratus Console

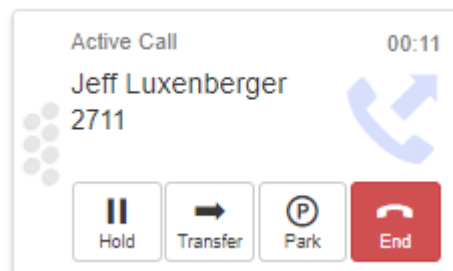
- Click on the name of the person you want to call.
- When the Call window pops up you have the option of selecting their extension or voicemail. If you have their detailed contact information, you also have the option of calling them at another work number, on their mobile device or at home.
- Once you select the number you want to call them at, click the number and your phone will ring.
- When the handset is picked up the call will go through.



Call Handling from the Stratus Console

While logged into the Stratus Console and on an active call the information about the call will be displayed and on your screen you will have the option of:

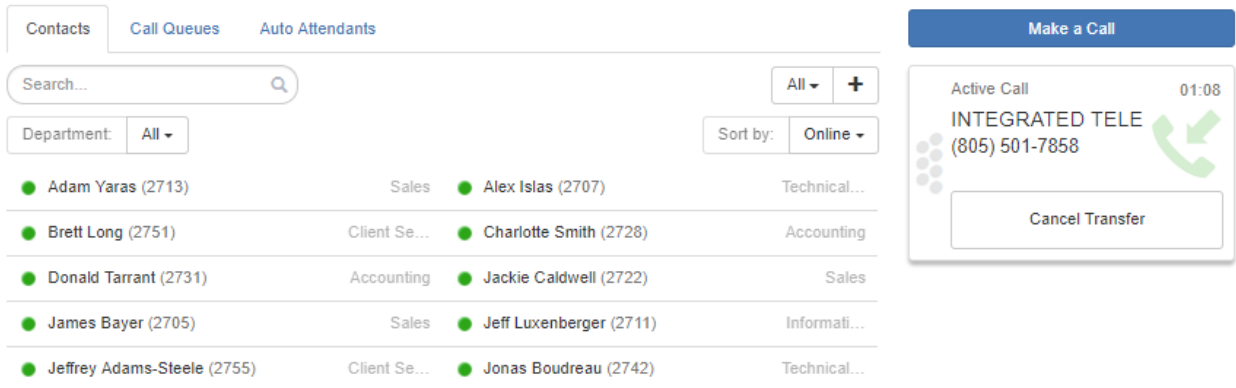
- a. Putting the call on hold.
- b. Transferring the call.
- c. Parking the call.
- d. Ending the call.



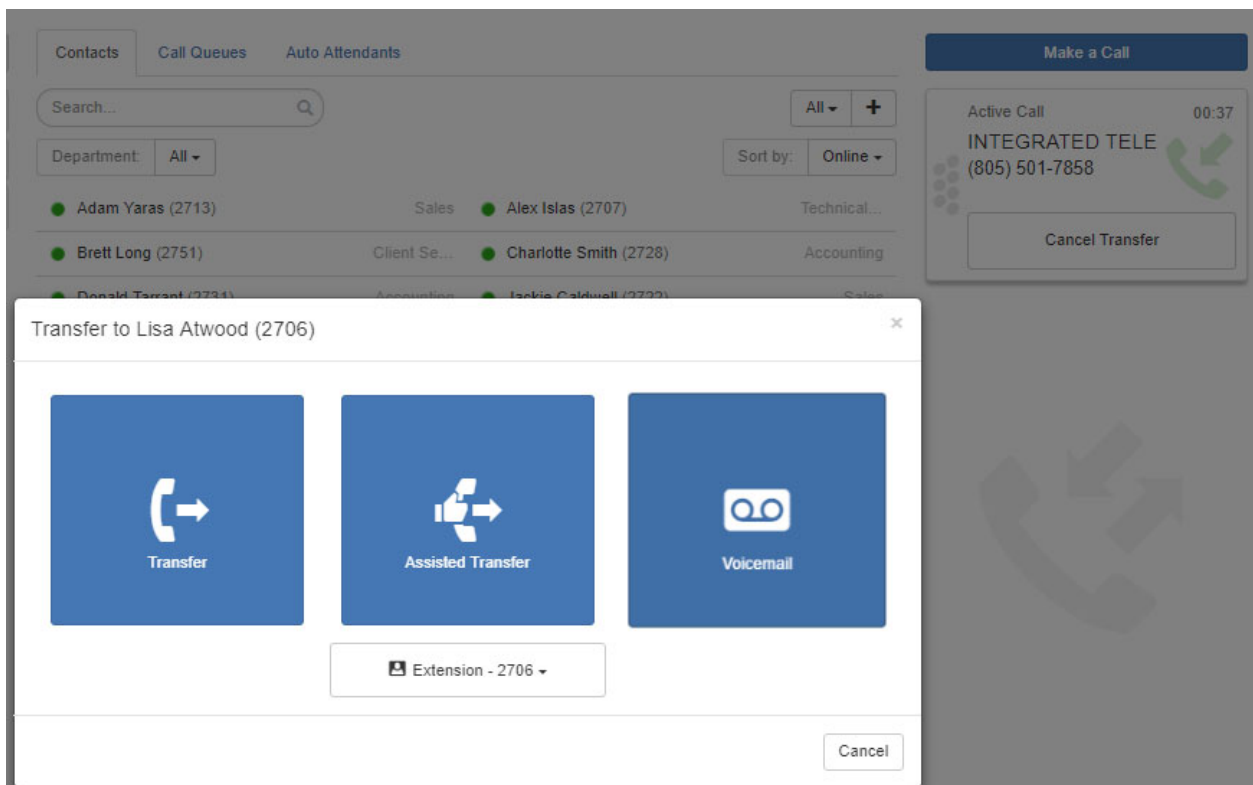
To Transfer a call with the Auto Attendant

