# Admin Portal User's Manual

Version 4.0

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# Table of Contents

# Chapter 1: Overview

Before users can access the Administration website, they must receive their login credentials from their ALICE Receptionist sales representative.

The ALICE Receptionist Administration Web Portal (here after referred to as the Admin Portal) is used to manage the following information and content for the ALICE Receptionist System:

- Customer information including:
    - Users
    - Licenses
    - Locations
    - Directories
    - Organizations
    - Departments
    - Employees
        - Communications preferences
        - Title / Position
        - Photos
    - Reports

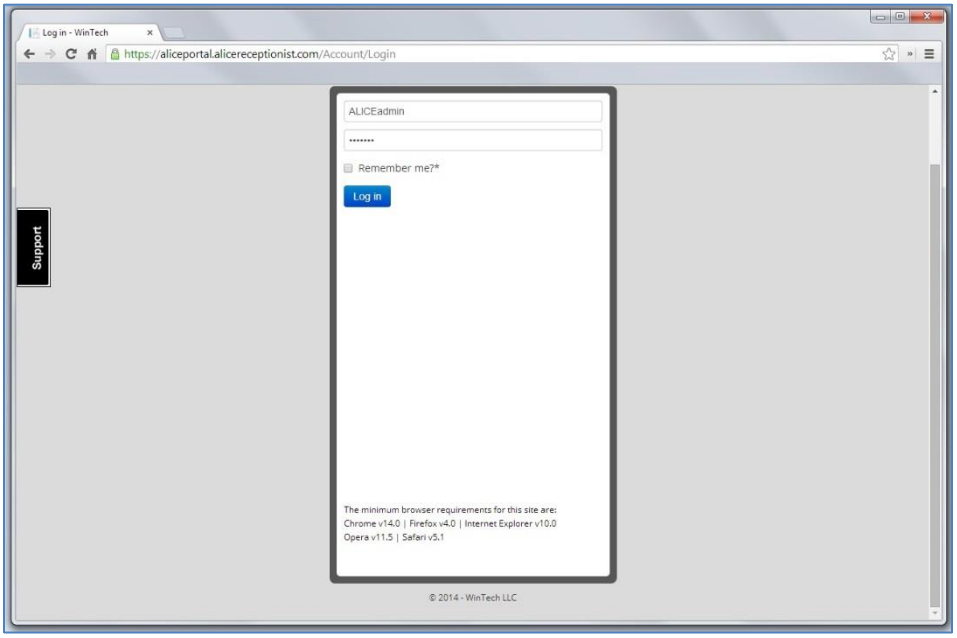
Content administration for the ALICE Directory (Directory) is performed using the ALICE Admin Portal. In addition, customers can find documentation, manuals, software downloads and additional information on the Admin Portal, which is available only to ALICE Receptionist customers.

The Admin Portal is optimized for Google Chrome and Internet Explorer browsers.

# Chapter 2: Login

To log in to the ALICE Admin Portal website, type the following address into your internet browser address bar:

http://admin.AliceReceptionist.com

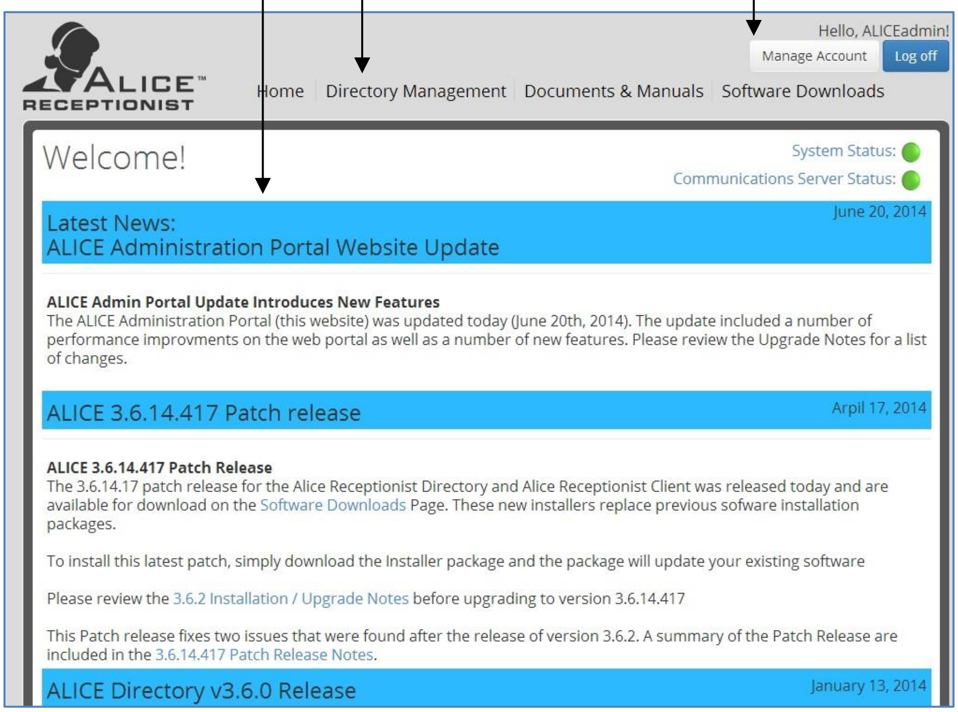



Enter your assigned User Name and Password and click the **Log In** button.

# Chapter 3: Portal Home Page

The Admin Portal Site Homepage consists of:

- A Manage Account button and a Logout link
- Navigation tabs
- A main content area

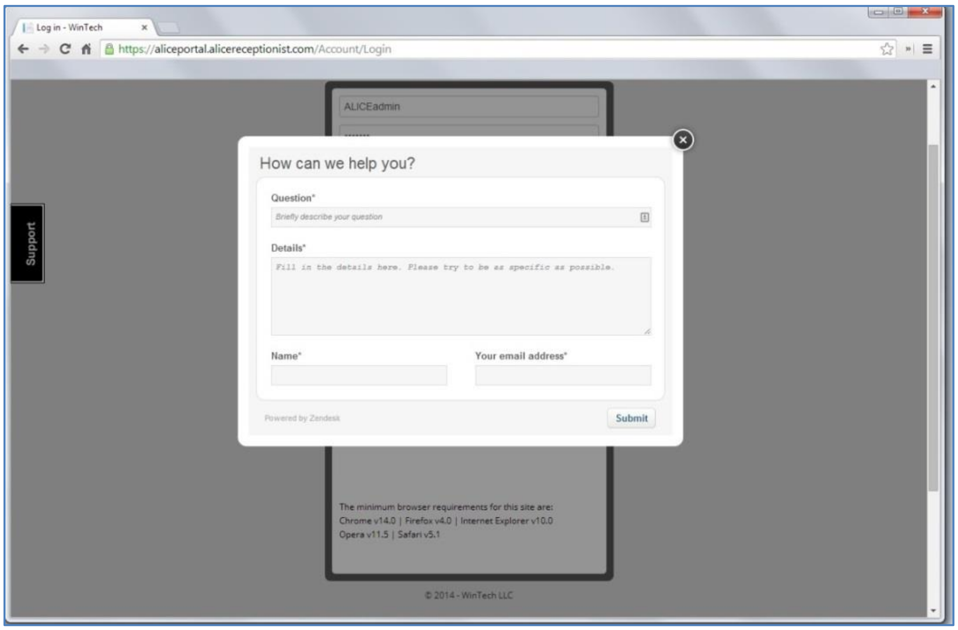



The Navigation Panel consists of four (4) menu items:

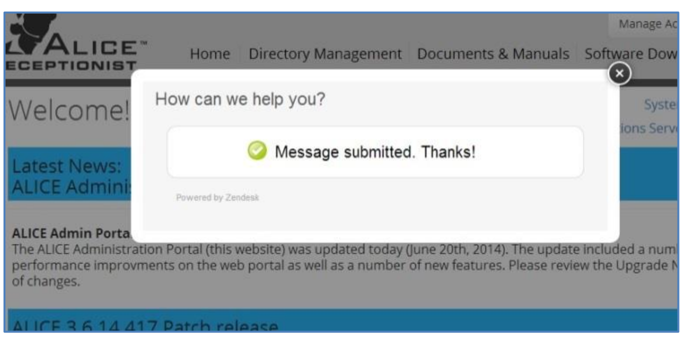
- **Home**— Latest news and product information for customers
- **Directory Management**—Where customers manage their customer data
- **Documents & Manuals—**Documents available for download
- **Software Downloads**—Software packages available for download

## Support Tab

The Admin Portal Site offers a Support Tab on the left margin of every screen of the website, whether you are logged in or not. To send a message to the ALICE Support Team, click the **Support** Tab, and a dialog window will appear. You can exit out of the Support window without submitting a request by clicking the **x** at the right hand side of the window.

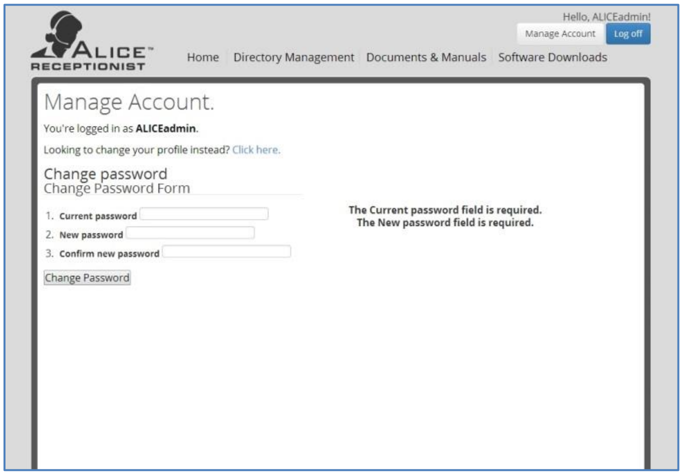



Fill in appropriate details regarding your support request and select **Submit** at the bottom right. You will see a confirmation window and you will receive a confirmation email. Click the **x** at the top right of the confirmation window to exit the support request process.

