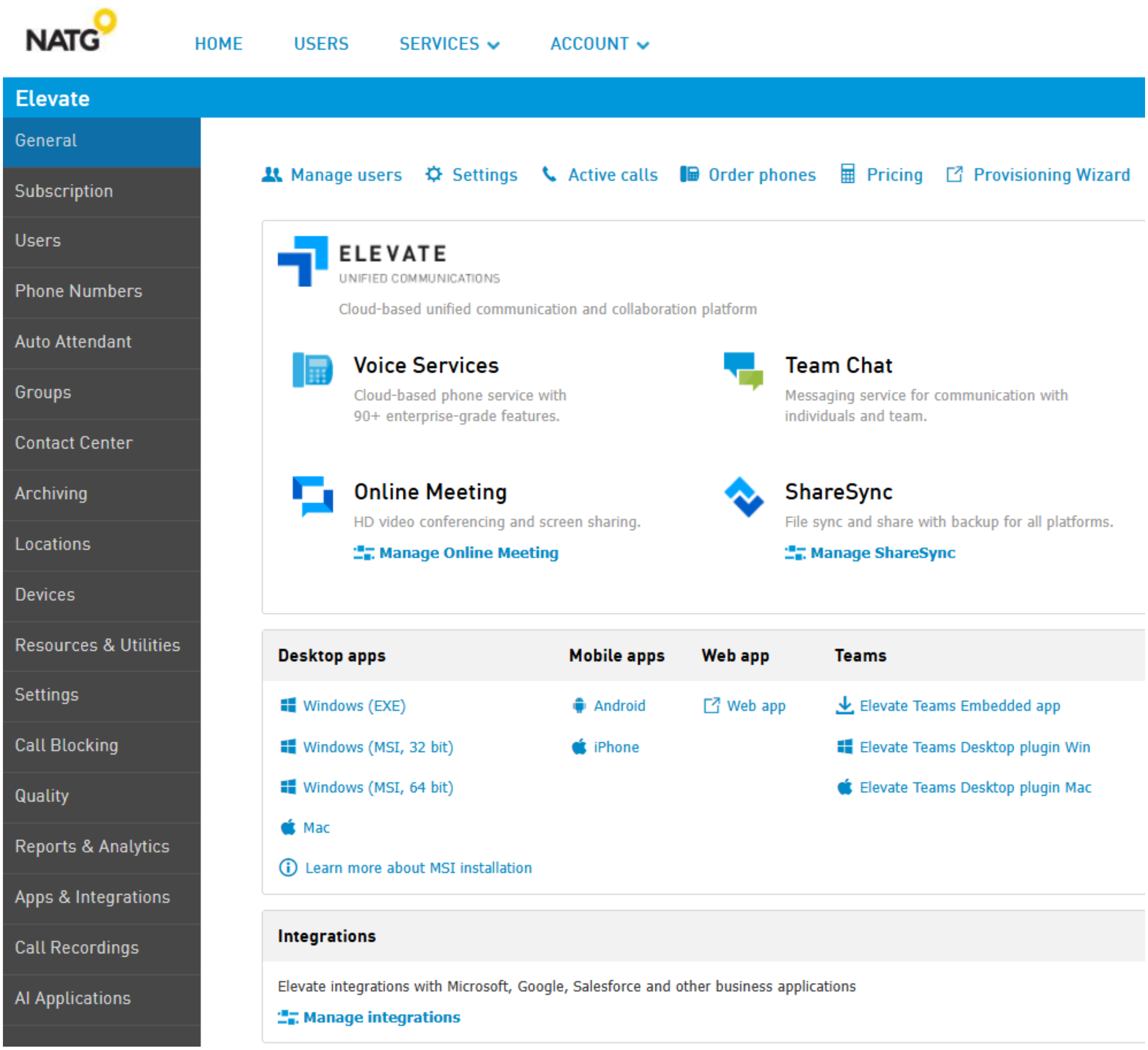
Control Panel Administration Guide



****Disclaimer:****
Please be advised that NATG is not responsible for any billing increases resulting from changes made by customers. If you are uncertain about making any changes, we strongly recommend contacting NATG for assistance. You can reach us at Service@natgisit.ca or by calling 604-856-9155. Our team is here to help ensure that any modifications are made correctly and efficiently.

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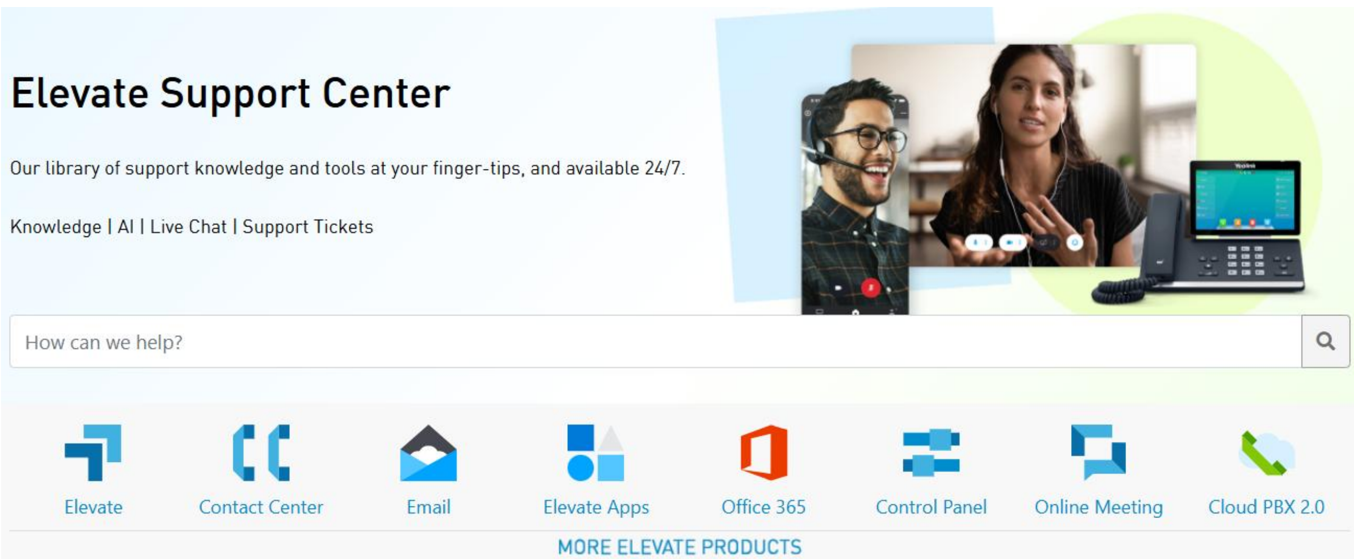
Logging In to Control Panel

