Admin Application for Windows

Version 4.0

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Table of Contents

Chapter 1: Overview

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

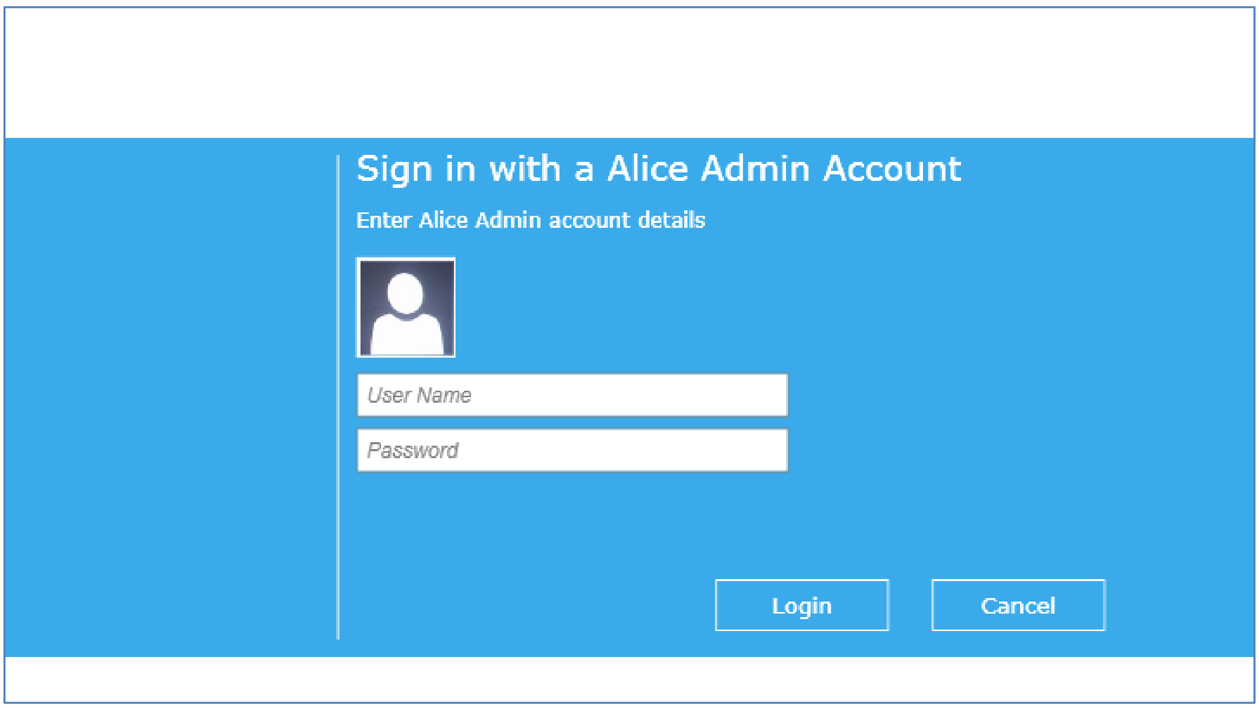
The ALICE Receptionist Admin Application for Windows (herein after referred to as the Admin App) is used to manage the following information and content for the ALICE Receptionist System:

- Customer information including:
    - Users
    - Locations
    - Directories
    - Organizations
    - Departments
    - Employees
        - Database Management through Active Directory or Lync
        - Communications preferences
        - Title / Position
        - Photos

Content administration for the ALICE Receptionist Directory (Directory) is performed using the ALICE Admin App.

Chapter 2: Login

To log in to the ALICE Admin App, launch the App from the Desktop icon:

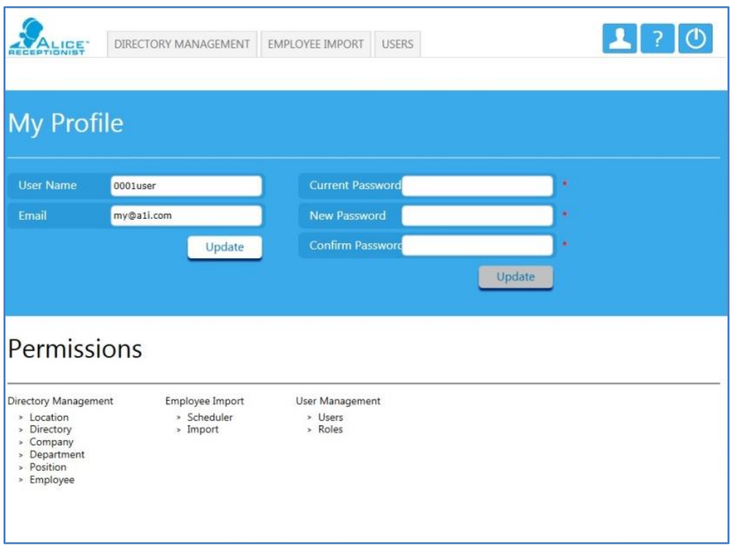


1. Enter your assigned User Name and Password and click the **Login** button.

Chapter 3: App Home Page

Manage Account Using Profile Icon

To change your password, email address, or user name in the system, click on the **Profile Icon**.