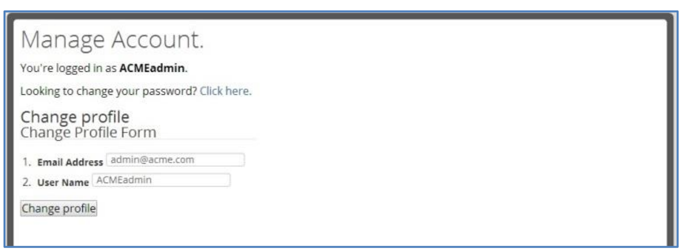


## Manage Account

To change your password, email address, or user name in the system, click on the **Manage Account** tab. Follow the instructions to change your password, and then click **Change Password**.




Or, click the link to change your profile, and follow the instructions to change your profile information. Then click **Change Profile**.




## Logging Off

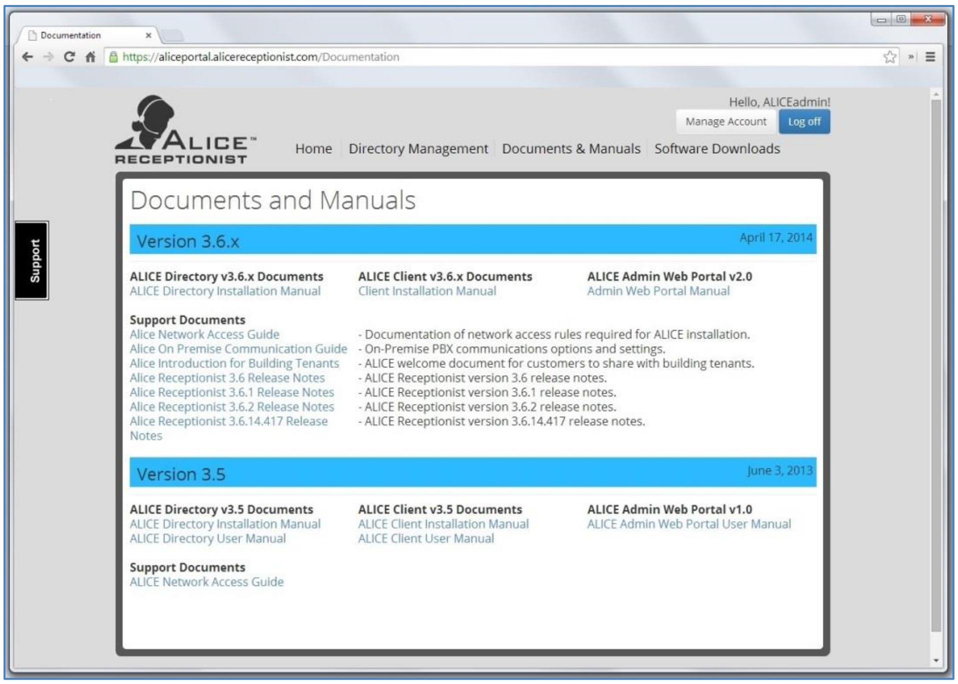
To Log off the Admin Portal, simply press the **Log Off** button in the top right hand corner of the site.

## Session Time Out

If the website is left idle for more than a few minutes, the browser session will time out for security purposes and the user will be required to log back in to continue using the Admin Portal.

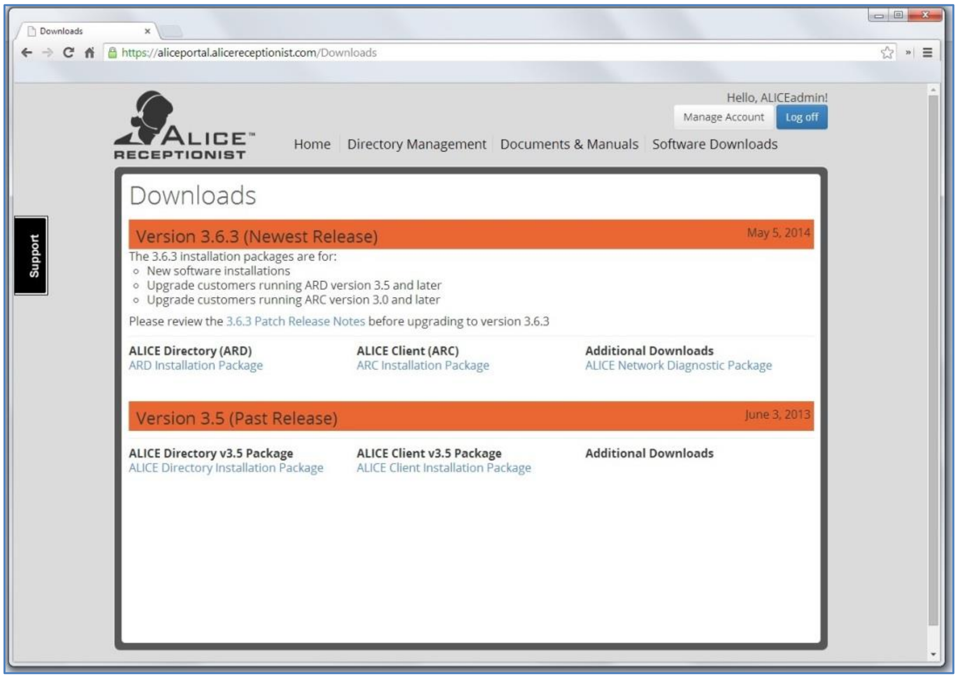
# Chapter 4: Documents & Manuals

The Documents & Manuals page contains available documents, manuals, guides and other files which can be downloaded by ALICE customers simply by clicking on the document links. Most documents can be viewed or downloaded in PDF format.



# Chapter 5: Software Downloads

The Software Downloads page contains available software packages and files for ALICE customers to download. These files will begin the download process when the user clicks on the file link. Depending on the user's browsers settings, they may be required to provide approval for the files to download.



# Chapter 6: Directory Management

The Directory Management area is where customers create and manage content which will display on their ALICE Directory.

## Admin Portal User Types

There are three classes of users for the Admin Portal: Admin users (Admin), Regular users (Users) and Report Viewer Users (Report Viewer). The Admin user has a slightly elevated permission level than a Regular user and Report Viewers only have access to the Reports tab.

**Report Viewer:** (Report Viewer) has access to the Reports Tab of the Directory Management screen, in addition to the Home and Documents & Manuals screens. They do not have access to any of the content management screens on the Directory Management screen.

**Regular User:** (User) has full access to all sections of the Directory Management screen with the exception of the Users tab. They have no access to manage other users within the system. They have full access to the Documents & Manuals and Software Download screens.

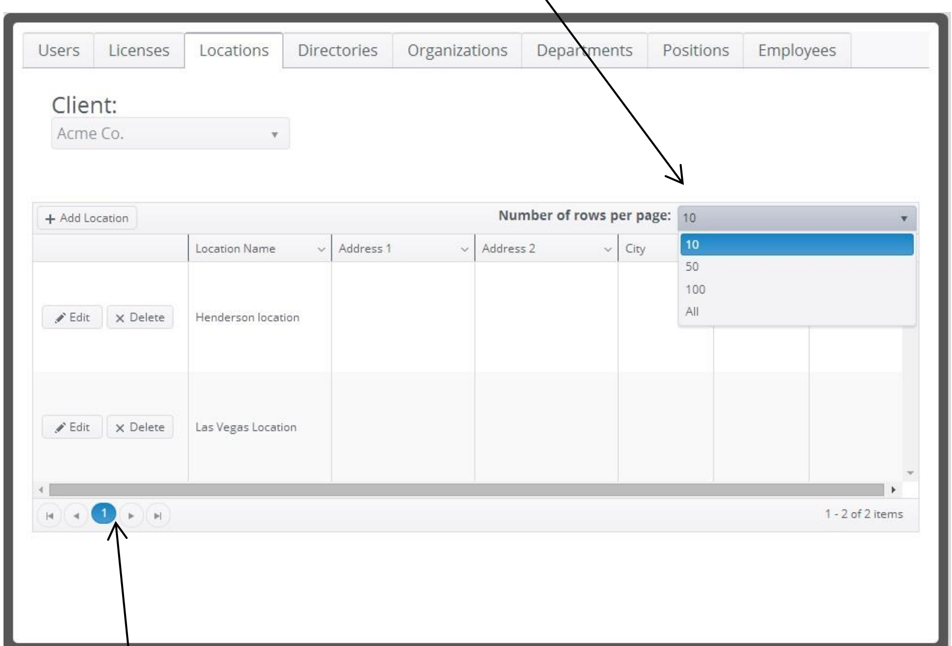
**Admin User:** An Admin User (Admin) can manage (create, modify, delete) other users for their System's ALICE Admin Portal account. In addition, they have full access to all sections of the Directory management area on the Admin Portal.

# Directory Management Tabs

## Grid Navigation

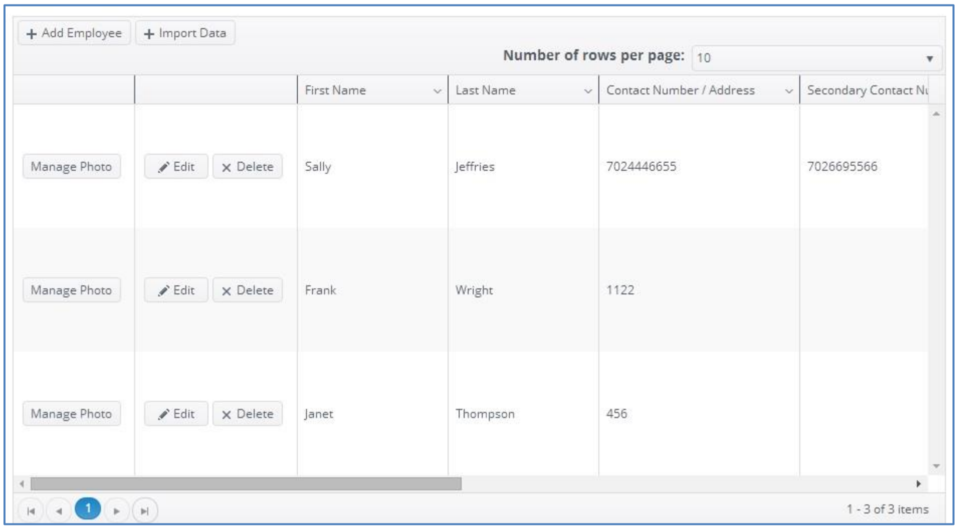
Each of the tabs in the Directory Management section provides access to manage different categories within your company. Navigating through this information will depend upon how many entries and how many fields are present.