- a. Click the Transfer button

- b. A new window will open allowing you to select the person you would like to transfer the call to



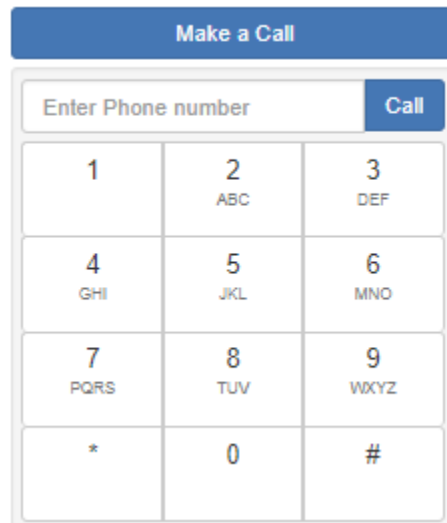
- c. Click on the name of the person to transfer the call to
d. Another window will open allowing you to select the type of transfer you would like to do:



- i. Transfer immediately transfers the call from your number and releases it.
ii. Assisted Transfer allow you to announce the caller.
iii. Voicemail allows you to transfer the caller directly to the person's voicemail box.
iv. You also have the option to choose another extension or cancel.

Make a call to any number from the Stratus Console

- Select the Make Call button on the top right.
- When the dial pad opens, dial the number you want to call.
- Click the call button.
- Your phone will ring and when you pick it up the call will go through.



User Profile

At the top right of the window, you will see your name and extension.



If you click your name, then select Profile, your user profile screen will open up. Here you have the ability to:

- Change the name displayed.
- Change your time zone.
- Determine if your name is announced in the audio directory.
- Determine if your name it appears in the directory.

You can also view the caller ID information that callers will see when you call them from your extension.

NOTE: You cannot change this information as it is maintained by the system administrator.

To set up email address for voicemails to be sent

- a. Enter your email in the email field.
- b. If you would like voicemails to be sent to another email address click the plus button on the right and then enter an additional email address.
- c. Click Save.

To change your portal password

- a. Enter a new password in both of the new password fields and then enter your existing password in the current password field.
- b. Click Save.

To change your voicemail PIN

- a. In the New PIN field enter your new Pin.
- b. Click Save.

The Voicemail Pin is the number you use to access your voicemail box from your phone.

Profile ×

First Name

Last Name

Timezone

Directory Options Announce in Audio Directory
 List in Directory

Caller ID Information

Area Code

Caller ID
You cannot edit your Caller ID

911 Caller ID
You cannot edit your 911 Caller ID

Change Account Security

Email Address(es) +

New Password

Confirm New Password
Minimum length of 8 characters, minimum of 1 capital letter(s), minimum of 1 number(s).

Current Password
Your current password is required to update your email address or security information.