To change your User Name or Email, enter the new information and click **Update** under those fields. To change your Password, enter both your current and new passwords and click **Update** under those fields.

Help

To access update messages and user manuals, click the **Question Icon.**

Logging Off

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

NAVIGATION TABS

The Navigation tabs offer three (4) menu items:

- **Directory Management**—Where customers manage their customer data (See Chapter 4)
- **Employee Import—**Where customers import new employees for the system (See Chapter 5)
- **Users**—Where authorized users are created and managed (See Chapter 7)
- **Reports** – Where authorized users are able to generate and view reports (See Chapter 8)

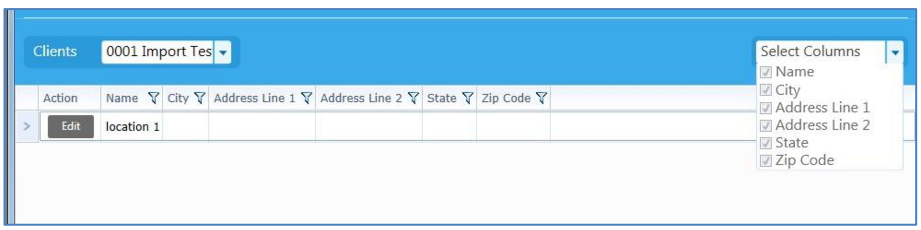
Chapter 4: Directory Management

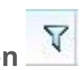
The Directory Management area is where customers create and manage content which will display on their ALICE Directory.

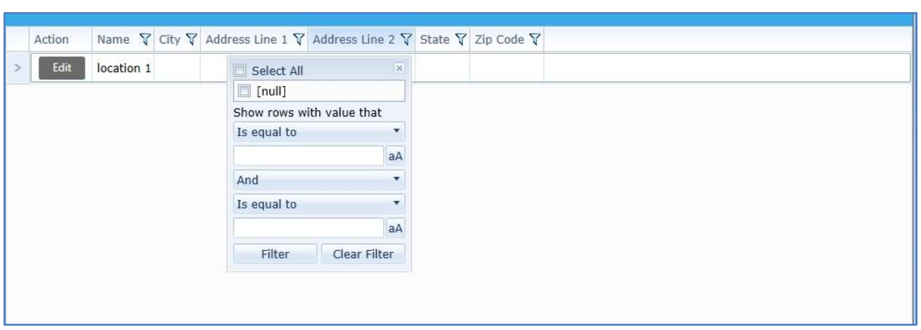
Directory Management Tabs

Grid Navigation

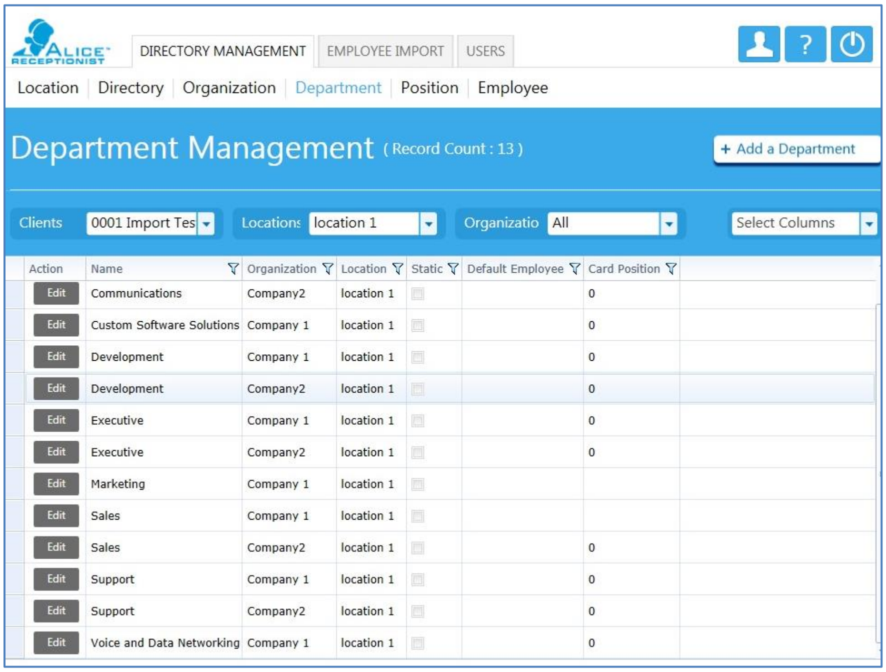
Depending on your user access level, you can select which information will appear in the grid on each tab by clicking the **Select Columns** menu and checking or un-checking the items to appear.



You can also filter the information in each column by clicking the **Filter Icon**  in line with the name of the column.