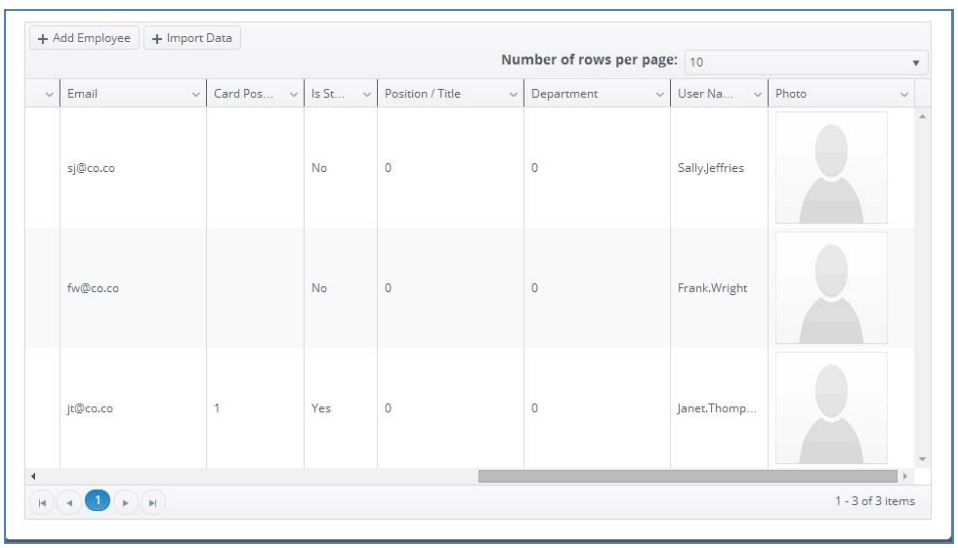
If you have more than 10, 50, or 100 entries in a category, you might choose to view them all at once rather than navigate from page to page to view the entries.




You can navigate from page to page by using the "Jump to Beginning", "Back One Page", "Forward One Page", or "Jump To End" buttons located next to the page numbers at the bottom of the grid.

Your grid can also be scrolled from side to side by using the slider bar at the bottom of the grid. For instance, the Employees grid has several fields which cannot be seen all in one view. In the example below, sliding the bar all the way to the right shows the rest of the fields available for Employee data.



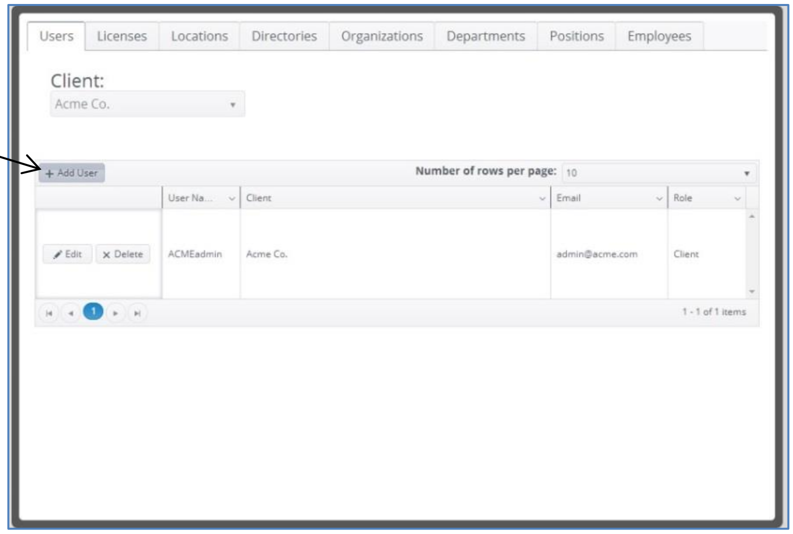



## Users

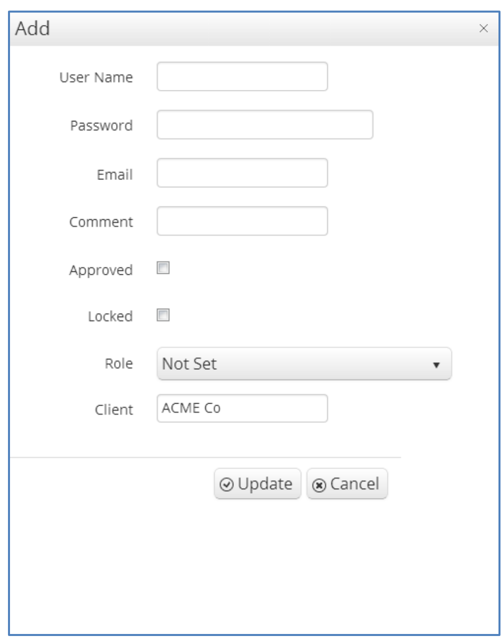
Accessible only to Client Admin users, the Users Tab is where the Client administrator creates and manages other Users within their system who will have access to create and manage content on the ALICE Admin Portal.

Simply click the **Add User** button on the top of the data grid to add a User.

This is similar to how you will add other items throughout the Directory.



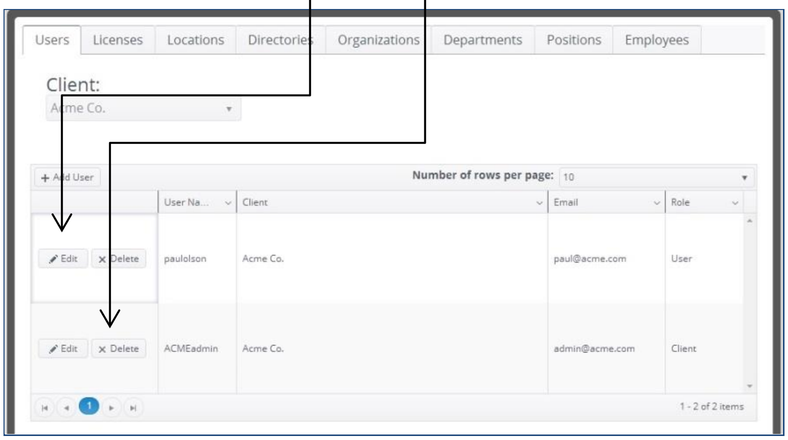

Upon clicking the **Add User** button the **Add** input form will display.




- **User Name** (required)**:** Add the User name for the user to log in with
- **Password** (required)**:** Add the password for the user to log in with
- **Email** (required)**:** Add an email for the user
- **Comment:** Any comment you may wish to add
- **Approved:** Check to enable this users account, uncheck to lock it out
- **Locked:** If checked, this user's account has been locked out. Uncheck this field to unlock the user's account.
- **Role** (required)**:** Determine if the new account will have admin access ("Administrator") or

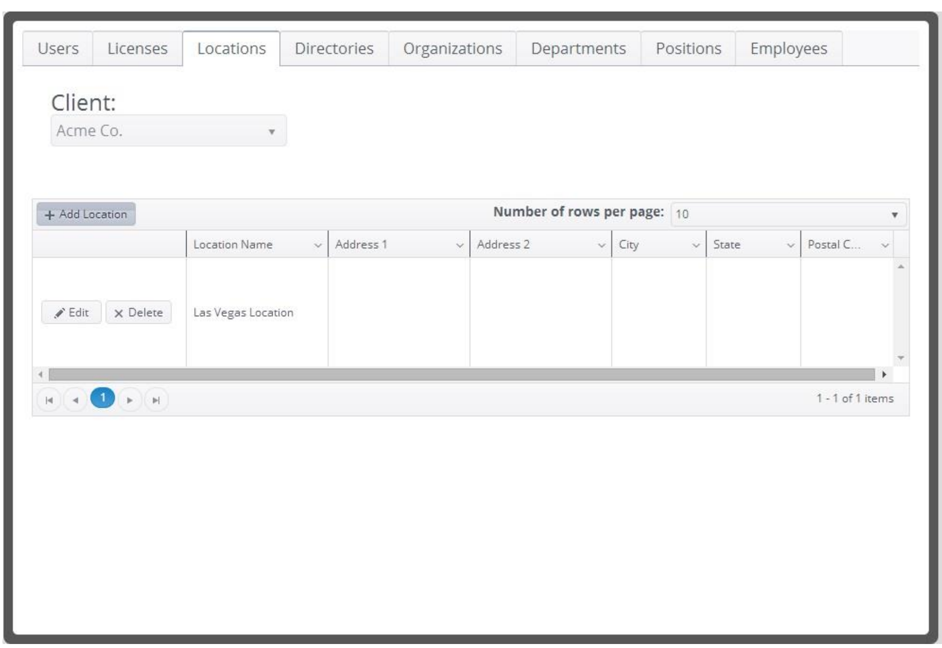
regular access ("User") or Reports only ("Report Viewer").

Click the **Update** button to save changes for the new user or **Cancel** to cancel and close the form. You can return to the Users tab to **Edit** or **Delete** existing users.



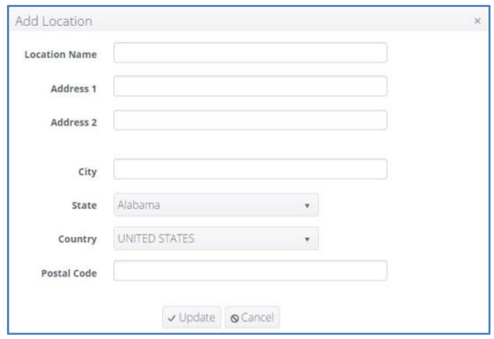

## Locations

Locations represent physical locations where ALICE Directories are installed. You can organize your Locations as you like, but we recommend you create a separate Location for each physical address in which an ALICE Directory is installed. (You can have multiple Directories listed at a single location).



To create a new location, click the **Add Location** at the top of the data grid.