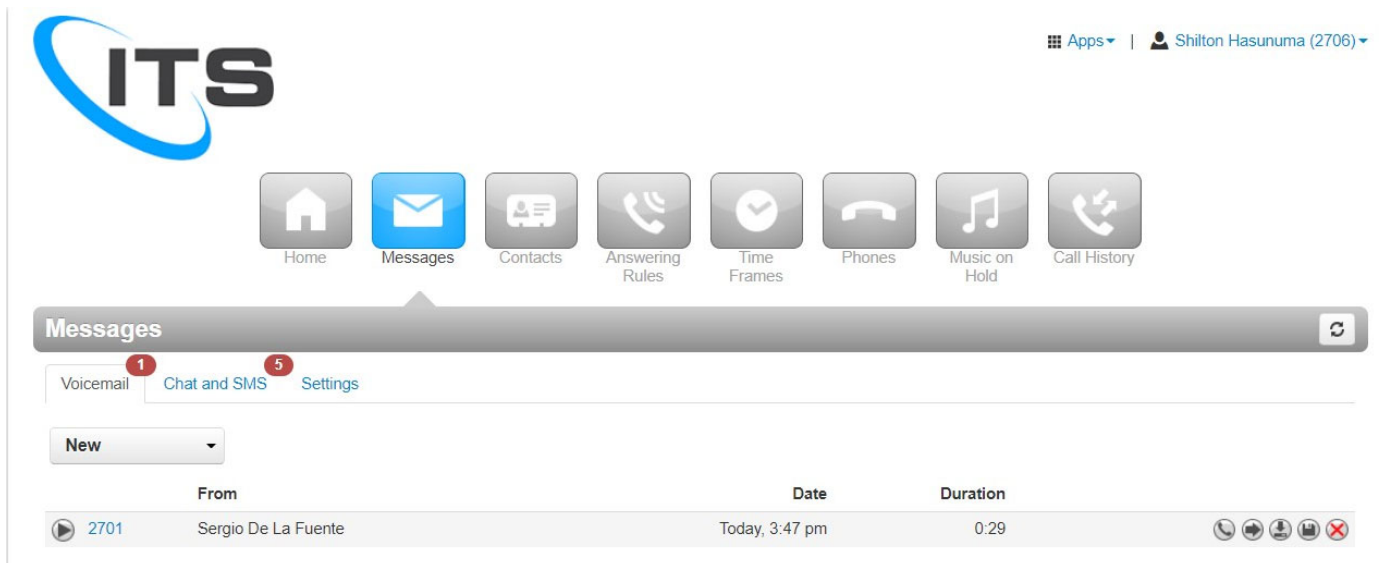
Change Voicemail PIN

New PIN
Minimum length of 4 characters.







Please note: It is important to establish unique passwords and PINS. As with everything that is accessible through the internet, secure passwords and PINS that are not simple like 1234 or 9999 should be established to prevent system hacking.

Messages Screen



The Message screen allows you to view and manage messages and messaging options.

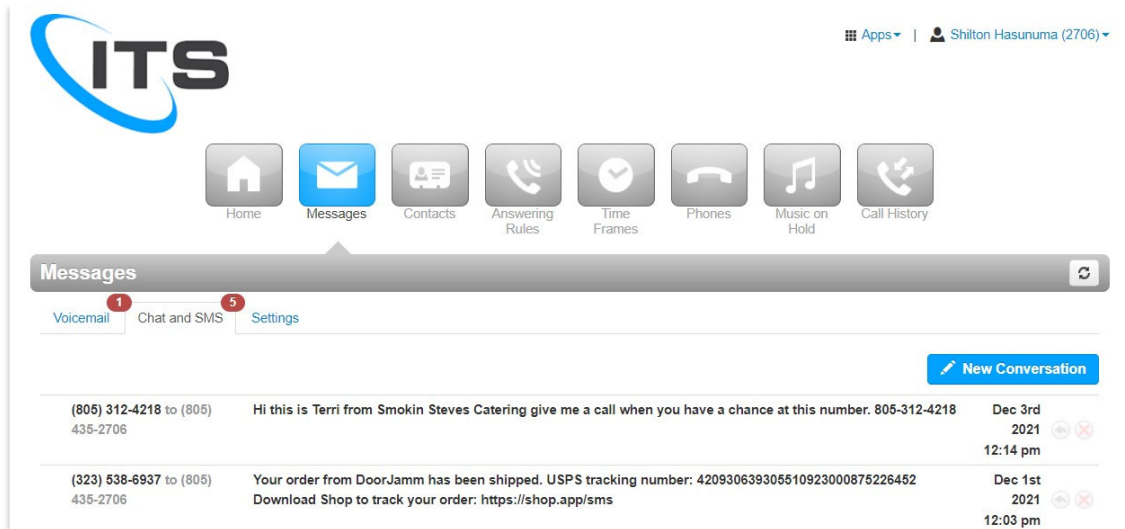


The [Voicemail tab](#) will display all of your voicemail messages. From here, you can:

- a. Click the  arrow on the left and it will play the message.
- b. Click on the [\(805\) 555-1212](#) phone number to call the person back.
- c. Click the  phone handset icon to call to play the message.
- d. Click the  right arrow to forward the message to another user.
- e. Click the  down arrow to download the message to your computer.
- f. Click the  disc icon to save the message.
- g. Click the  X icon to delete the message.