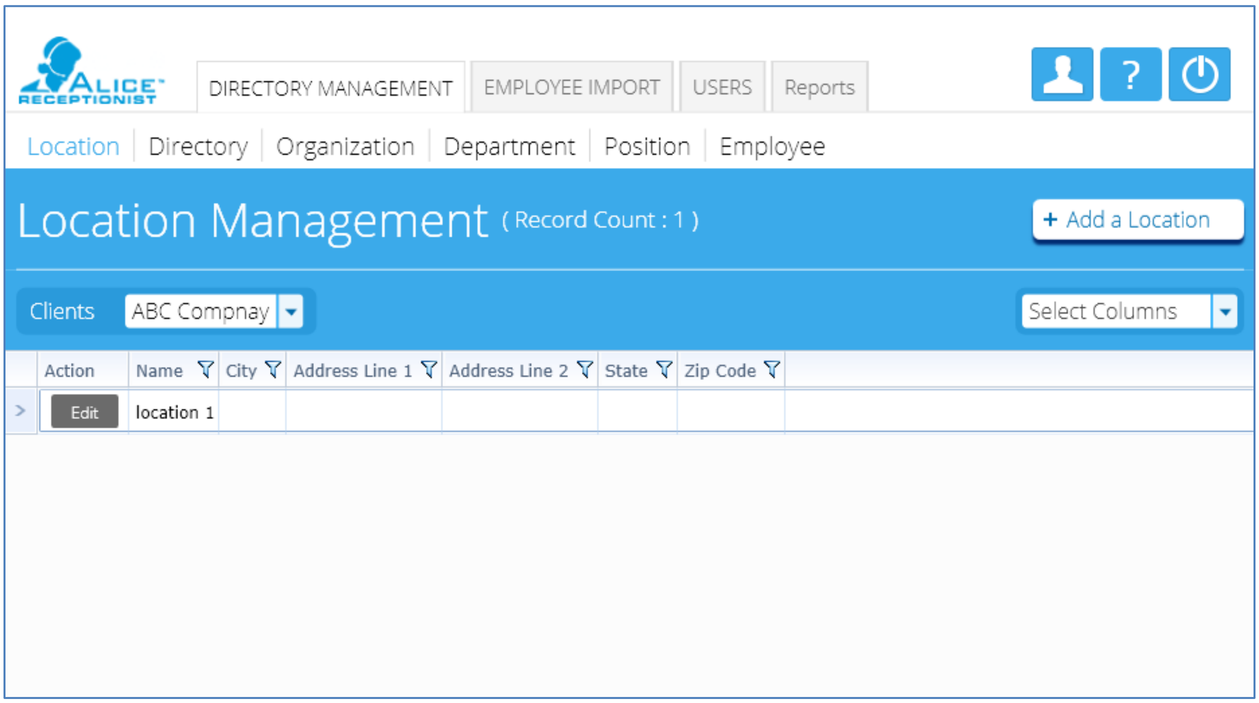


The information in the data grid will extend the window as long as more items are added to the list. Scroll down the list by using the slider bar at the side or the bottom to access more rows or more columns.



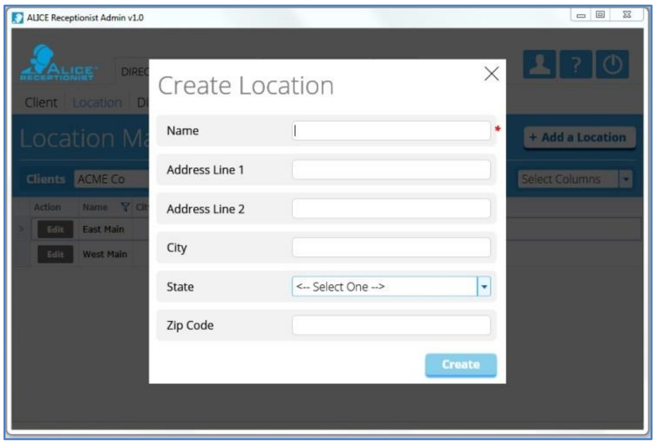
Location Tab

Location Management allows you to edit the information for the physical locations where ALICE Directories are installed. You can organize your Locations as you like, but we recommend that 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 a Location** at the top of the data grid.

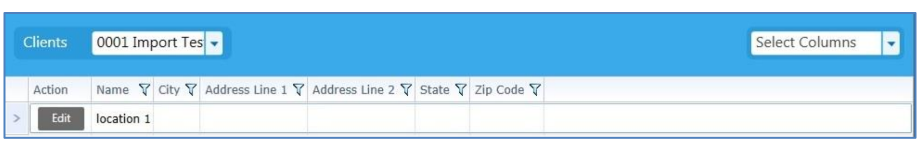
The **Create Location** form will appear and allow you to enter the following information about your new location:



- **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
- **Zip Code:** Location Zip Code

Click the **Update** button to save changes for the new Location or click the **x** at the top right of the form to cancel and close the form without saving changes.