1. Visit the Control Panel log in page: https://cp.serverdata.net/Portal/user/Login (recommend bookmarking this link)
2. Enter your email (must have admin rights)
3. Enter default password: **[as provided by NATG]**
   Note: If you forget your password, click "Forgot Password" and follow the prompts
4. Click 

5. If this is your first time logging in, you will then go through the security questions

Elevate Knowledge Base

1. For additional user guides and how-to's, visit the Elevate Blue Knowledge base at https://support.serverdata.net/app/main

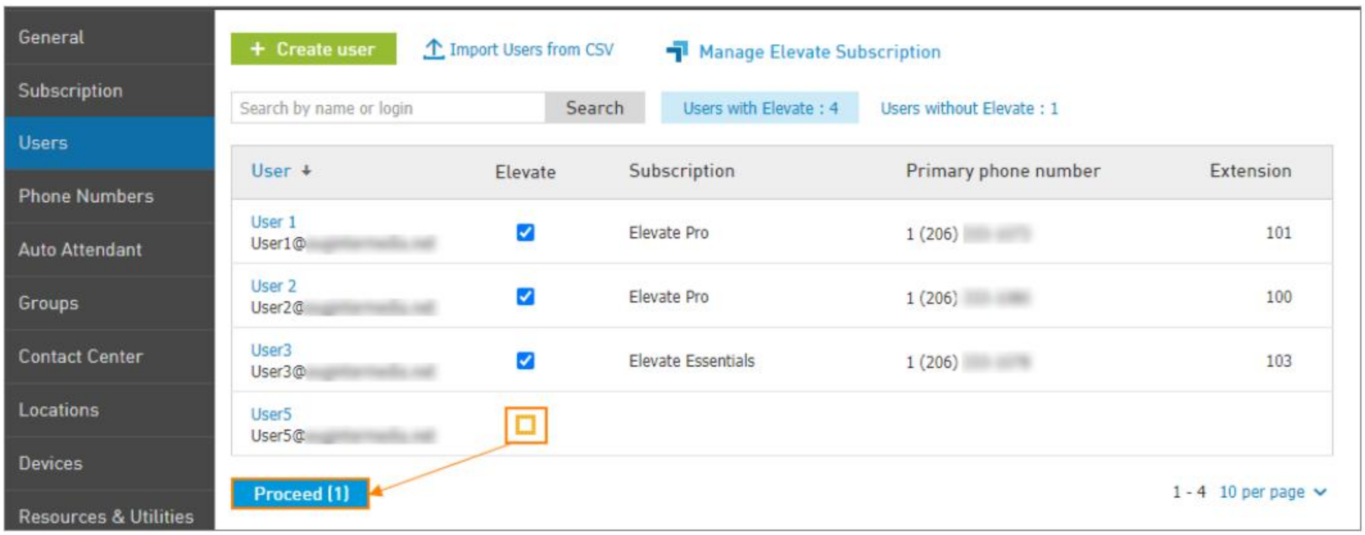


Deleting a User

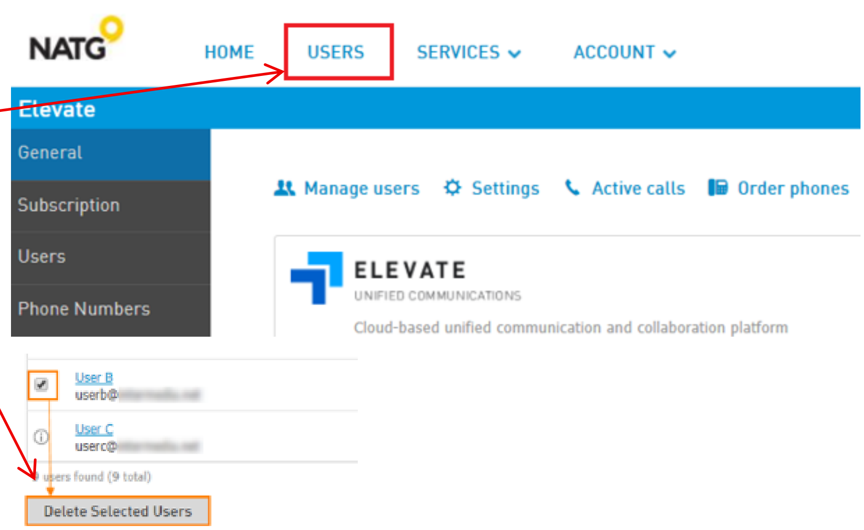
Important: When a Elevate service for a User account is disabled:

- Each of the user's phone numbers will be released and added to the account's number pool – additional number charges will apply unless the number is deleted or assigned to a new user.
- Each of the user's devices is unassigned and becomes available on the account – it's important to note the MAC address of the phone before disabling the user if you are reassigning it to someone else. The MAC Address can be found under the devices tab or by looking at the back of the phone.
- The user is removed from any Hunt Groups – if you're adding a new user to replace this person, you will need to add them to the hunt group.
- The user is removed from any Auto Attendants that included this user for forwarding calls – if you're adding a new user to replace this person, you will need to add them to the Auto Attendant.
- This will delete their voicemails, chat history, call history.

1. Log in to **Control Panel**
2. Select **ELEVATE**
3. On the left-hand side, select **Users**
4. Find the user you'd like to Delete, uncheck the box next to their name

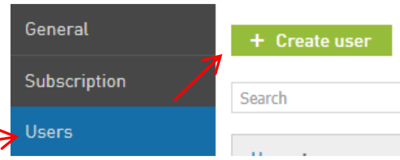


5. Click Proceed
6. Click Confirm
7. Click **Users** on the top of the Control Panel Home
8. Located the User(s) you deleted and check the box next to the user(s)
9. Click the **Delete Selected Users** button to remove them from the account completely.
10. If this step is not done, the user will still appear on the desktop an mobile app.