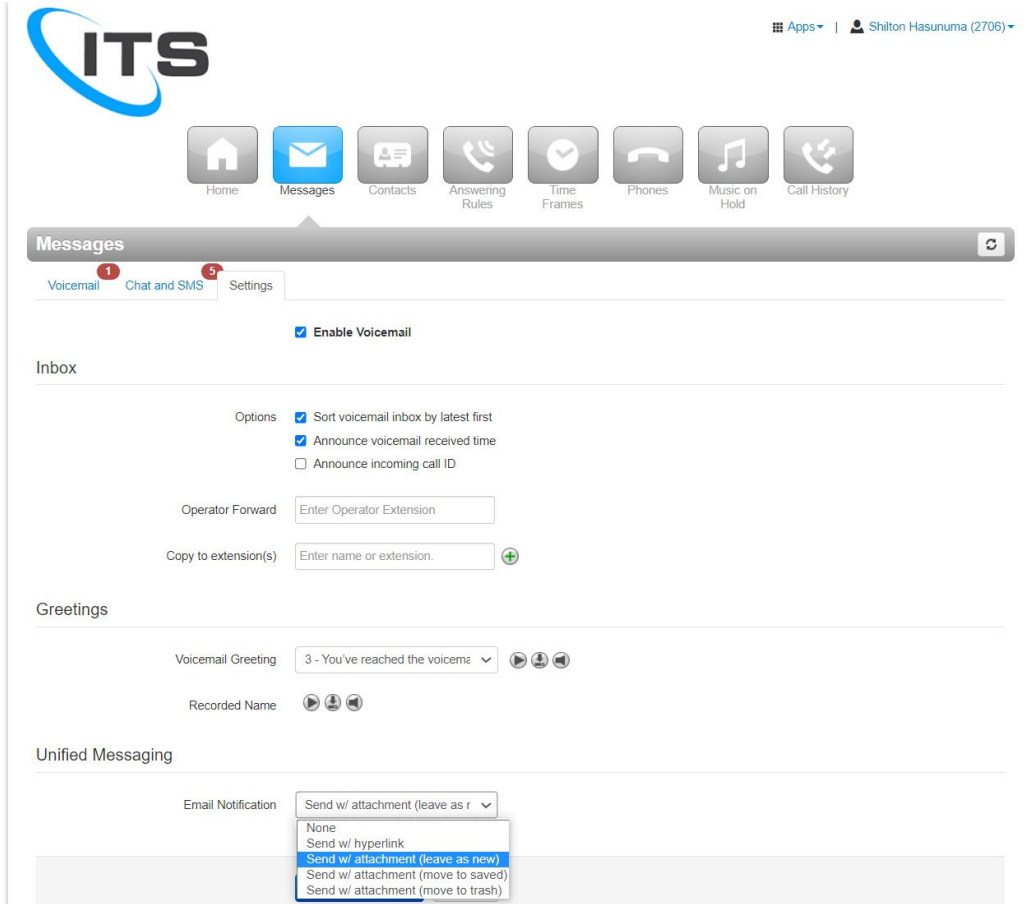
The **Chat and SMS tab** will display all of your Chat messages. From here, you can:

- a. Click the  message icon and it will display the Chat conversation.
- b. Click the  button to start a new Chat conversation.

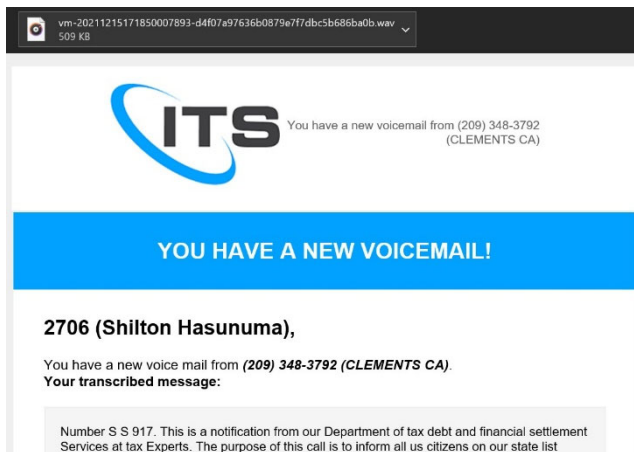


The **Settings tab** is where you can set up your voicemail. Here you can manage your:

- a. **Inbox** - choose how messages are sorted, and if you want to have the time received and caller ID announced. You can also establish if you want voicemails to be copied to other extensions.
- b. **Greetings** - play, download and manage voicemail greetings and your recorded name.
- c. **Unified Messaging** - establish how you would like voicemails to be forwarded to email and what should happen to the voice mail once it is forwarded.
- d. Be sure to **Save** your changes before you exit this window if you want the changes to stay.