The **Add Location** form will appear and allow you to enter the following information about your new location:




- **Location Name:** Descriptive name to identify the location
- **Address Line 1:** Location Address #1
- **Address Line 2:** Location Address #2
- **City:** Location City
- **State:** Location State
- **Country:** Location Country
- **Postal Code:** Location Zip Code

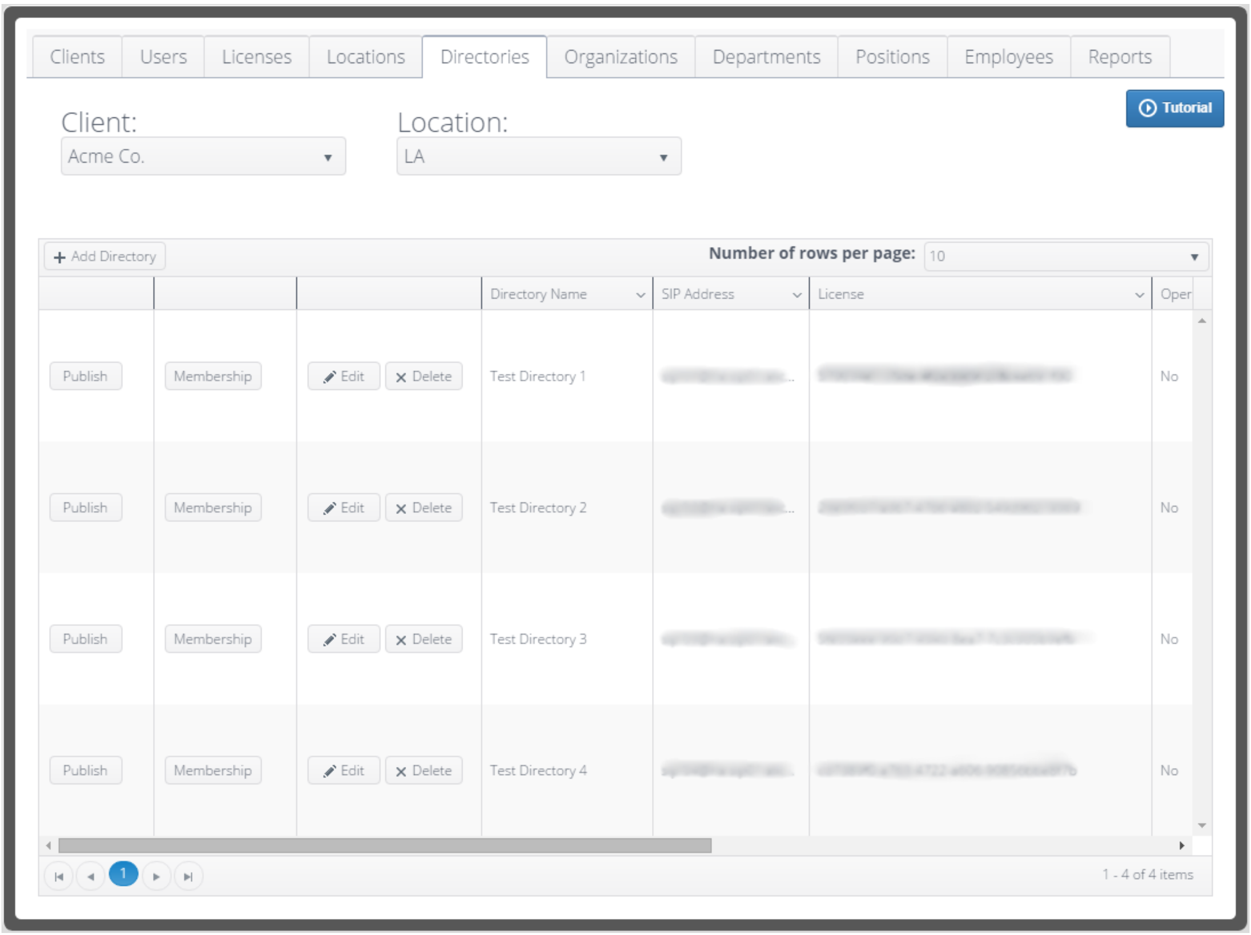
Click the **Update** button to save changes for the new Location or **Cancel** to cancel and close the form.

In the future, you can modify or delete an existing Location by clicking on the **Edit** or **Delete** buttons next to the location name.

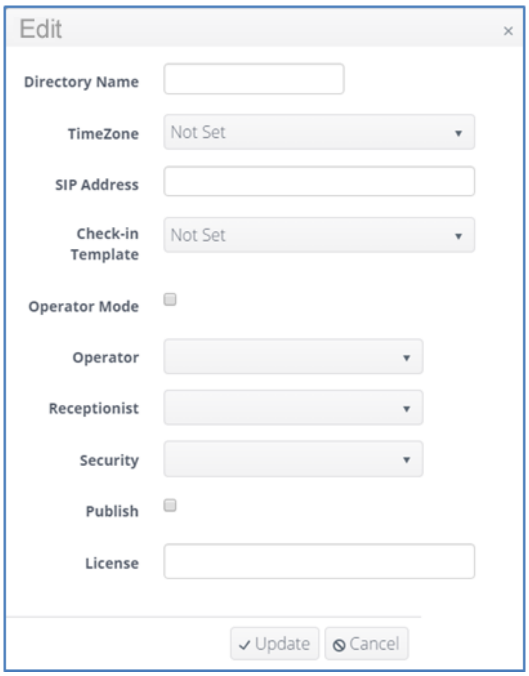
## Directories

Directories represent each ALICE Directory device you have purchased. Each Directory has a unique License Key number that it uses to register on the ALICE License server when it launches. Directories can have their own unique user data, or can share data with other Directories within your company. The number of Directories you have is limited to the number of ALICE Directory licenses you have purchased. You will see one Directory in this list for each Directory License you purchased.

To edit a Directory, click the Edit button on the data grid.



The **Edit Directory** form will appear and allow you to enter the following information about your new Directory:



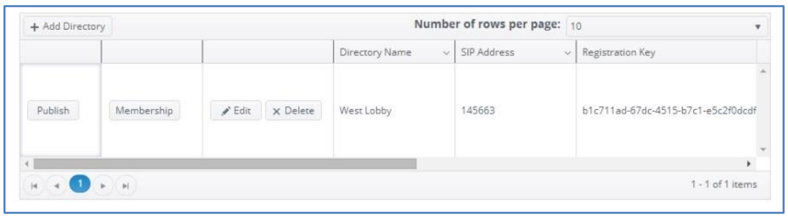

- **Directory Name:** Provide a descriptive name for the Directory.
- **TimeZone:** Select the correct time zone for the location of where the Directory machine is located.
- **SIP Address:** Enter the SIP address for this Directory. This will in most cases be provided by WinTech during your initial Account Setup.
- **Check-**in Template: Choose the template for the visitor check-in feature if your Directory is using that feature
- **Operator Mode:** Check this box if you want to enable Operator Mode. (See ALICE Directory User Manual for information about Operator Mode).
- **Operator:** If the Operator Mode box is checked, you also need to choose the Employee you want to be your operator. If you have not created any Employees in your Organization yet, you will need to return and edit this field after you have done so.
- **Receptionist:** The ALICE Directory has a Receptionist button that can be configured to call a specific Employee. To turn on that Receptionist button, select an Employee from the drop down list to be the designated Receptionist. If you have not created any Employees in your Organization yet, you will need to return and edit this field after you have done so.
- **Security:** The ALICE Directory has a Security button that can be configured to call a specific Employee. To turn on that Security button select an Employee from the drop down list to be the designated Security contact. If you have not created any Employees in your Organization yet, you will need to return and edit this field after you have done so.
- **Publish:** Click the **Publish** box in order to ensure that the changes will be reflected on the Directory the next time it starts. Saved changes will not be sent to the Directory unless they are "Published".

Use the **Publish** button to send the changes to the selected Directory. The changes will be reflected when the Directory is restarted. Or, click **Cancel** to cancel changes and close the form.

In the future, you can modify or delete an existing Directory by clicking on the **Edit** or **Delete** buttons next to the Directory name in the data grid.

## Directory Registration License Key

A unique ALICE Directory License key has been assigned to each Alice Directory you've purchased. Each license key is associated with the specific machine that key is initially installed on. While you can see and copy the license key you will not have access to change it.



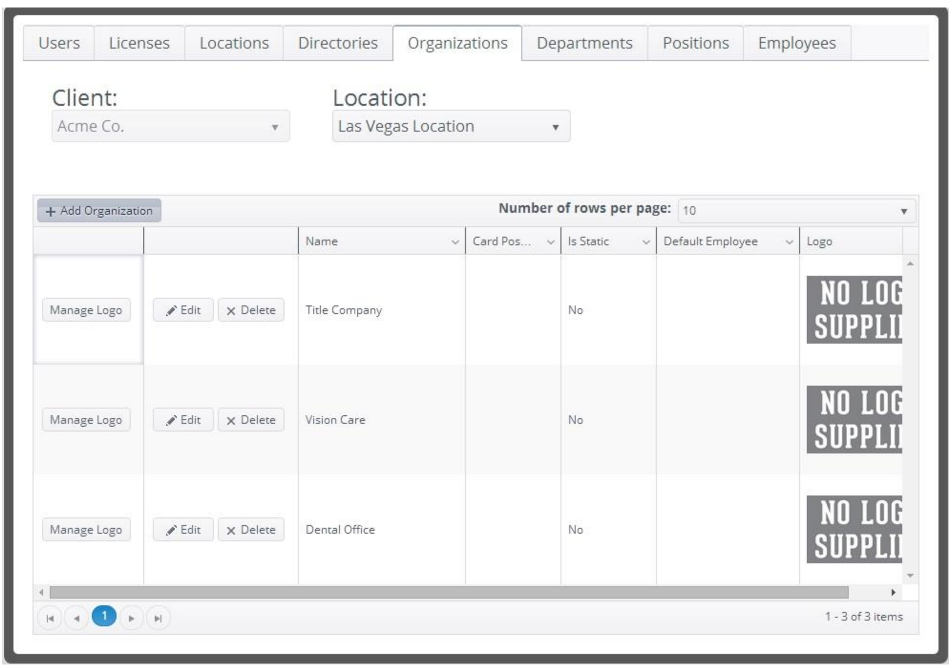

Now that you have created your Directory, you are ready to create the Organizations, Departments and Employees which will be displayed on your ALICE Directory system.