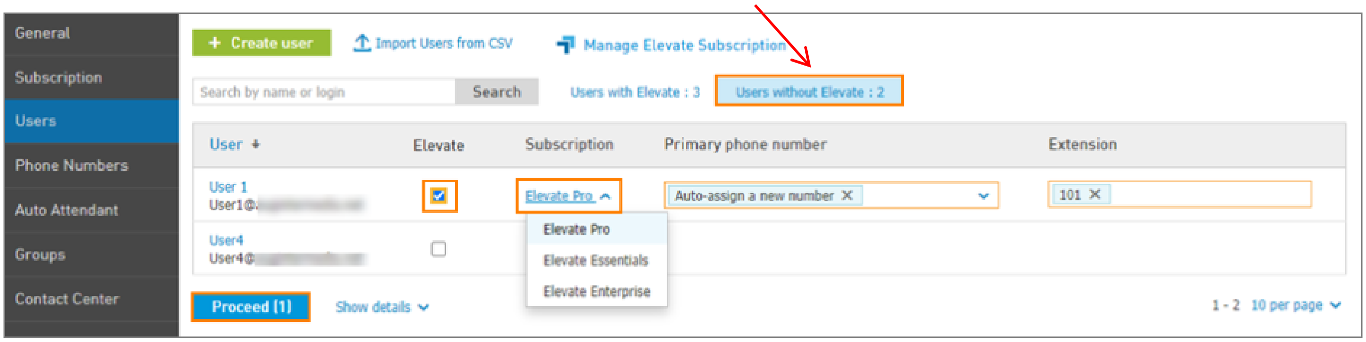


You can find more information able deleting and adding users here:
https://support.serverdata.net/app/articles/detail/a_id/17068#Disable

Creating a User



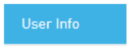
1. Log in to **Control Panel**
2. Select **ELEVATE**
3. On the left-hand side, select **Users**
4. Click **Create User**
5. Enter the user information
6. Click Create user
7. The user will be added to the "Users without Elevate". Click this tab

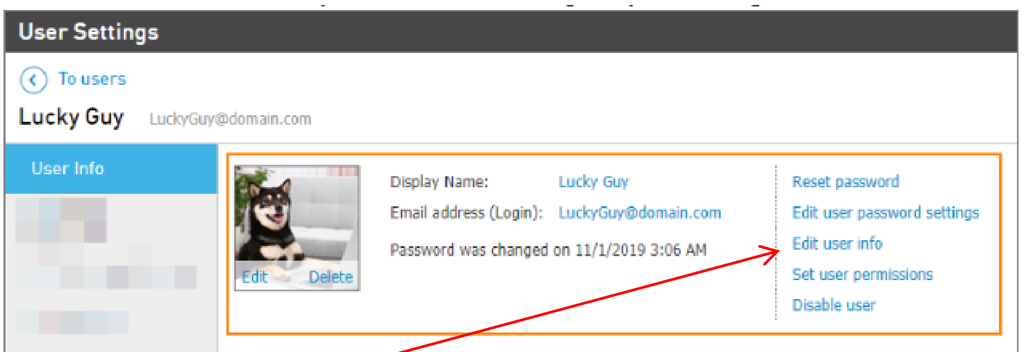


8. Click the check mark next to the user you created
9. Select the subscription you'd like to assign, which should match the subscription of the person you deleted. If you're unsure, you can find your available subscriptions under the Subscriptions tab. Important: If you do not have any available subscriptions, only add the number of subscriptions you need. For example, if you're adding one person, change the 0 to a 1. Do NOT enter the total number of licenses for the system, as adding a license will incur a charge. If you're unsure how to manage this, please contact NATG.
10. Click the dropdown under the phone number and select their direct line. Note: If you are adding a new license, you'll also need to add a new phone number. This can be done under the Phone Numbers tab. Remember, you are billed for any additional numbers, so only add the amount you need.
11. Enter the Extension number
12. Click Proceed

You can find more information able deleting and adding users here:
https://support.serverdata.net/app/articles/detail/a_id/17068#Disable

Changing the Name of Phones

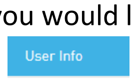
1. Log in to **Control Panel**
2. Select **ELEVATE**
3. On the left-hand side, select **Users**
4. **Select** the **user** you would like **to change** the name of
5. Select **User Info** 

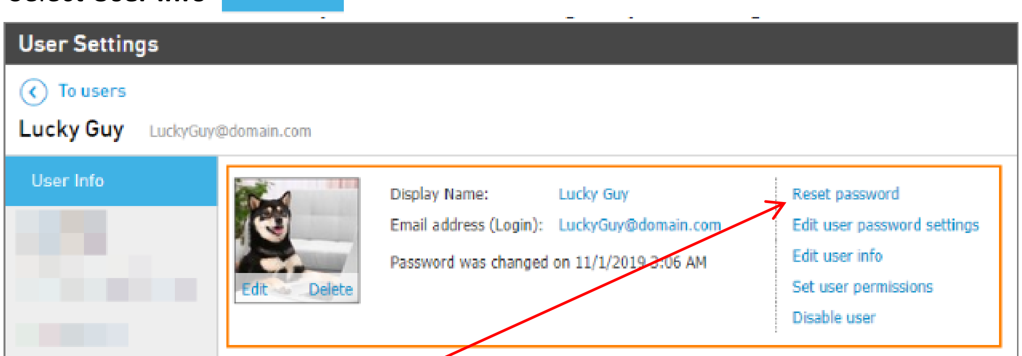


6. Select **Edit User Info**
7. In the **Display Name** slot, **enter** the **new name**
8. Click **Save Changes**

NOTE: Changing the name of the phone does not reset their Connect application, this simply changes their name. This means: their chat history, call history, voicemails, etc.. will all be there when you assign this to the new user. To default the programming, the user must be deleted and then re-added and it's recommended that NATG do this for you.

Resetting User's Desktop/Mobile App login password

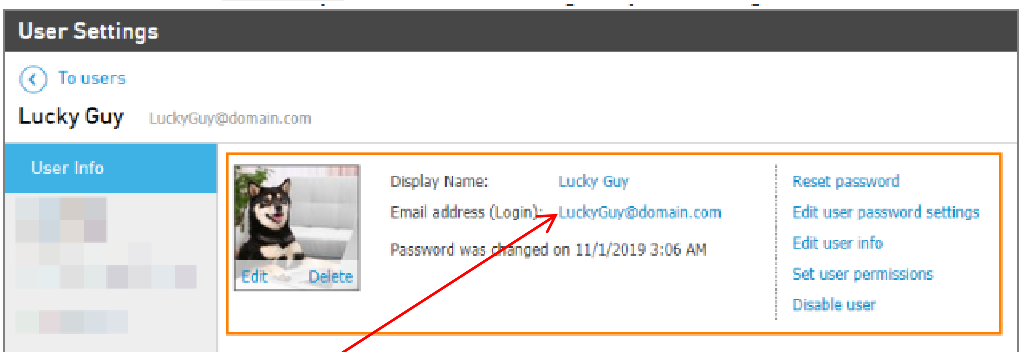
1. Log in to Control Panel
2. Select ELEVATE
3. On the left-hand side, select **Users**
4. **Select** the **user** you would like **to reset** the **log**in **password**
5. Select **User Info** 