If you choose to have your voicemail sent with attachment, when you receive a voicemail your phone will light up and you will also receive an email with the message that looks similar to the message below:



Contacts Screen

The Contacts screen allows you to easily see who is on a call, dial their extension or start a chat.

- Green dot indicates they are not on a call and are available.
- Red dot indicates they are on a call.
- Gray dot indicates they are off-line.

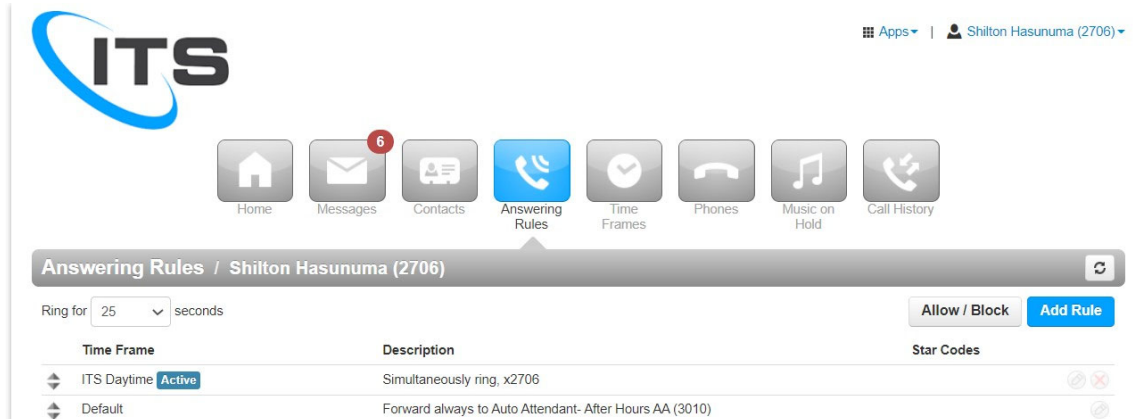
Name	Number(s)	Status	Department	Email
O2 Open 2717	2717			2717@itstelecom.com
H9 Hot Desk 1 900	900			900@mail.com
H9 Hot Desk 2 901	901			901@mail.com
Jeff Adams	(805) 435-2755, (805) 791-5542			
4A 4G Overage Alerts	2222		Technical Operations	technicaloperations@itstelecom.com
DA Danny Atwood	(805) 404-5602			danny.atwood@gmail.com
LA Lisa Atwood				
James Bayer	(805) 435-2705, (805) 991-2604			

If you select the dropdown located on the top left under the word Contacts you can narrow down who displays in this screen:

- All
- Favorites
- Shared
- My Contacts
- Coworkers
- Departments
- Sites
- Available
- Busy
- Offline

Answering Rules

The Answering Rules screen allows you to easily set up rules for how your calls are handled. The default rule is to ring your phone when there is an incoming call. To change or add the rule, click the Add Rule button on the top right.



After clicking the Add Rule button you will see the following:

Add an Answering Rule

Time Frame: Select a time frame
This is when your answering rule will apply

Enabled

Do not disturb

Call screening

Call Forwarding

Always: Extension, number or phone

On Active: Extension, number or phone

When busy: Extension, number or phone

When unanswered: Extension, number or phone

When offline: Extension, number or phone

Simultaneous ring

Include user's extension

Ring all user's phones

Answer confirmation for offnet numbers

Extension, number or phone [0] +

Just ring user's extension

To set up an Answering Rule

- a. Time Frame: Identifies the Time Frame the new Rule will apply to. When you select the dropdown, you will see a selection of valid time frames. Here is an example:

Add an Answering Rule

Time Frame g rule will apply

- Call screening

Call Forwarding

- Always
- On Active
- When busy
- When unanswered
- When offline

Simultaneous ring

- Include user's extension
- Ring all user's phones
- Answer confirmation for offnet numbers 0 +

Just ring user's extension

Cancel Save

- b. Select the actions you want to happen.
 - i. **Do not disturb** – all of your calls will go directly to voicemail.
 - ii. **Call screening** – when a new call comes in your caller will be informed that you would like to know who is calling and will ask them to record their name. Once they have recorded their name, your phone will ring and announce the caller. You will then have the option to accept the call or send it to voicemail.
 - iii. **Call Forwarding** section, you have the option of:
 1. **Always** – this option will Always forward your calls to the number you specify. This is useful for example when you are on vacation, you may want to always have your number forward to a co-worker.