## Organizations

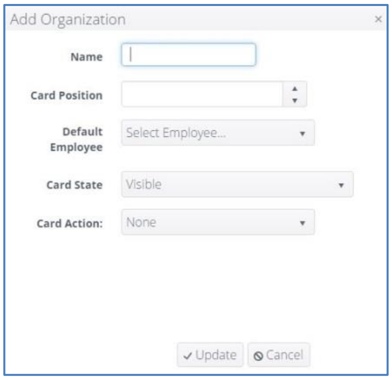
Each Directory you created within your company can contain one or more Organizations. If your ALICE system will be used to only manage one specific grouping of employees, you need only create one Organization. If your ALICE system will manage employees from various groups, companies, or organizations then it is recommended that you create a separate Organization for each grouping that will be listed on the ALICE system. Depending on the structure of the system you are managing, you might even use the terms “company” and “organization” interchangeably.

There is no limit to the number of Organizations you can create, however, you can only activate the number of Employees within those Organizations that you have Client licenses for.

**Before you can create a new Organization you must have selected a Location in which to add the Organization. If you only have one location, the system will select that for one you.** ***If you have more than one location you will need to select a Location before the Add Organization button will appear.***




When you click the **Add Organization** tab, the Add Organization window will appear.




- **Name:** The Organization name.

- **Card Position:** Only set a card position if you want the Organization to be listed in a specific order on the ALICE Directory screen. Otherwise, organizations will sort alphabetically by default.

- **Default Employee:** The Organization card can be configured to call a specific person when pressed. To turn on this feature, select an employee from the list for the system to call when some presses the organization card. If you have not created any Employees in your Organization yet, you will need to return and edit this field after you have done so.

- **Card State:** Select one of the available Card States that are available for Organizational Cards. Card States include:
    - **Visible:** The default Card State for Organization Cards.
    - **Static:** When there is more than one page of Organizational cards on a Directory, Cards set to a Static state will display on each of the pages.
    - **Card Hidden:** The card will be hidden on the Directory screen and will not be visible.
    - **Name Hidden:** The name of the Organization will not display on the Card. This is useful if you want to assign a image to the card instead of displaying its name.
    - **Static and Name Hidden:** The card will display on every page of the Organizational Directory and the name will be hidden.

- **Card Action:** Select one of the available actions that this card should perform when the card is pressed on the ALICE Directory screen. Card Actions include:
    - **None:** The default action for Organization cards is to simply drill down and display the list of Departments or Employees that are members of this Organization
    - **Call:** Place a call to the employee selected in the **Default Employee** field on this form.
    - **URL:** Display web page when the users presses on this Organization Card. Additional Settings for the URL Card Action type includes
        - **Browser Zoom:** Set the zoom level for the browser when it opens the URL
        - **Remove Links:** prevents popup browser pages from opening when a user clicks on links on the web page

- **Contact Number:** identified a phone number that will be called by the "Call" button in the browser navigation tool bar.
- **URL:** Enter the URL address that should be opened when the user clicks on This Organization card.

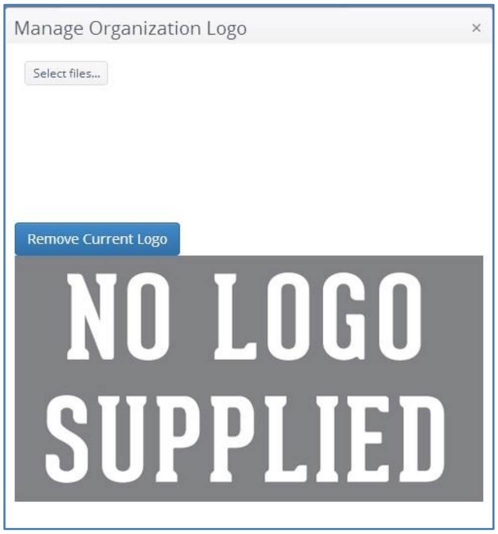
- **Image:** Displays an image file (.jpg) when the user pressed on this Organization Card. Additional Settings for the Image Card action include:
  - **File Name:** The name of the file to open (example format: "newimage.jpg") All images must be loaded on the ARD machine in the following location in order to be loaded correctly: **C:\Program Files (x86)\WinTech LLC\Alice\Directory\Content\CardImages**
- **Video:** Plays a video file. Additional Settings for the Video Card Action include:
  - **Video Loop:** Will loop the video file
  - **Video Fullscreen:** The video will fill the space available on the Directory for the video content
  - **File Name:** The name of the video file to play (example format: "newvideo.wmv"). All video files must be loaded on the Alice Directory machine in the following location in order to be played correctly: **C:\Program Files (x86)\WinTech LLC\Alice\Directory\Content\CardVideos**

Click the **Update** button to save changes for the new Organization or **Cancel** to cancel and close the form.

In the future, you can modify or delete an existing Organization by clicking on the **Edit** or **Delete** buttons next to the Company name in the data grid.

**Manage Logo**

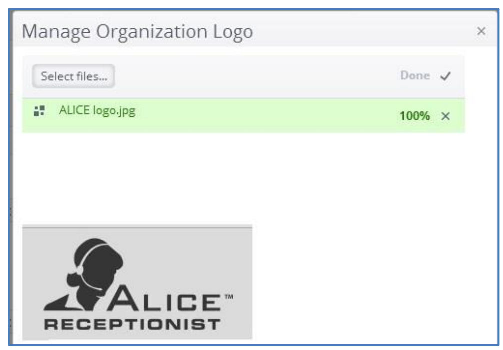
You can upload a custom image for each Organization you create. This allows each Organization to be listed on the ALICE Directory screen with their logo or any other graphic you choose to create. Use the Manage Logo button in the first column of the data grid for the Organization you wish to update. Once you click the **Manage Logo** button, the Manage Organization Logo form will appear.




**Select File:** Use this form to upload an image for this Organization. The image size will be stretched to fit on the Organization Card size you set in the ALICE Directory configuration form. You will want to use an image that is the correct size or proportionally larger so it can scale and retain its aspect ratio.

**** The recommended image size is 400 x 130 pixels.***

**** The image should be uploaded in .JPG format.***




**Save:** After you have selected your Organization image, it will appear in the form. Click the "**x**" button in the top right corner of the form to save and close the form.

**Delete:** If you ever need to change the Organization logo, return to this form and use the Remove Current Logo button to delete the previously loaded image.

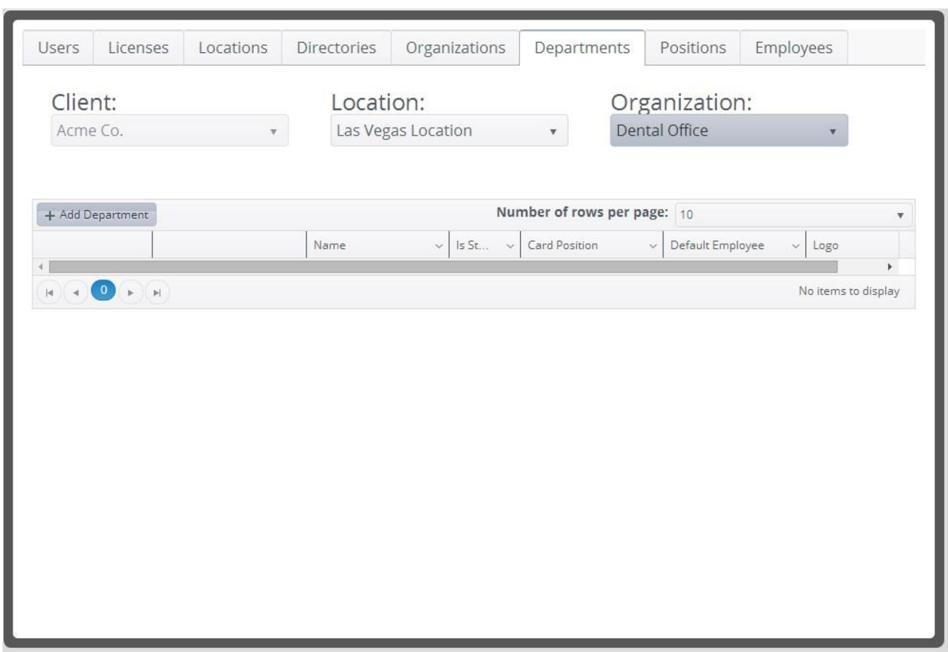
**Change:** You can also replace an existing image by selecting a new image and saving the form with the new image.

## Departments

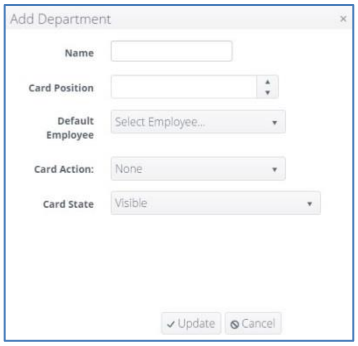
Each Organization you created in your company can contain one or more Departments. Departments are an optional sub-organization category and do not have to be used. They are helpful if you want your Employees to be grouped on your ALICE Directory screen by Department, or if you want to create a list of Departments to display on your ALICE Directory screen in place of Employees.

There is no limit to the number of Departments you can create.

**Before you can create a new Department, you must have selected an Organization in which to add the Department. If you only have one Organization, the system will select it for you.* ***If you have more than one Organization you will need to select an Organization before the Add Departments button will appear.***




Click the **Add Department** button and the Add Department form will appear to allow you to enter the following information about your new Department.




- **Name:** The name of the Department
- **Card Position:** Only set a card position if you want the Department Card to be listed in a specific order. Otherwise Department Cards will sort alphabetically by default.
- **Default Employee:** The Department card can be configured to call a specific person when pressed. To turn on this feature, select an Employee from the list for the system to call when someone presses the Department card. If you have not created any Employees in your Organization yet, you will need to return and edit this field after you have done so.
- **Card State:** Select one of the available Card States that are available for Department Cards. Card States include:
    - **Visible:** The default Card State for Department Cards.
    - **Static:** When there is more than one page of Department cards on a Directory, Cards set to a Static state will display on each of the pages.
    - **Card Hidden:** The card will be hidden on the Directory screen and will not be visible.
    - **Name Hidden:** The name of the Department will not display on the Card. This is useful if you want to assign a image to the card instead of displaying its name.
    - **Static and Name Hidden:** The card will display on every page of the Department Directory and the name will be hidden.
- **Card Action:** Select one of the available actions that this card should perform when the card is pressed on the ALICE Directory screen. Card Actions include:
    - **None:** The default action for Department cards is to simply drill down and display the list of Employees that are members of this Department
    - **Call:** Place a call to the employee selected in the **Default Employee** field on this form.
    - **URL:** Display web page when the users presses on this Department Card. Additional Settings for the URL Card Action type includes
        - **Browser Zoom:** Set the zoom level for the browser when it opens the URL
        - **Remove Links:** prevents popup browser pages from opening when a user clicks on links on the web page

        - **Contact Number:** identified a phone number that will be called by the "Call" button in the browser navigation tool bar.