6. Select the **Reset password**
7. **Enter** the **password** you would like to reset it to
8. Click **Reset Password**

Changing user Login (email address)

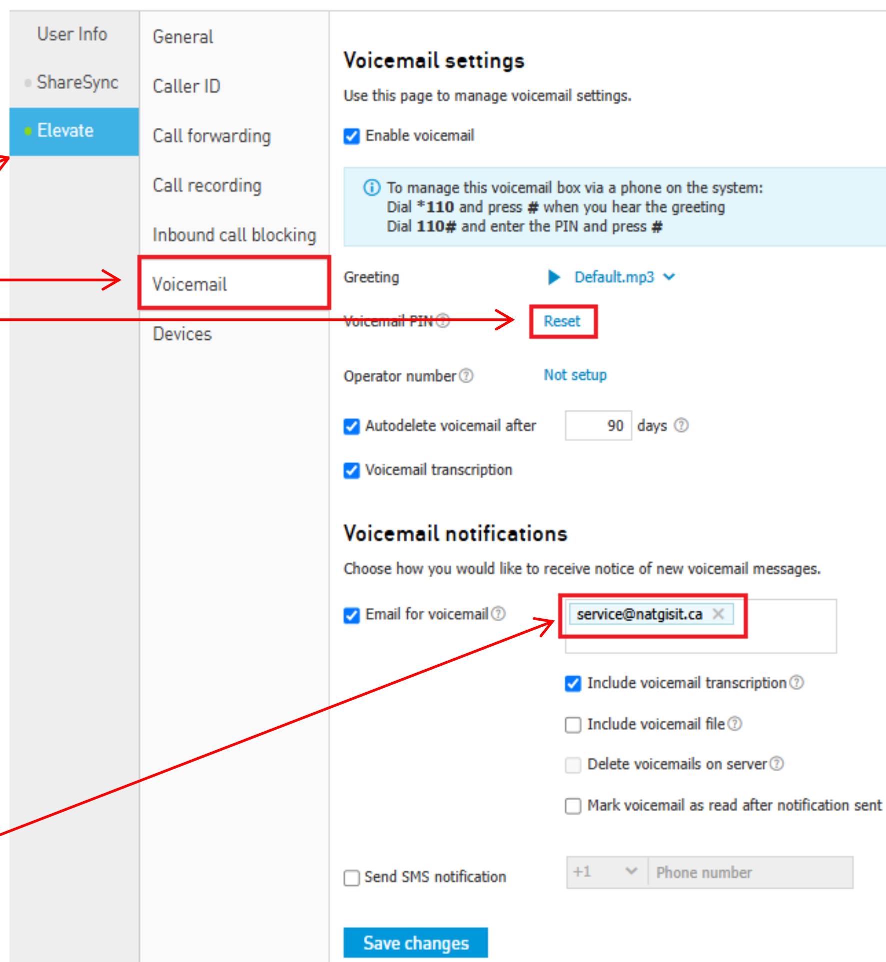
1. Log in to Control Panel
2. Select **ELEVATE**
3. On the left-hand side, select **Users**
4. **Select** the **user** you would like to change the **email address**
5. Select **User Info** User Info



6. Click the current email
7. **Enter** the **new email** address
8. Click **Save Changes**

Resetting Voicemail Password

1. Log in to Control Panel
2. Select **ELEVATE**
3. On the left-hand side, select **Users**
4. **Select** the **user** you would like to change
5. **Select** Elevate
6. **Select Voicemail**
7. Next to Voicemail PIN, click **Reset**
8. **Enter** the **PIN** you would like to reset it to
9. Click **Save Changes**



Changing Voicemail to Email Address

1. Log in to Control Panel
2. Select **ELEVATE**
3. On the left-hand side, select **Users**
4. **Select** the **user** you would like to change
5. **Select** Elevate
6. **Select Voicemail**
7. Under voicemail notifications, **enter** the **new email**
8. Click **Save Changes**

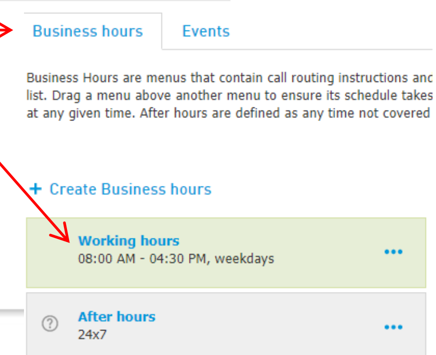
Recording/Uploading Company Greetings

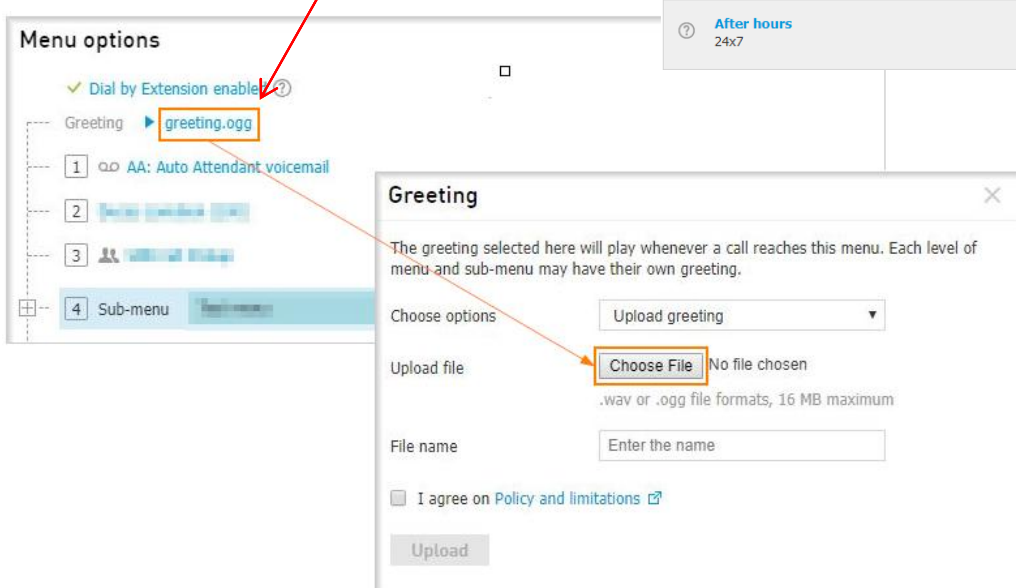
There are two ways to add a greeting for the Auto Attendant. (1) You can upload an already recorded sound file OR (2) record it through the phone