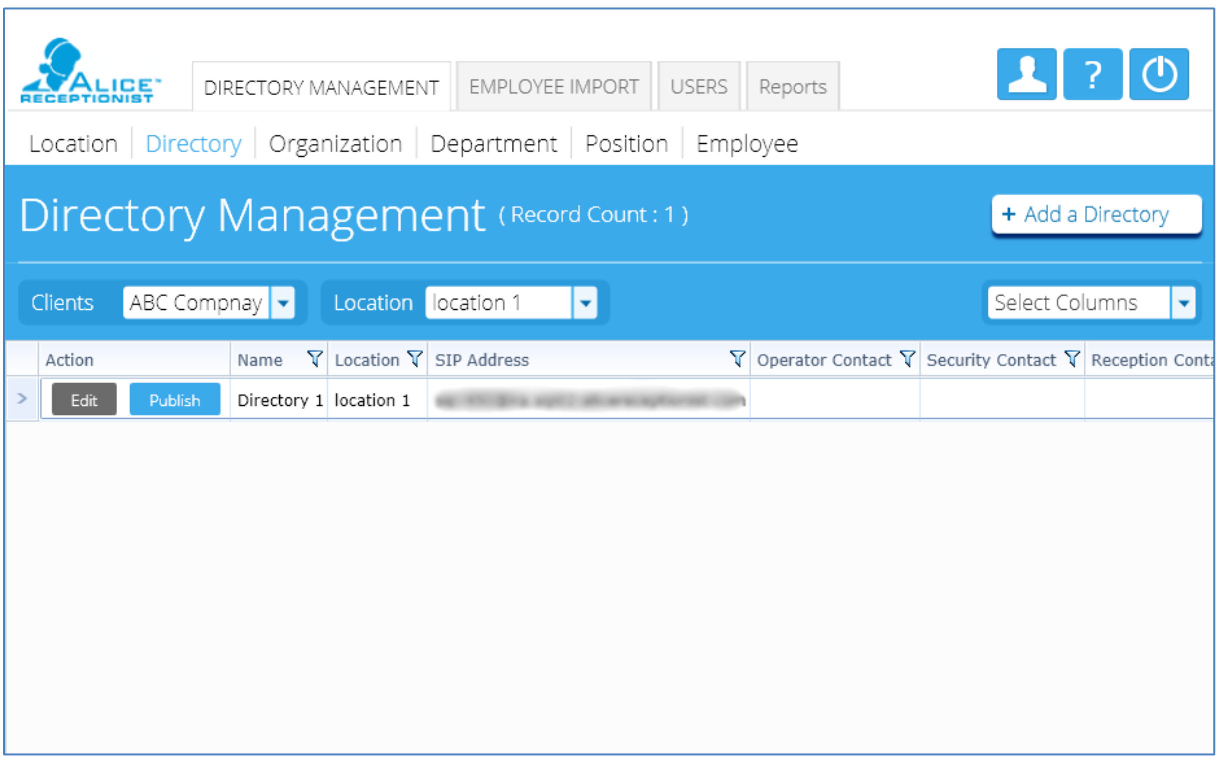
In the future, you can modify or delete an existing Location by clicking on the **Edit** button next to the location name.



Directory Tab

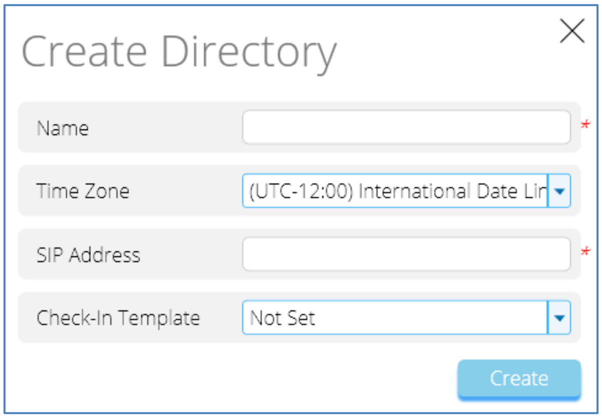
Directories represent each ALICE Directory device you have purchased. Each Directory has a unique License Key number that it must use to register on the ALICE License server when it launches. Directories can have their own unique user data, or can share data with other Directories within your company. The number of Directories you can create is limited to the number of ALICE Directory licenses you purchased with your system. You will not be able to create any more Directories than the number of Directory Licenses you have purchased.