        - **URL:** Enter the URL address that should be opened when the user clicks on This Organization card.

    - **Image:** Displays an image file (.jpg) when the user pressed on this Department Card. Additional Settings for the Image Card action include:

        - **File Name:** The name of the file to open (example format: "newimage.jpg") All images must be loaded on the ARD machine in the following location in order to be loaded correctly: **C:\Program Files (x86)\WinTech LLC\Alice\Directory\Content\CardImages**

    - **Video:** Plays a video file. Additional Settings for the Video Card Action include:

        - **Video Loop:** Will loop the video file

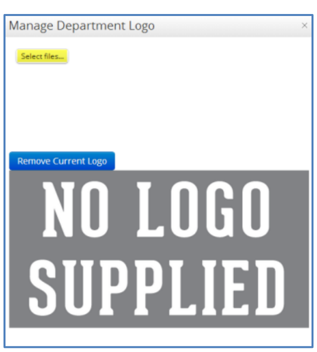
        - **Video Fullscreen:** The video will fill the space available on the Directory for the video content

- **File Name:** The name of the video file to play (example format: "newvideo.wmv"). All video files must be loaded on the Alice Directory machine in the following location in order to be played correctly: **C:\Program Files(x86)\WinTechLLC\Alice\Directory\Content\CardVideos**

Click the **Update** button to save changes for the new Department or **Cancel** to cancel and close the form.

In the future, you can modify or delete an existing Department by clicking on the **Edit** or **Delete** buttons next to the Department name in the data grid.

**Manage Logo**

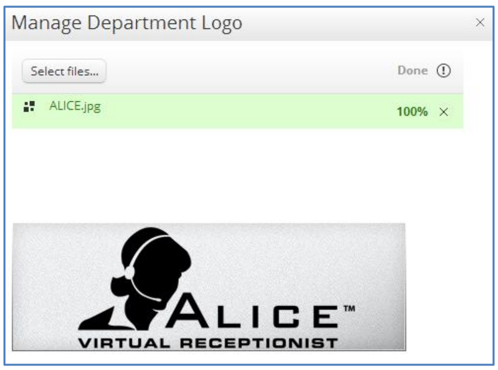



You can upload a custom image for each Department you create. This allows each Department to be listed on the ALICE Directory screen with their logo or any other graphic you choose to create. Use the **Manage Logo** button in the first column of the data grid for the Department you wish to update.

**Select File:** Use this form to upload an image for this department. The image size will be stretched to fit on the Department Card size you set in the ALICE Directory configuration form.  You will want to use an image that is the correct size or proportionally larger so it can scale and retain its aspect ratio.

**** The recommended image size is 400 x 130 pixels.***

**** The image should be uploaded in .JPG format.***




**Save:** After you have selected your Department image it will appear in the form. Click the "**x**" button in the top right corner of the form to save and close the form.

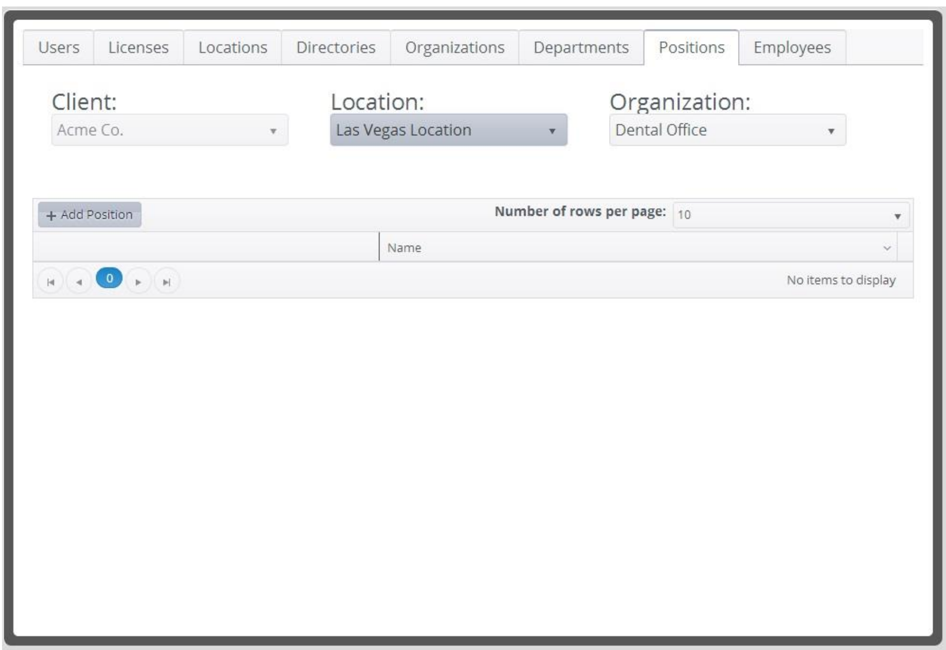
**Delete:** If you ever need to change the Department logo, return to this form and use the Remove Current Logo button to delete the previously loaded image.

**Change:** You can also replace an existing image by selecting a new image and saving the form with the new image.

## Positions

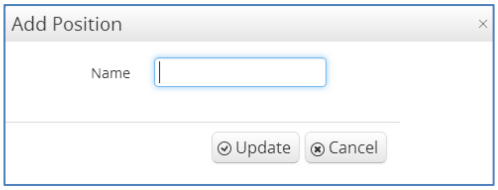
You are able to create Positions or Titles for each Employee within your Organization. Before an Employee can be assigned a Position or Title, you must create a list of Positions within your Organization. Example Positions include: Manager, Bookkeeper, Account Executive, Sales Representative, Technical Support, Security, etc. Create as many Positions as you will need for the Employees you will be creating. You only need to create each Position once; you can use the same Position for multiple Employees once it is created.

In order to create a Position, simply click on the **Add Position** button. This will open up a pop up screen allowing you to name the Position.




There is no limit to the number of Positions you can create.

**Before you can create a new Position, you must have selected an Organization in which to add the Position. If you only have one Organization, the system will select it for you.* ***If you have more than one Organization you will need to select an Organization before the Add Positions button will appear.***



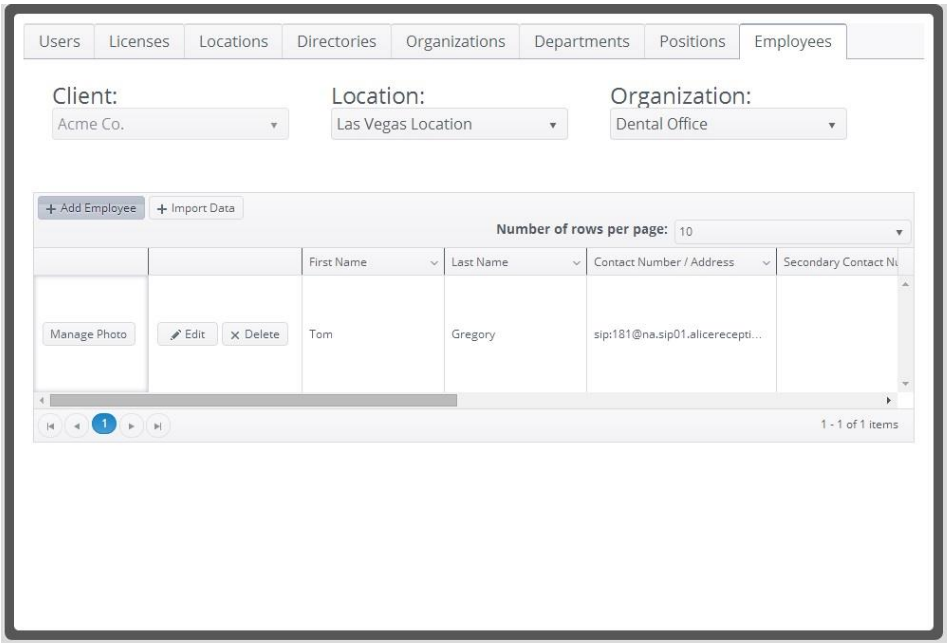

In the Add Position form, simply type the name of the Position you want to create.

Click the **Update** button to save changes for the new Position or **Cancel** to cancel and close the form.

In the future, you can modify or delete an existing Position by clicking on the **Edit** or **Delete** buttons next to the Position name in the data grid.

## Employees

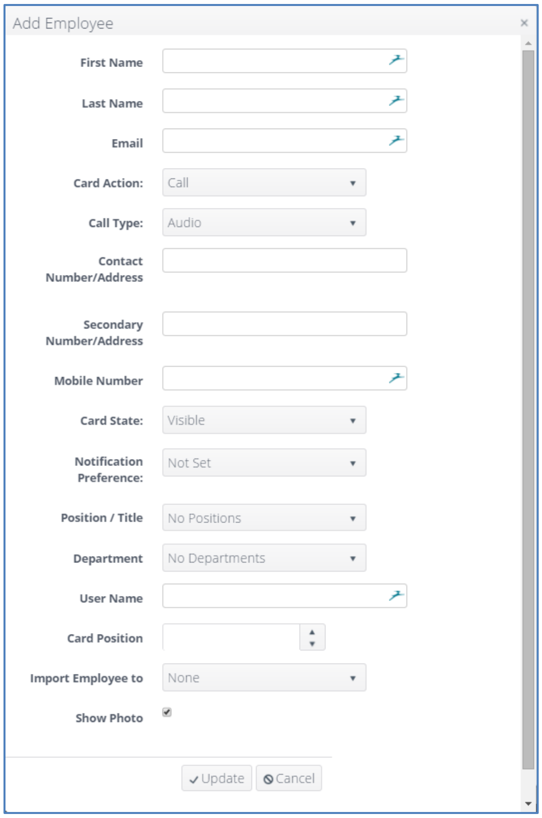
Employees are created using the **Add Employee** form, or you can upload your own list of employees by using the **Import Data** form. In order to appear on a Contact Card on the ALICE Directory screen, each person must be associated with an Employee that has been created in this section.