Recording and Uploading greetings from Control Panel:

1. **Record** and **save** your **greeting** using any **sound recording program** (through your computer or cell phone). We recommend downloading https://www.audacityteam.org/download/. The file must be in WAV or OGG format and cannot be larger than 16 MB.
2. Once recorded and saved in the above format,
3. Log in to the control panel
4. Select **ELEVATE**
5. On the left-hand side, Click **Auto Attendant**
6. **Select** the **Auto Attendant** you would like to change (typically "Main auto-attendant" unless you have multiple companies)

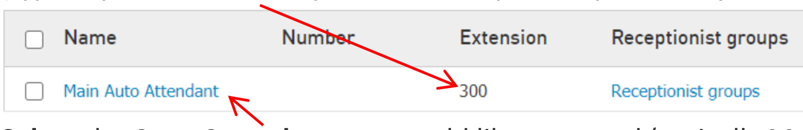
7. Select **Business Hours**
8. **Select** the **menu** you wish **to change** the greeting for (Working hours/After hours).
9. Under the menu options, **click** on the **current greeting** name
10. Select **choose file**, and **select** the **recording**
11. Enter a **file name**
12. **Agree with policies** and limitations
13. Click **Upload**.

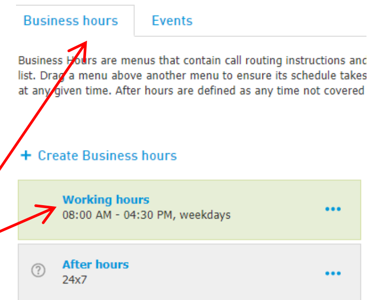




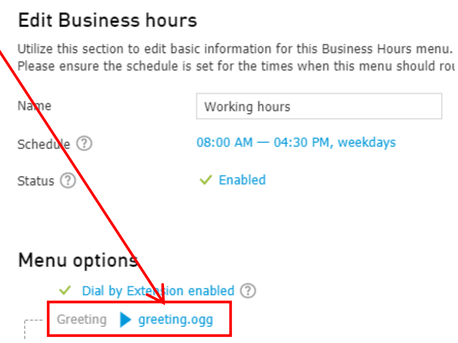
Recording Greetings through phone:

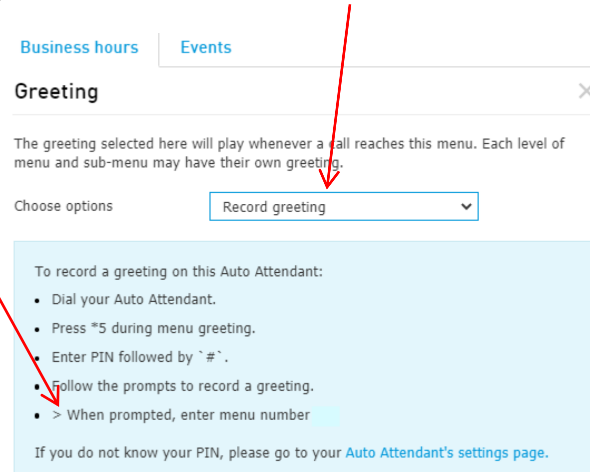
1. Log in to the control panel
2. Select **ELEVATE**
3. On the left-hand side, Click **Auto Attendant**
4. Make note of what extension number is being used for the auto attendant you would like to record (typically, it's 300 unless you have multiple companies or your extensions are 300 series)





5. **Select** the **Auto Attendant** you would like to record (typically Main Auto Attendant unless you have multiple companies)
6. Select **Business Hours** or **Events**
7. **Select** the **menu** you would like **to change** the greeting for (Working hours/After hours).
8. Under the menu options, **click** on the **current greeting** name
9. Beside Choose options, click the drop-down and select Record greeting
10. You will be given the instructions for recording the greeting through the phone:
    a. Dial Auto Attendant (the number you made note of in step 4 (typically 300))
    b. When the message plays, Press *5
    c. Enter PIN (found in settings), followed by #
    d. Follow the prompts
    e. When prompted, enter the menu number you would like to record. This will be listed in these instructions



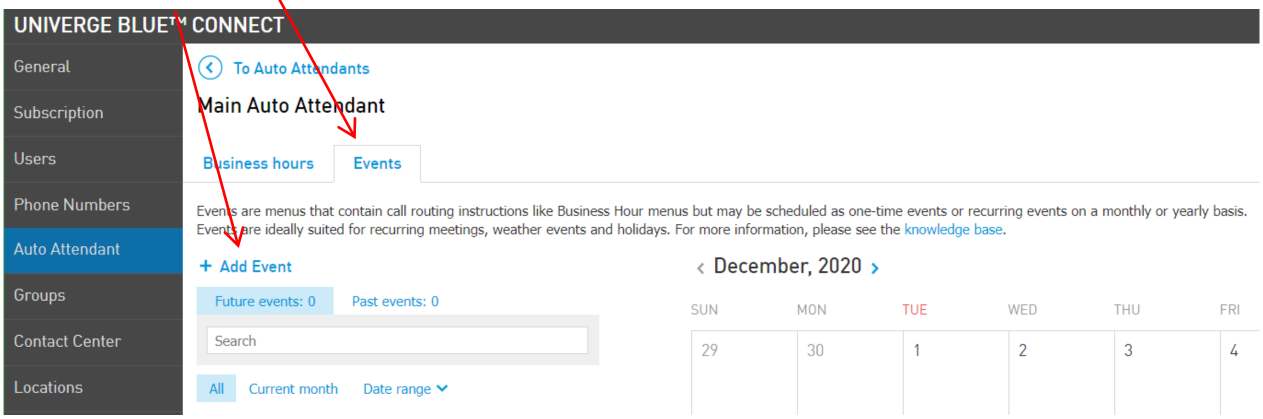


Creating Holiday/Closure Events:

1. Log in to the control panel
2. Select **ELEVATE**
3. On the left-hand side, Click **Auto Attendant**
4. Select the Auto Attendant you would like to change (typically "Main auto-attendant" unless you have multiple companies)