Before you can create a new Directory you must have selected a Location in which to add the Directory. 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 Directory button will appear.*



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

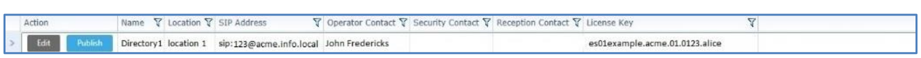
The Add Directory form will appear and allow you to enter the following information about your new Directory:



- **Name**: The unique name of your Directory. This might be characterized by its specific location within a building, such as “Main Lobby”.
- **Time Zone**: The time zone the Directory is located in.
- **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:** The visitor Check-in Template the Directory will use for Visitor Check-in

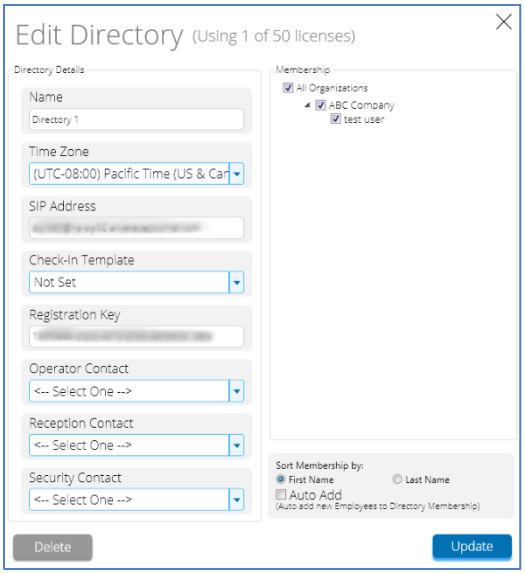
Click the **Update** button to save changes for the new Location or click the **x** at the top right of the form to cancel and close the form.

You will need to manage the membership for this Directory by clicking on the **Edit** button from the data grid.



The Edit Directory form will appear.

When you are finished editing the Directory, you will need to return to the data grid and click **Publish** in order for your saved changes to be communicated to the ALICE Directory.



Directory Details

- **Name:** The unique name of your Directory.
- **Time Zone:** The Time zone the Directory is located in
- **SIP Address:** The SIP address for this Directory.
- **Check-In Template:** The visitor Check-in Template the Directory will use for Visitor Check-in
- **Registration Key:** This has been automatically assigned upon creation of the Directory.
- **Operator Contact:** To set the Directory in Operator Mode, choose an Operator Contact from the list of Employees who are members of this Directory.
- **Reception Contact:** To cause a Receptionist button to appear on the Directory screen, set an Employee who is a member of the Directory to be the Reception Contact.
- **Security Contact:** To cause a Security button to appear on the Directory screen, set an Employee who is a member of the Directory to be the Security Contact.

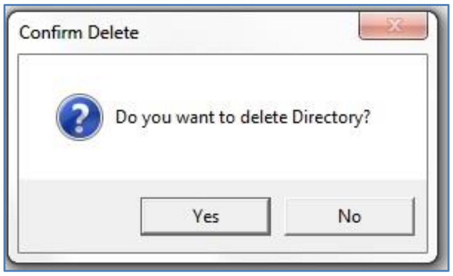
Membership

The Employee list will populate in this field. Use the check boxes to select which Employees will be members of this Directory. This will cause their contact cards to appear on the Directory interface. By checking the box next to the Company name, you will check all Employees in that Company. By checking the boxes next to the individual Employees, you will add or remove that Employee from the Directory membership.

By checking the Auto Add box, new Employees will be added as “checked” members of the Directory when they are created or imported into this Directory.

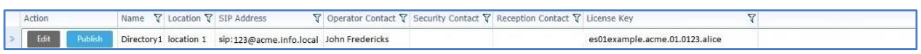
Click the **Update** button to save changes or click the **x** at the top right of the form to cancel and close the form without saving changes.

Click the **Delete** button ONLY if you intend to completely delete this Directory. A confirmation window will appear.



Deleting the Directory should only be performed if you are removing an ALICE Directory from your company's use. If you are moving the ALICE Directory to another physical location, you can simply edit its details.

Return to the data grid to click the **Publish** button in order for your saved changes to be communicated to the ALICE Directory screen.



Action	Name	Location	SIP Address	Operator Contact	Security Contact	Reception Contact	License Key
Edit Publish	Directory1	location 1	sip:123@acme.info.local	John Fredericks			es01example.acme.01.0123.alice

Directory Registration License Key

After you have created a new Directory, the system will assign you a unique ALICE Receptionist Directory License key. You can see this in the data grid for the Directory which you just created. This Key will remain available on this screen for you if you need to refer to it in the future.

Action	Name	Location	SIP Address	Operator Contact	Security Contact	Reception Contact	License Key
Edit Publish	Main Lobby	East Main	123.example.ALICE.local.3344	Sam Samuels			7c9b59ad-c3b0-461a-ad2b-e516e6f48d4c