**Before you can create a new Employee. you must have selected an Organization in which to add the employee. If you only have one Organization, the system will select it for you.* ***If you have more than one Organization you will need to select an Organization before the Add Employee button will appear.***

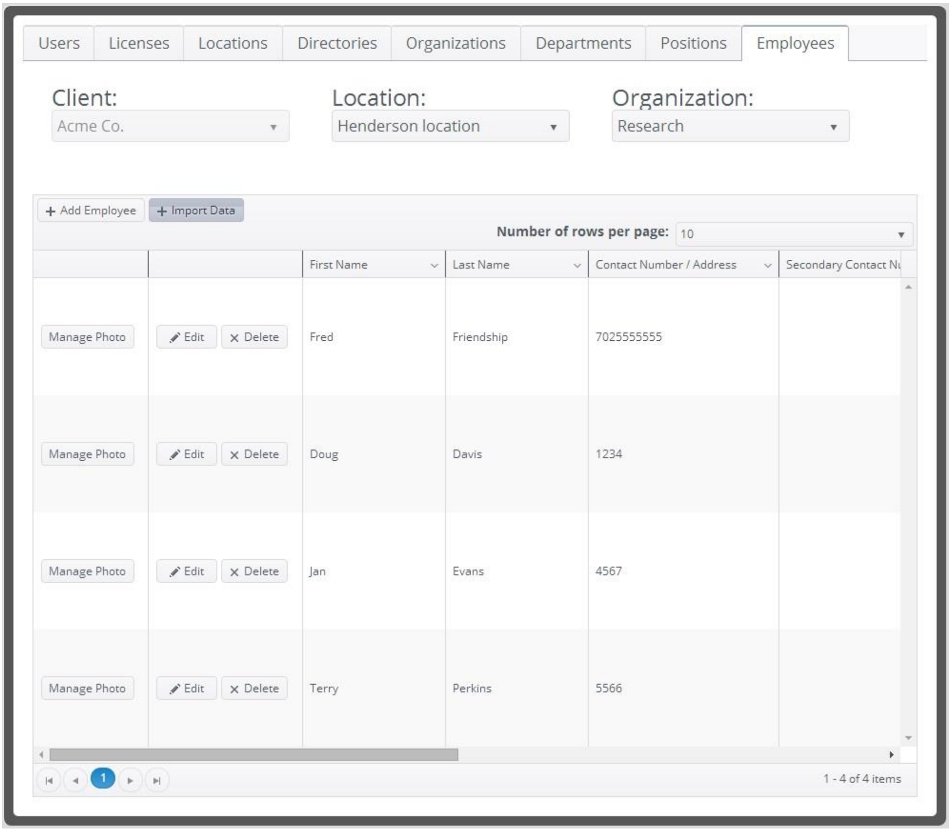
To add a new Employee, click **Add Employee** at the top of the data grid.

This will open the Add Employee form, which you'll need to complete in order to add the new Employee.



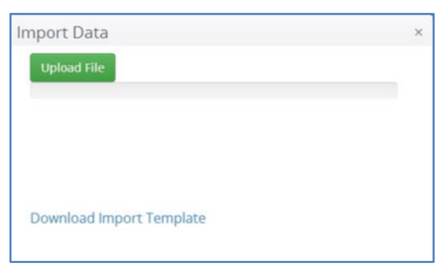

- **First Name (Required):** First name.
- **Last Name:** Last name.
- **Email:** Email address (only necessary for users who are using ALICE Client software)
- **Card Action:** The Action the card should take when pressed
- **Call Type:** The type of call the ARD should make to the employee
- **Contact Number / Address (required):** Contact information for Employee. *See Contact Number / Address section below for format details for this field.*
- **Secondary Contact Number:** Use this field only if the user will be using 1-way communication features
- **Mobile Number:** The mobile phone number of the employee
- **Card State:** The state of the cards when displayed on the Directory screen.
- **Notification Preference:** Select the notification preference for the employee if your ARD has the Visitor Check-in feature enabled.
- **Position/Title:** Select Employee's Position.
- **Department:** Select Employee's Department.
- **User Name (required):** The user name for this Employee. The system will auto-fill this field based on the first plus last name entered (e.g. David.Smith). You may overwrite this value, however, it is important that each user has a unique user name.
- **Card Position:** Only set the card position value if you want the Employee to be listed in a specific order on the Contact Card section of the Directory. Otherwise the Employees are sorted alphabetically.
- **Import Employee to:** Select the name of the Directory that the Employee should become a member of.
- **Show Photo:** Show or hide the employees photo on the employee card.

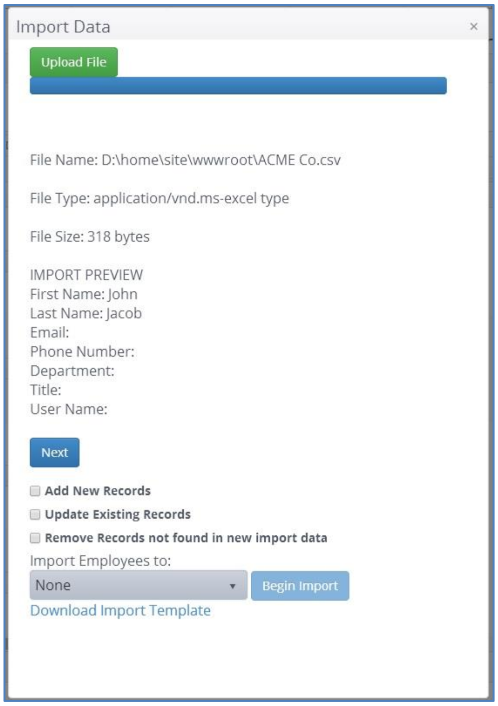
Once this information has been completed, click the **Update** button to save changes for the new Employee or **Cancel** to cancel and close the form.




To add an employee's photo, use the **Manage Photo** button in the Employee Grid. Browse for the employee photos and upload it.

To import your list of employees, click the **Import Data** button at the top of the data grid. This will open the Import Data form. From here, you can directly upload an existing file by clicking **Upload File**. If you need a template for filling out your employee data, click the **Download Import Template** button. This will provide you with a simple spreadsheet for entering your own employee data. Once you save that spreadsheet file, you can upload it using the **Upload File** button.






After you have uploaded your file, you will be able to preview each entry in the file by clicking **Next**. If you are finished previewing or you do not need to preview, set your import type as follows.

## Choosing the Import Type:

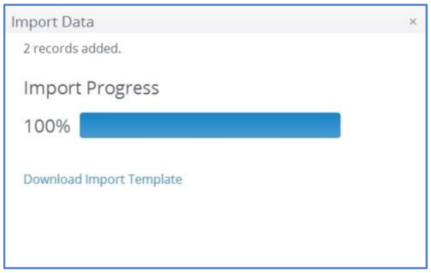
- **Add New Records** Will ADD any employees found in the Import file which do not exist in the ALICE Employee List.

- **Update Existing Records** Will UPDATE any employees found in the Import file with the same FIRST & LAST NAME in the ALICE employee list.

- **Remove Records not found in new import data**. Will DELETE any employees found in the ALICE employee list but which are not found in the Import file. There are a few exceptions where employees CAN NOT be removed during the import. These include the following situations:
  - The employee to be deleted is currently set as a DEFAULT EMPLOYEE for an Organization or Department
  - The employee to be deleted is currently set as the Operator, Receptionist or Security contact for a Directory

- **Import Employees to:** Select a Directory from the list to assign all employees in the import file to that Directory when they are imported. This will add them to the membership for the selected Directory. Select "NONE" if you do not want to assign employees to a specific Directory during the Import process.

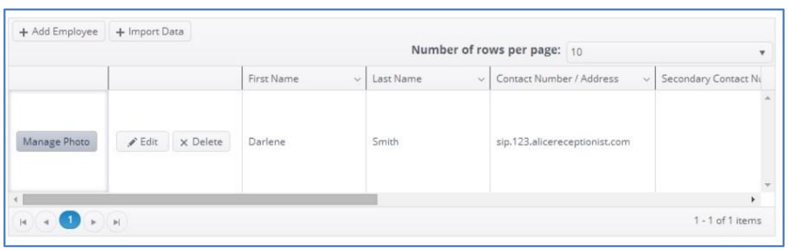
Click the **Begin Import** button after making all appropriate selections from the options above. The system will audit the information you have provided. If an error is found, the system will prompt you to download the error log. Ensure that all minimum required fields have been entered in order to avoid errors. When your import has successfully completed, the system will advise you that the records have been added.




Click the "**x**" at the top of the window to finish the Import Data task.

In the future, you can modify or delete an existing Employee by clicking on the **Edit** or **Delete** buttons next to the Employee name in the data grid.

The **Manage Photo** button is a place holder for a feature that will be released in the near future to allow users to upload employee photos which will then display on the ALICE Directory machine. This feature is currently not fully implemented, so using it will not have impact on the ALICE Directory interface. When this feature has been activated this manual will be updated with instructions for using this function.



## Contact Format Requirements

There are various options for how Employees can communicate using the ALICE Receptionist System. The Contact Number / Address that is entered identifies the type of communication that Employee will use. The system will automatically identify the type of communication based on the format of data entered. There are three types of users possible.

### PHONE USERS:

These are employees who will receive calls to a desk phone or mobile phone. Valid formats are (do not include quotes when entering your values):

- **Phone Number: "1112223333"**, **"111-222-3333"** Do not include any formatting such as parenthesis; simply enter the 10-digit phone number. (Numbers outside the US can be entered using standard international country codes and call formats).
- **Extension Only: "1234"**. If you are connecting the ALICE Directory to an internal VoIP server, you can dial by extension by just entering the user's extension number.
- **Main Phone Number and Extension: "1112223333,,,,,,1234"** If your users do not have DID (direct dial) phone numbers, you can enter a main number, add a number of pauses (each comma represents a ½ second pause) and then the user's extension to have the ALICE Directory navigate your organization's phone menu.