Name	Number	Extension	Receptionist groups	Call routing override
Main Auto Attendant		300	Receptionist groups	Disabled

5. Click **Events**
6. Click on **Add Event**



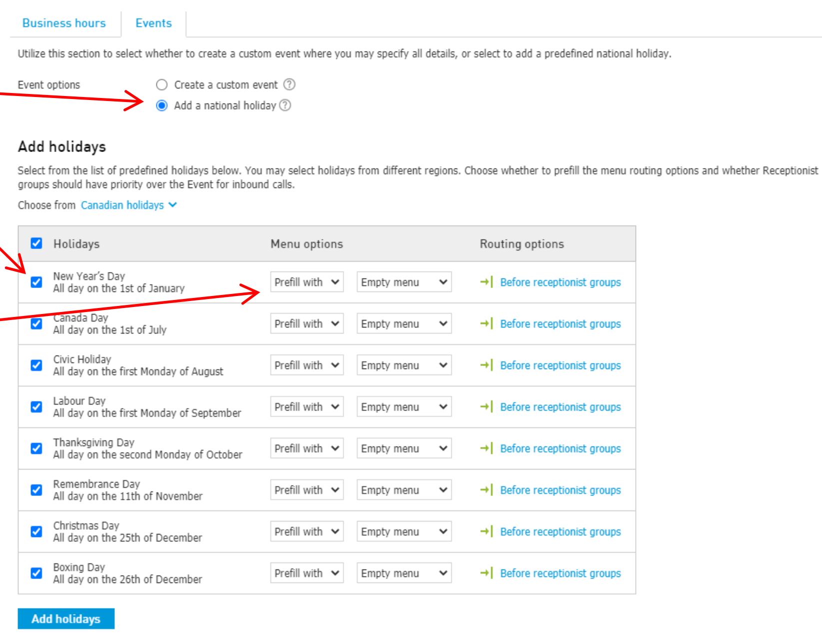
7. Here you can choose between **Adding a National Holiday** or **Create a custom event**

   a. **Add a National Holiday** gives you a quick choice of pre-determined dates.

      i. Select **Add a national holiday**

      ii. Select which National Holidays you would like to schedule

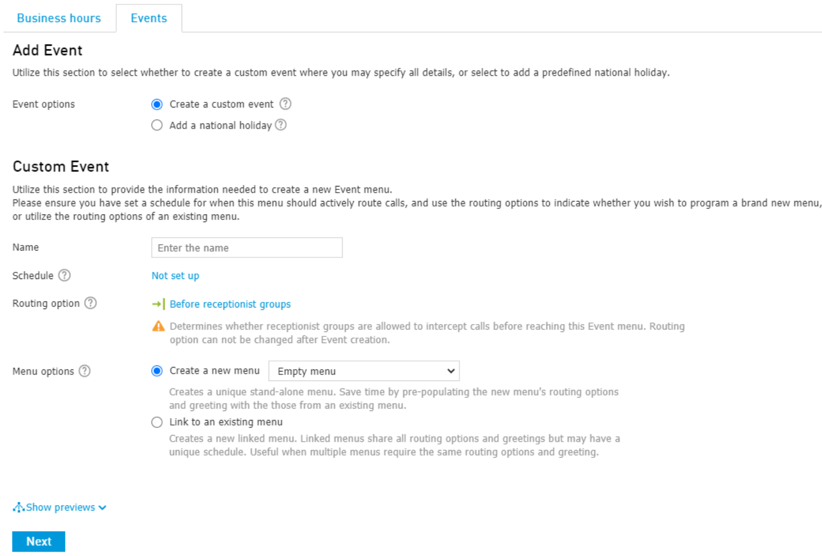
      iii. Under Menu options, select whether you would like to **Prefill** - Creates a unique stand-alone menu. Save time by pre-populating the new menu's routing options and greeting with those from an existing menu. This would be used if you would like a custom greeting like "we are currently closed for the "Christmas" holiday" **OR** **Link to** an existing menu - Linked menus share all routing options and greetings but may have a unique schedule. Useful when you would like your after-hours message to play during this event.



      iv. Click **Add holidays**

      v. You will now see the created event. If you have chosen to "Prefill the menu" you will need to upload a greeting. See Recording and Uploading Greetings for instructions.

b. **Create a custom event** that allows you to set up your own events (ex. Staff events, extra date closures for Christmas, etc.)



i. Select **Create a custom event**

ii. Enter the event name

iii. Next to Schedule, select Not set up

iv. You will receive a new pop up, Enter the date

v. Select if you would like the event to play all day or during a specific time (ex. 12pm – 5pm)

vi. Click Save Changes or Cancel

vii. Beside Menu options, select whether you would like to: **Create a new menu** - Creates a unique stand-alone menu. Save time by pre-populating the new menu's routing options and greeting with those from an existing menu. This would be used if you would like a custom greeting like "we are currently closed for the "Christmas" holiday"
OR **Link to an existing menu** - Linked menus share all routing options and greetings but may have a unique schedule. Useful when you would like your after-hours message to play during this event.

viii. Click **Next**

i. You will now see the created event. If you have chosen to "Create a new menu" you will need to upload a greeting. See Recording and Uploading Greetings for instructions.

Once the Event is created, it will automatically override the usual schedule during the specified timeframe. Events will always be prioritized over the usual Menus. For receptionist groups, there is a specific setting called **Routing Option**. You can choose whether to set the Events before or after the Receptionist group. It can be found under the settings of a specific event.

NOTE: If the Event is set before the Receptionist group, inbound calls are routed directly to the menu and are further routed depending on the Timeout settings of the Event;

If the Event is set after the receptionist group, inbound calls first go to the receptionist groups according to the usual schedule and then go to the Event.

Important note for Stat holidays:

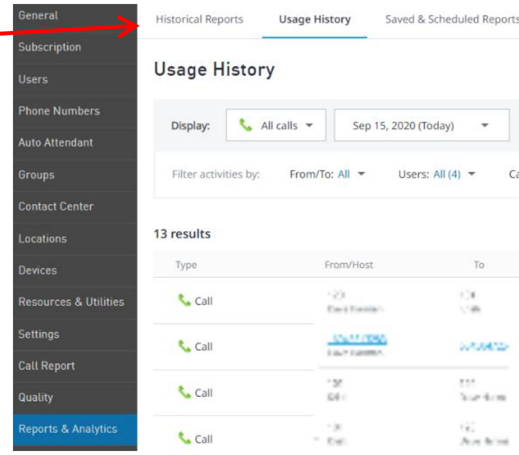
There are some missing stat holidays when you "add national holidays." These are:

1. Family Day
2. Victoria Day
3. Good Friday
4. Truth & Reconciliation Day

All except Good Friday can be created as a reoccurring holiday. Please make a reminder in your calendar to add Good Friday each year.