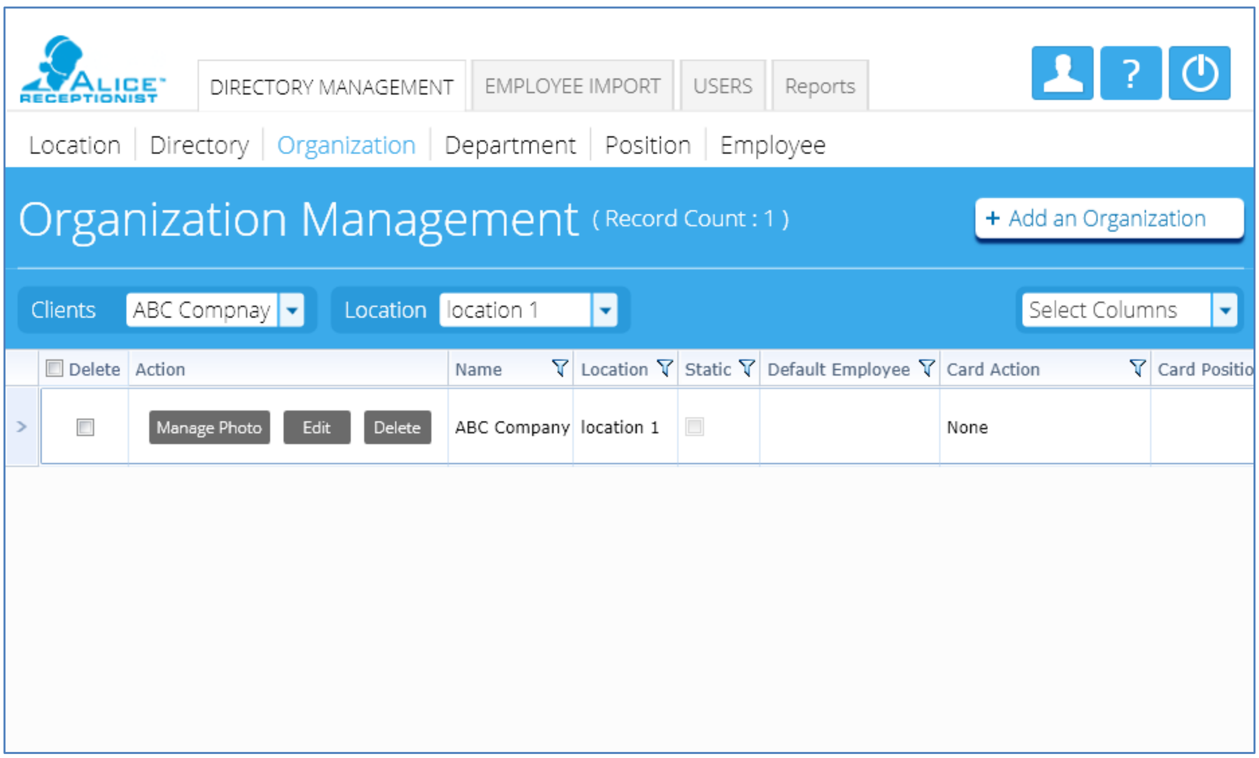
Now that you have created your Directory, you are ready to create the Organizations, Departments, Positions and Employees which will be displayed on your ALICE Directory system.

Organization Tab

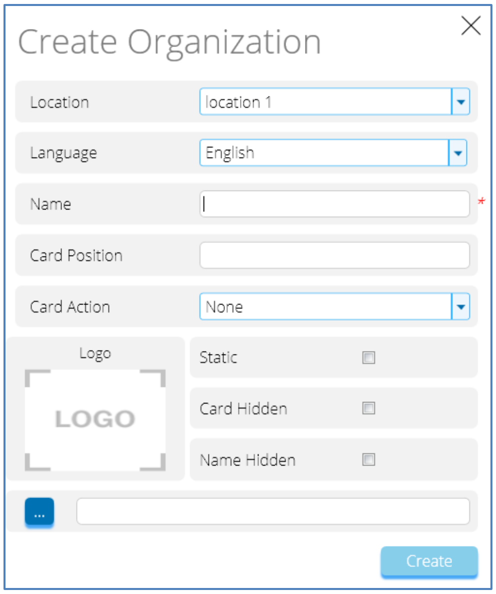
Each Directory you created within your company can contain one or more Organizations. If your ALICE system will be used to only manage one specific grouping of employees, you need only create one Organization. If your ALICE system will manage employees from various groups, companies, or organizations then it is recommended that you create a separate Organization for each grouping that will be listed on the ALICE system.

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 an Organization** button, the Create Organization window will appear.



- **Location:** Choose from the Locations to assign an Organization at that Location.
- **Language (Planned feature):** Select the default language for the Organization
- **Name:** The name of the Organization, company, or select grouping.
- **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.
- **Card Action:** Choose the card action for the Organization
- **Static:** Select this box if you wish this Organization card to be displayed on every screen where the Contact cards are displayed.
- **Card Hidden:** Will hide the card from the Directory Listing
- **Name Hidden:** Will hide the Organization name on the Card.
- **Logo:** Use this field to upload a logo for this Organization. ***The recommended size for these images is 400x130 pixels and should be saved in a .jpg format.***

Click the **Create** button to save changes for the new Location or click the **x** at the top right of the form to cancel and close the form.