2. *On-Active* - this option forwards your calls to the number you specify when your status is Active.
 3. *When Busy* - this option allows you to forward your calls to the number you specify rather than having the call go to voicemail.
 4. *When Unanswered* - this option allows you to forward your calls to the number you specify rather than having the call go to voicemail.
 5. *When Offline* - this option allows you to forward your calls to the number you specify rather than having the call go to voicemail.
 6. *Simultaneous Ring* - This option will forward your calls to all of the options you select and they will all ring at the same time:
 - a) Include users extension – when selected will ensure that your extension is also rung when a call comes in.
 - b) Ring all users phones – when selected will simultaneously ring all of your phones, this could be your desk phone, your cell phone, and a phone you have at a remote office.
 - c) Answer confirmation for other numbers – this option is used when you are forwarding your calls to a number outside of the system. You can also set up a ring delay to this number.
- c. **Just ring user's extension** – this is the default rule and simply rings your extension when there is an incoming call.

Allow/Block Numbers

The Allow/Block Numbers allows you to specify numbers you want to allow to ring your phone as well as numbers you want to block.



To set Numbers to be Allowed or Blocked

- a. Select the Allow/Block button.
- b. The following screen will pop up.
- c. Specify numbers that you want to allow or block in the appropriate column.
- d. Click the Done button to save the numbers.

Note this is a feature unique per user. A number that one user blocks will not be blocked for another user.

Allow / Block ×

ALLOWED NUMBERS

+

BLOCKED NUMBERS

+

Block anonymous or unknown

Done

Time Frames

The Time Frames screen allows you to easily set up time frames that are pertinent to your business and can be used in other areas of the system. In the example below you will see that we have set up time frames for After Hours, Holiday, ITS Daytime, and Special Occasions. The Time Frames that are defined in this screen are used in the Answering Rules screen and the Music on Hold screens allowing you to specify how calls and recordings are handled based on defined timeframes.

Apps ▾ | Shilton Hasunuma (2706) ▾

Home

Messages 6

Contacts

Answering Rules

Time Frames

Phones

Music on Hold

Call History

Time Frames
↻

Add Time Frame

Name	Description	Owner
3111 Fowarding	Specific Dates ⓘ	Shared
After Hours	Always ⓘ	Shared
Holiday	Specific Dates ⓘ	Shared
ITS Daytime	Days and Times ⓘ	Shared

If you select the Add Time Frame Button you can establish a new time frame for the system. Depending on which options you select, additional screens will open to allow you to drill down on the timeframe or dates that the time frame is applied to.

Note that when setting up a time frame, make sure you give it a name that will have meaning as once it is saved, you cannot change the name.

The image displays two sequential screenshots of the 'Add a Timeframe' dialog box. Both screenshots feature a title bar with the text 'Add a Timeframe' and a close button (X) in the top right corner.




The top screenshot shows the 'Name' field with an empty text box and a note: 'Note: Name cannot be changed'. Below this, the 'When' section has three radio button options: 'Always' (which is selected), 'Days of the week and times', and 'Specific dates or ranges'. At the bottom right, there are 'Cancel' and 'Save' buttons.

The bottom screenshot shows the same dialog box but with the 'Days of the week and times' option selected. Below the 'When' section, there are seven rows, one for each day of the week (Sunday through Saturday). Each row includes a checkbox on the left, a horizontal time range slider, and a green plus sign on the right. The time range sliders are set to start at 12:00 am and end at 11:59 pm, with intermediate markers at 6:00 am, 12:00 pm, and 6:00 pm. The 'Cancel' and 'Save' buttons are also present at the bottom right.