Running Reports

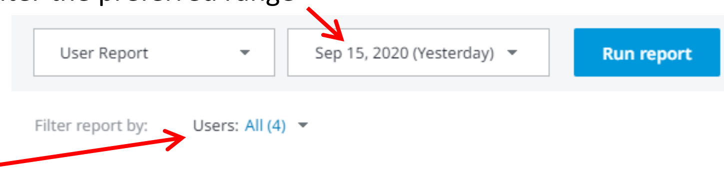
1. Log in to the control panel
2. Select **ELEVATE**
3. On the left-hand side, select Reports & Analytics
4. Select the type of report you would like to view
   a. Historical Reports - Includes **User** reports with an ability to choose the following relative periods or select a custom range.
   b. Usage History - The usage History tab allows you to create a specified call report by applying filters such as: From/To, Users, Call attributes, Date range, etc...
   c. Saved & Searched Reports - This section will include your saved reports



Historical Reports

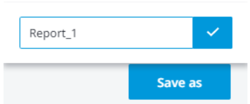
Includes User reports with an ability to choose the following relative periods or a custom range.

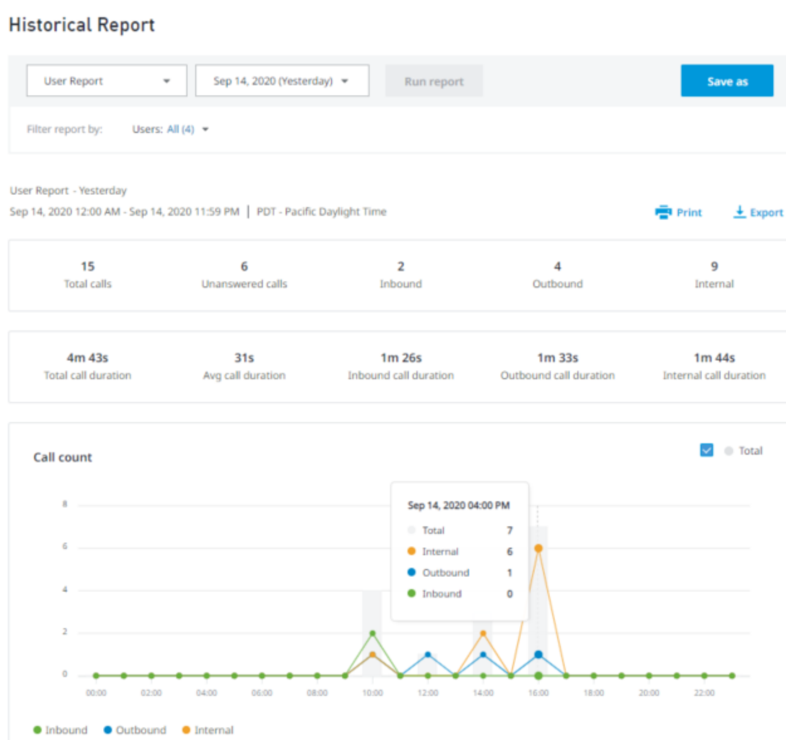
- Select Historical Reports
- Select the dropdown for the date range and enter the preferred range
- Click Run report



- The report will initially include all users by default, you can change the selection by using the **Users filter** and select the name(s) you would like to run the report on
- This report includes the number and duration of the following types of calls:

  Total calls / Unanswered / Inbound / Outbound / Internal
- Each report can be saved by clicking Save as button in the right upper corner (after the report is run). After you name the report it will appear in the Saved & Scheduled Reports section.

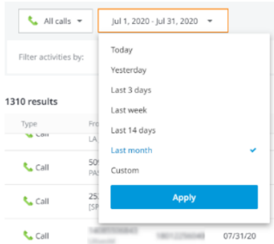




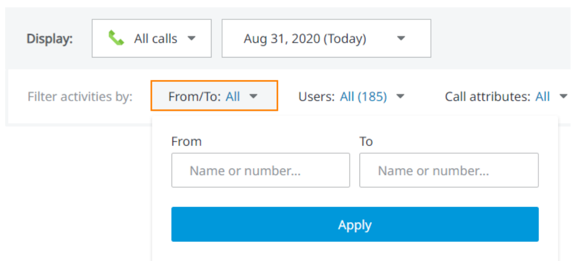
Usage History

The usage History tab allows you to create a specified call report by applying filters as such:
Type; From/Host; To; Date; Start Time; Duration; Group — the Hunt Group (if any) through which the user has received the call; Direction — internal or external call

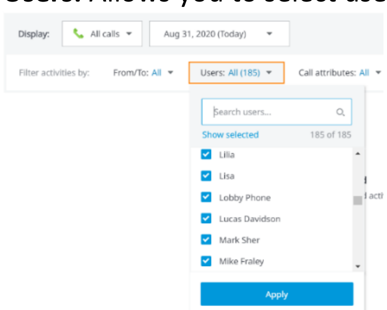
- **Select Date or a date range**;



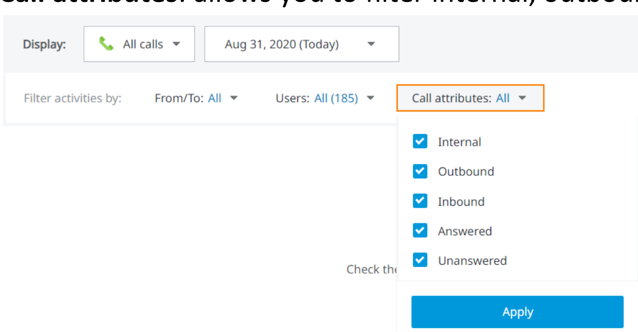
- **From/To**: allows you to input a name or number of a caller or a callee;



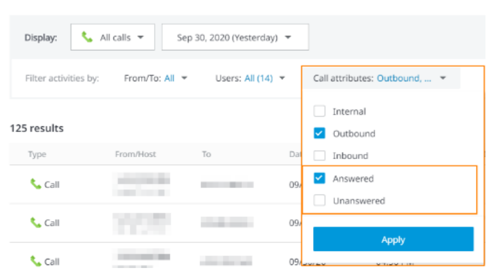
- **Users:** Allows you to select users who have received or made a call;