Example Company logo image

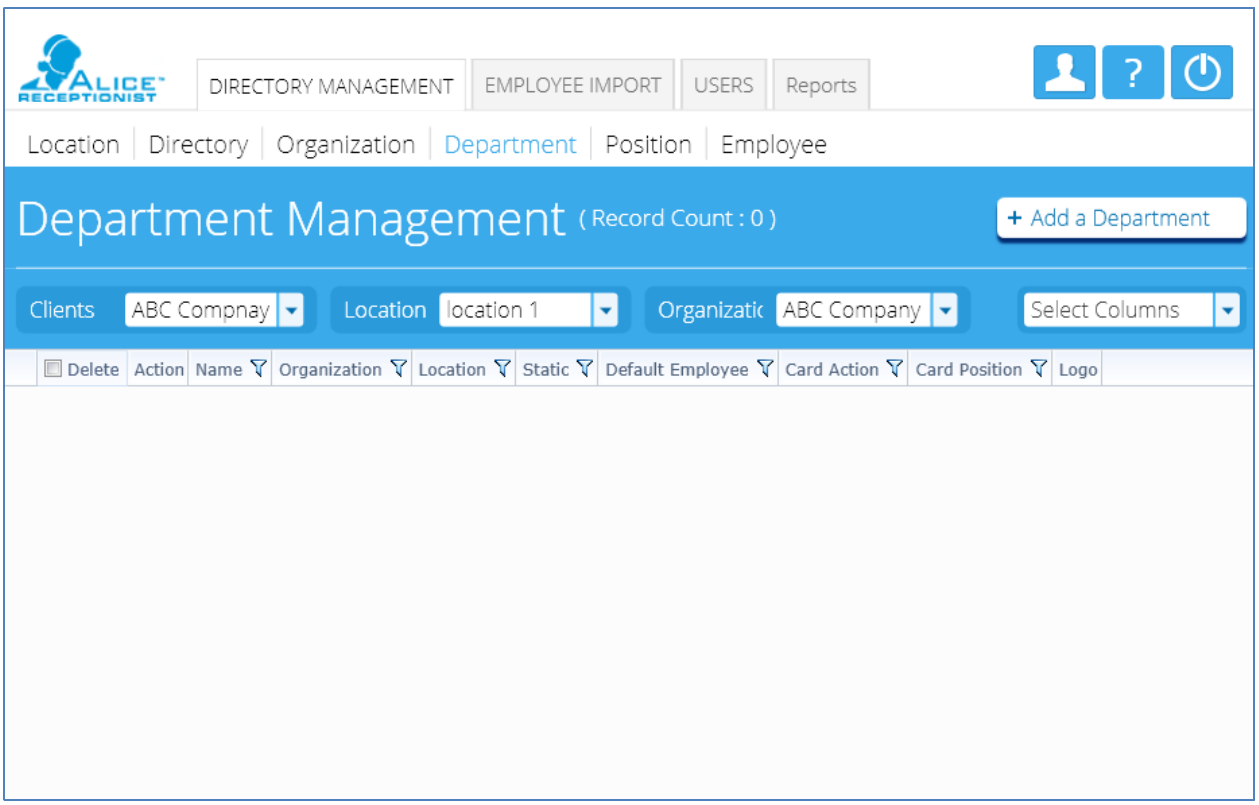
To further customize the information for this Organization which will display on the ALICE Directory, click the **Edit** button from the data grid.

Department Tab

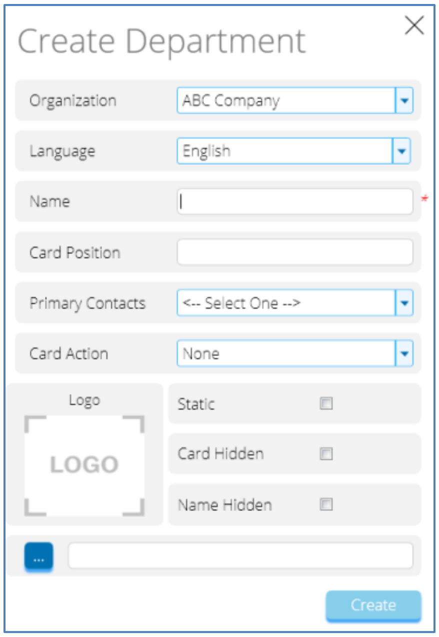
Each Organization you created for your company can contain one or more Departments. Departments are an optional sub-organization category and do not have to be used. They are helpful if you want your Employees to be grouped on your ALICE Directory screen by Department, or if you want to create a list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



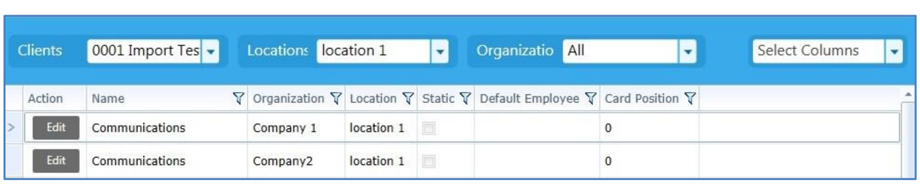
Click the **Add a Department** button and the Create Department form will appear.