Add a Timeframe ✕

Name **Note:** Name cannot be changed

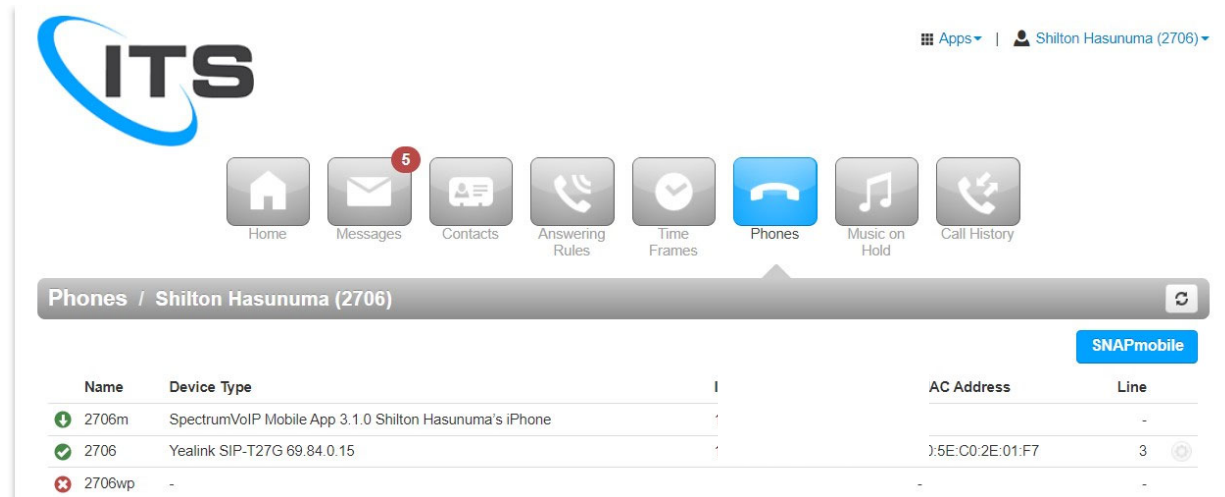
When Always Days of the week and times Specific dates or ranges

Specific dates or ranges  to  

If you want for example to set up a 2018 Holiday timeframe, you can add in all of the holidays by clicking the plus sign to the right of the Specific dates or range fields.

Phones

The Phones screen displays all of the phones, mobile apps and other devices that you have configured to receive calls on when your number is dialed. These devices will ring simultaneously and behave as your extension by default.



ITS Apps | Shilton Hasunuma (2706)

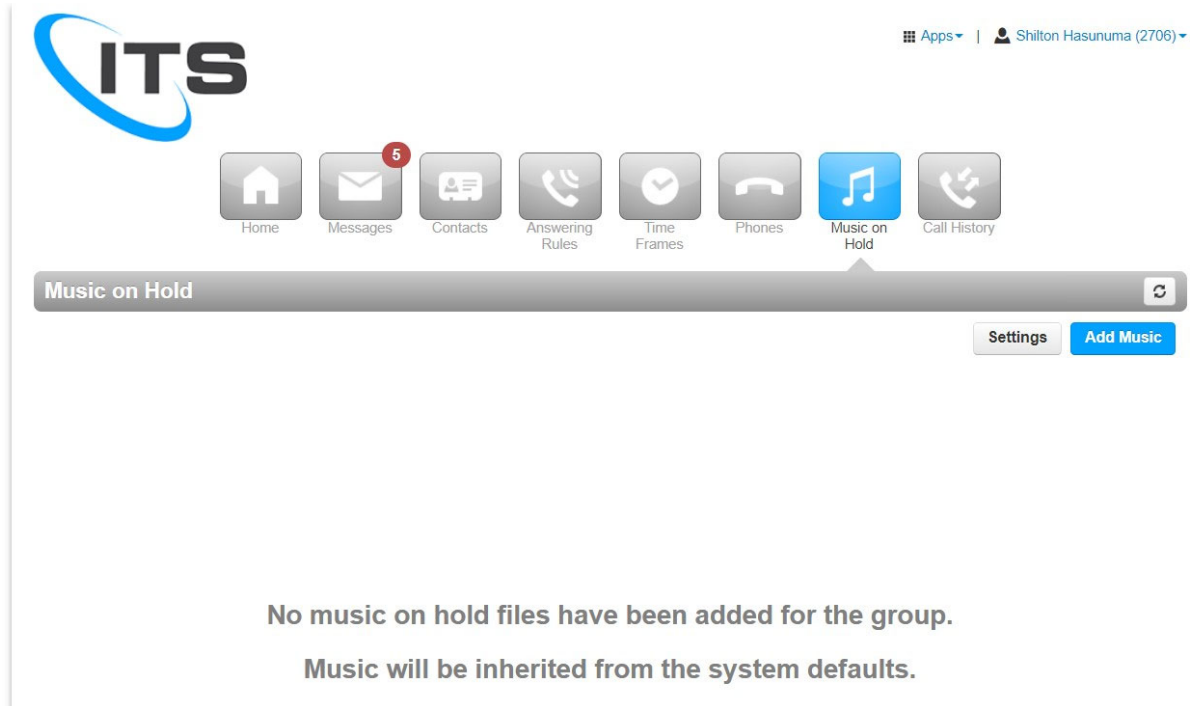
Home Messages (5) Contacts Answering Rules Time Frames **Phones** Music on Hold Call History

Phones / Shilton Hasunuma (2706) SNAPmobile

Name	Device Type	AC Address	Line
2706m	SpectrumVoIP Mobile App 3.1.0 Shilton Hasunuma's iPhone	-	-
2706	Yealink SIP-T27G 69.84.0.15	0:5E:C0:2E:01:F7	3
2706wp	-	-	-

Music on Hold

The Music on Hold screen allows you to set up music that will play when your calls are put on hold. This however is typically controlled by the system administrator because most businesses prefer to have consistent music or messaging played when anyone is put on hold.