- **Call attributes**: allows you to filter internal, outbound, inbound, answered, and unanswered calls;



- Important: Internal, outbound, and inbound attributes cannot be selected on their own. Either Answered or Unanswered needs to be selected as well. Selecting All in Call attributes will show no results



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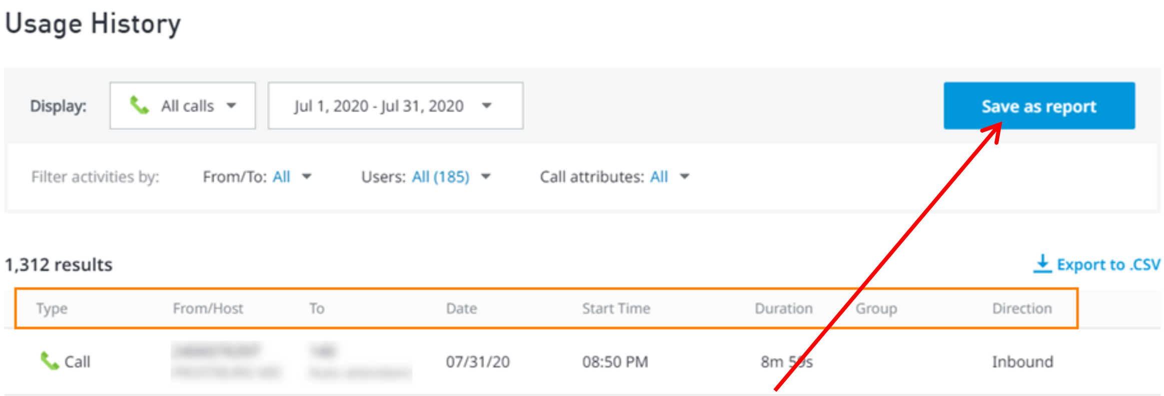
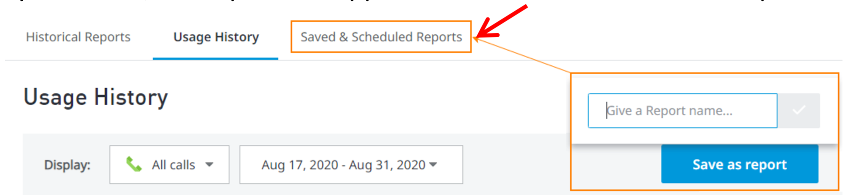
- Your report will then be generated



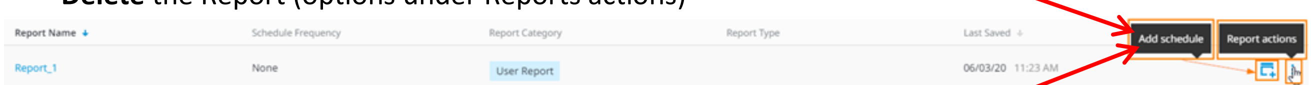
- Once the report is created, you can save it by clicking **Save as report** button and choosing the name of the report. After you save it, the report will appear in the *Saved & Scheduled Reports* tab.



Saved & Scheduled Reports

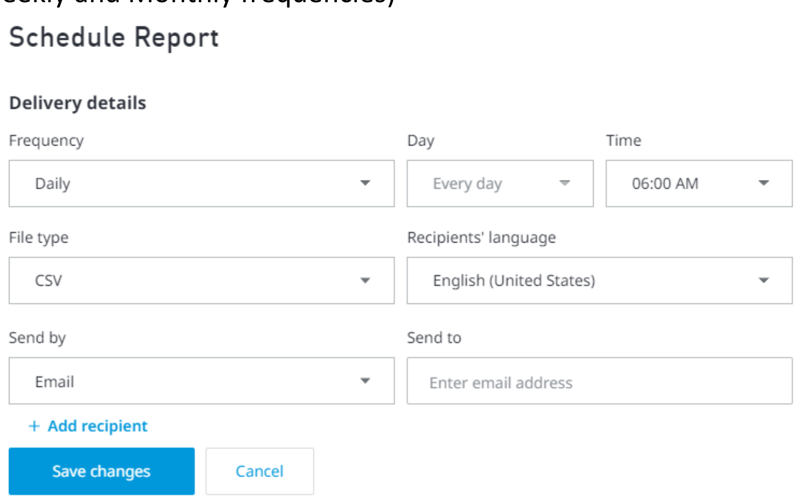
This section will include your saved reports.

- You can **view** the report by **clicking** its **name**.
- For each report, you can **Add** a **Schedule** (to send it automatically to an email), **Edit** the **name**, or **Delete** the Report (options under Reports actions)



- When you click **Add Schedule**, you should specify the delivery details:
  - Frequency: Daily, Weekly, or Monthly
  - Day (only available for Weekly and Monthly frequencies)
  - Time
  - Email address(es)

- After you saved the Schedule for the report, you can **Edit** or **Remove** it (options under **Schedule actions**).



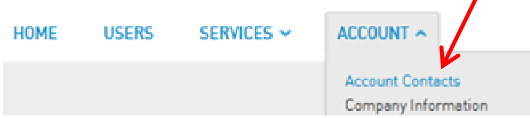
Adding users to the Control Panel login

1. Log in to Control Panel
2. Navigate to *Account > Account Contacts*

3. Click **+ Create account contact**
4. Fill in the information
5. Select the Roles you would like the employee to have access to
6. Click **Create contact**

Resetting Control Panel login password

1. Log in to Control Panel
2. Navigate to *Account > Account Contacts*



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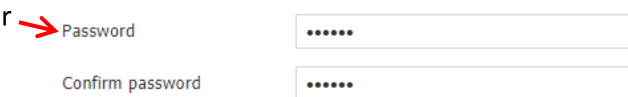
3. Click on the **Contact Name** of the Administrator you would like to reset the password for.
4. Under the **General** tab, navigate to Password and enter a new password. You may also generate the password automatically.



5. Select Reset password at next login to have employee enter their password on their next login
6. Click **Save changes**

Disclaimer:
Please be advised that NATG is not responsible for any billing increases resulting from changes made by customers. If you are uncertain about making any changes, we strongly recommend contacting NATG for assistance. You can reach us at Service@natgisit.ca or by calling 604-856-9155. Our team is here to help ensure that any modifications are made correctly and efficiently.