### ALICE CLIENT USERS:

These are users who will receive calls using the ALICE Client software. Use the following format (do not include quotes when entering your values):

- **ALICE Client Users:** "sip:123@na.sipo1.alicereceptionist.com"
    - "**123**" represents the unique extension provided for this user by WinTech.
    - "**na.sipo1.alicereceptionist.com**" represents the URL of the ALICE Cloud Communication server provided by WinTech.

### 3RD PARTY SIP SOFTPHONE USERS

These are users who use 3rd party SIP softphones to receive calls from the ALICE Directory. 3rd party SIP softphones can run on PCs, tablets and smartphones (iPhone, Windows, or Android devices). WinTech currently supports the Bria line of softphones offered by CounterPath. Visit http://www.counterpath.com/products.html for more information about their softphone products and to purchase licenses.

- **3rd Party SIP Softphone users:** "bria_sip:123@na.sipo1.alicereceptionist.com"
    - "**123**" represents the unique extension provided for this user by WinTech.
    - "**na.sipo1.alicereceptionist.com**" represents the URL of the ALICE Cloud Communication server provided by WinTech.

## MICROSOFT LYNC UNIFIED COMMUNICATIONS

Users who are using Microsoft Lync clients for communication can now communicate with ALICE Receptionist systems using their Lync clients.

- MS Lync address

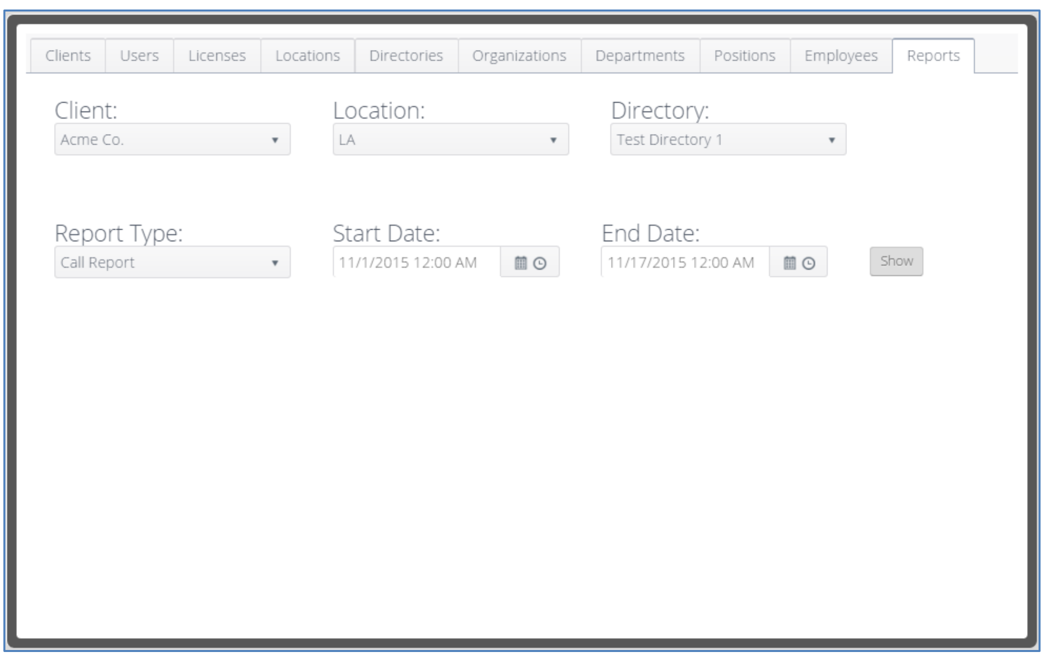
## Reports

The reports tab provides access to reporting on various data points collected by the ALICE Receptionist software. Data collection for these reports must be turned on in the ALICE Receptionist Directory Configuration application before reports will have any data to report on.

Before running any report the user must select a Location and Directory on which to report data. Once these values are selected, the user selects the Report Type and a start and end date for the data they want to report.

Available reports include:

- Call Report: A report that provides information on all calls made by the ALICE Receptionist Directory to employees.
- Usage Report: A report that provides information how visitor use the ALICE Receptionist Directory software, including what buttons are being clicked by visitors
- Visitor Reports: A report that provides information on visitor who have used the Visitor Check-in feature
- Active Visitor Report: A report that provides information on what visitors have checked-in using the Check-in feature but have not Checked-out.

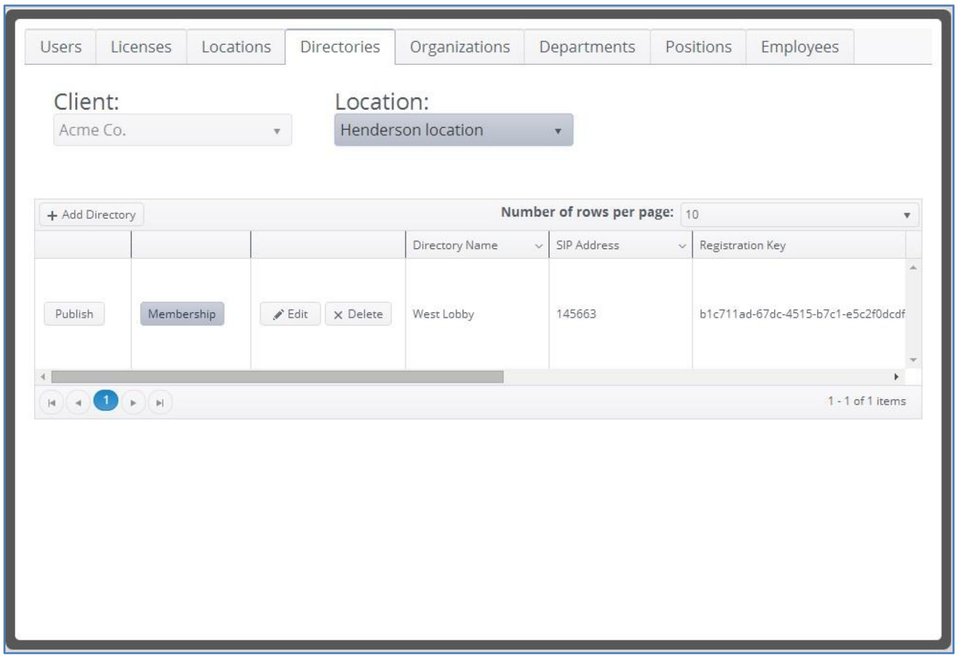


Report Toolbar:


When a report is generated it will include the Report Toolbar at the top of the report. Users can use this toolbar to page through the report, search for data within the report, and export the report to PDF, Word or Excel format.

## Directory Membership

After you have created a list of Organizations and Employees to be listed on the Directory, navigate to the Directories tab. There, you should see the Directory that you just created. In order to add new Employees to your Directory, you will need to assign them to the Directories Membership. To do so, click on the **Membership** button for that Directory.




Using the Directory Membership form, you can either select an entire Organization and all the employees associated with it or you can select Employees individually.


To select the entire Organization and all its associated Employees, check the box next to the Organization name. This example shows the Organization and the expanded Organization list.


To select individual Employees, check the box next to each Employee name you wish to include in the Membership for this Directory after expanding the Organization list. Expand or contract the Organization list by clicking the arrow to the left of the Organization Name.

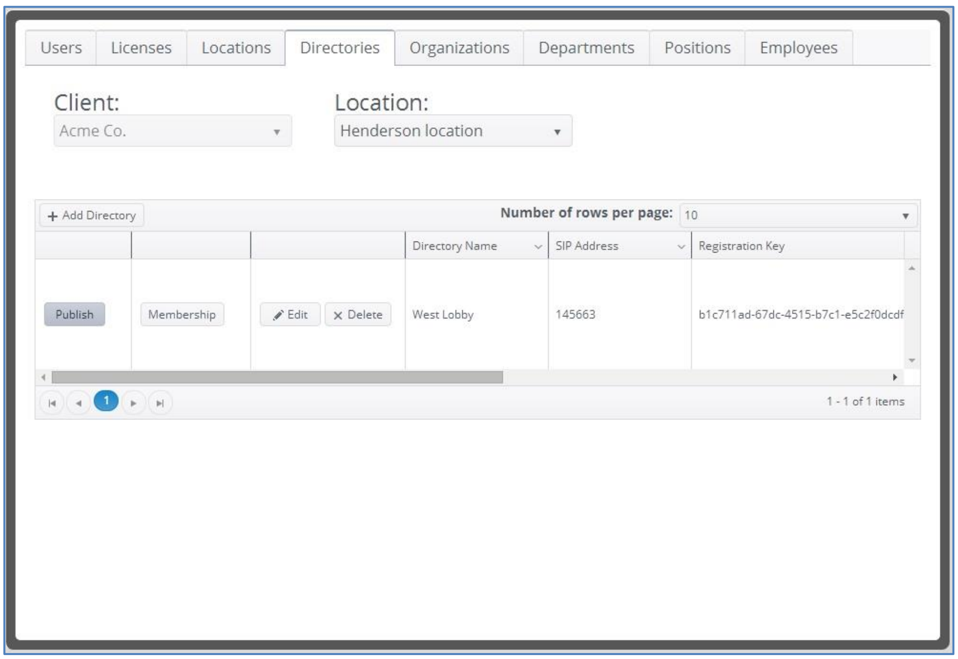
To ensure that new Employees who have been added through the Admin Portal will be automatically assigned to this Directory, click the **Auto add new employees** field.

To save your settings, press the "**X**" button in the top right hand corner of the Directory Membership form.

## Publish Directory

Any time changes are made to any of the Directory content including Directories, Organizations, Departments, Positions, Employees or Membership data, you will need to PUBLISH your changes before they become updated on your ALICE Directory device.

To do so, Navigate to the Directories tab and click the **Publish** button in the row of the Directory you wish to update.




The ALICE Directory will be updated with the changes either at the next scheduled Directory Sync or as soon as the Directory software is restarted manually.

From there, after you restart the Directory, all the changes will be updated and will reflect on the ALICE Directory screen.

You can modify and republish your Directory Membership information as frequently as you wish.