The screenshot shows the ITS user interface. At the top left is the ITS logo. At the top right, there is a user profile for "Shilton Hasunuma (2706)". Below the logo is a navigation bar with icons for Home, Messages (with a red notification bubble containing the number 5), Contacts, Answering Rules, Time Frames, Phones, Music on Hold (highlighted in blue), and Call History. Below the navigation bar is a header for the "Music on Hold" section, which includes a refresh icon. To the right of the header are two buttons: "Settings" and "Add Music". The main content area of the screen displays the following text:

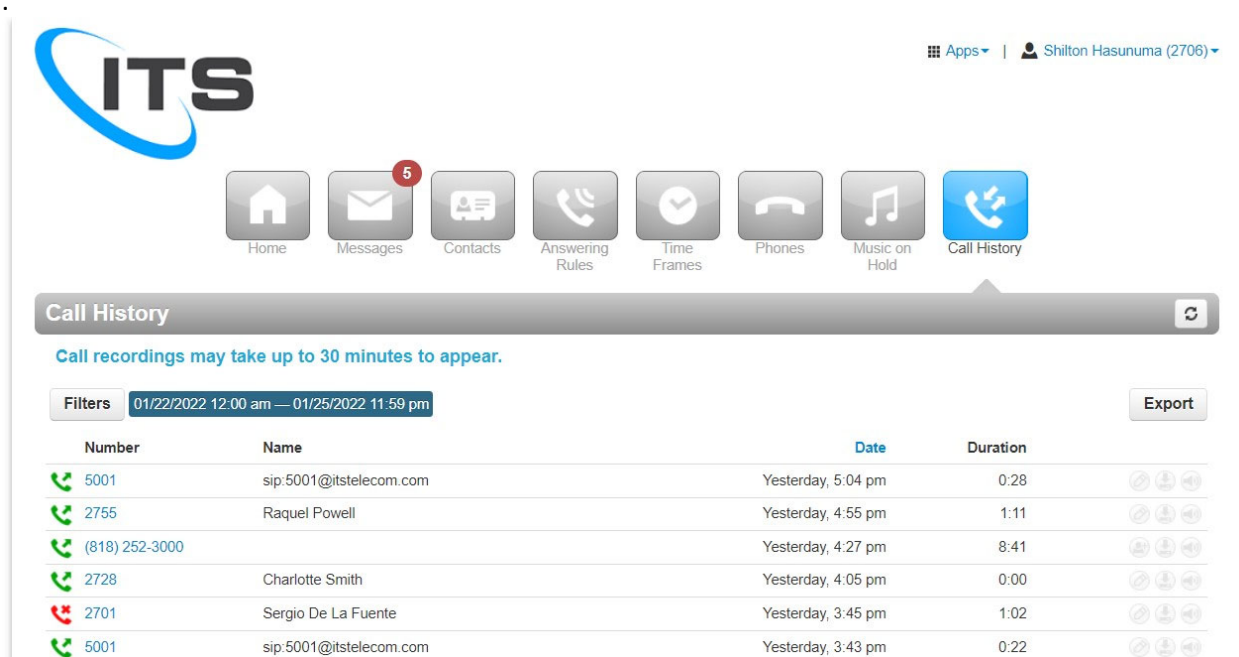
**No music on hold files have been added for the group.
Music will be inherited from the system defaults.**







Call History

The Call History screen displays all of the inbound and outbound calls that have come to your number. The color and icon shows how the call was handled.

-  Outgoing Call
-  Missed Call
-  Inbound Call


It also shows the phone number, Caller ID if available, Date, Time and Duration of call.




Number	Name	Date	Duration
 5001	sip:5001@itstelecom.com	Yesterday, 5:04 pm	0:28
 2755	Raquel Powell	Yesterday, 4:55 pm	1:11
 (818) 252-3000		Yesterday, 4:27 pm	8:41
 2728	Charlotte Smith	Yesterday, 4:05 pm	0:00
 2701	Sergio De La Fuente	Yesterday, 3:45 pm	1:02
 5001	sip:5001@itstelecom.com	Yesterday, 3:43 pm	0:22

If you select the [Filters](#) button, you can customize this list based on date range, caller number, dialed number or call type.

Call History Filters ×

From 

To 

Caller Number

Dialed Number

Call Type

You can also export to Excel whatever information you have displayed by selecting the Export button on the top right.