- **Organization:** Select the Organization in which this Department exists.
- **Language (Planned feature):** Select the default language for the Organization
- **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.
- **Primary Contacts:** 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 Action:** Choose the card action for the Organization
- **Static:** Check this box to force the card for the Department to remain on every page of the Organization Directory. Its default setting is unchecked.
- **Card Hidden:** Will hide the card from the Directory Listing
- **Name Hidden:** Will hide the Organization name on the Card.

Click the **Create** button to save changes for the new Department or click the **x** at the top right of the form to cancel and close the form without saving changes.

In the future, you can modify or delete an existing Department by clicking on the **Edit** button next to the department name.



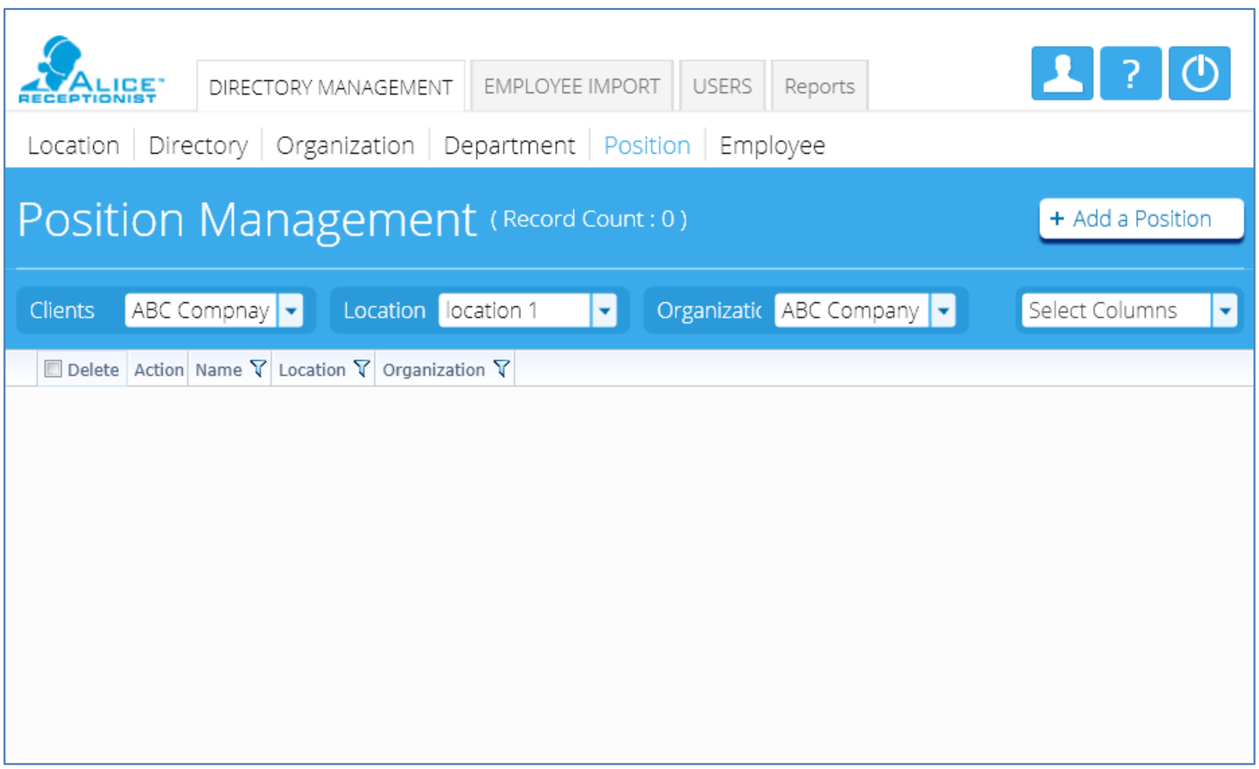
Action	Name	Organization	Location	Static	Default Employee	Card Position
Edit	Communications	Company 1	location 1			0
Edit	Communications	Company2	location 1			0

Position Tab

You are able to create Positions or Titles for each Employee within an Organization. Before an Employee can be assigned a Position or Title, you must create a list of Positions within the 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.

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 a Position button will appear.*

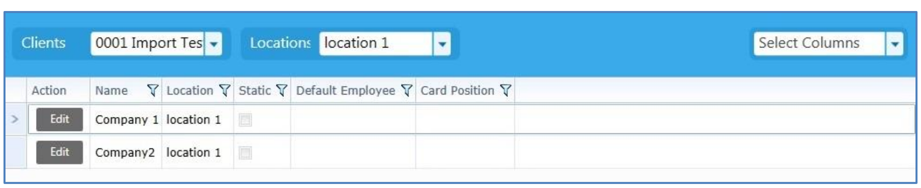


In order to create a Position, simply click on the **Add a Position** button. This will open up a pop up screen allowing you to name the Position.

In the Create Position form, after selecting the Organization where it belongs, Choose the default language (planned feature) and simply type the name of the Position you want to create.

Click the **Create** button to save changes for the new Position or click the **x** at the top right of the form to cancel and close the form without saving changes.

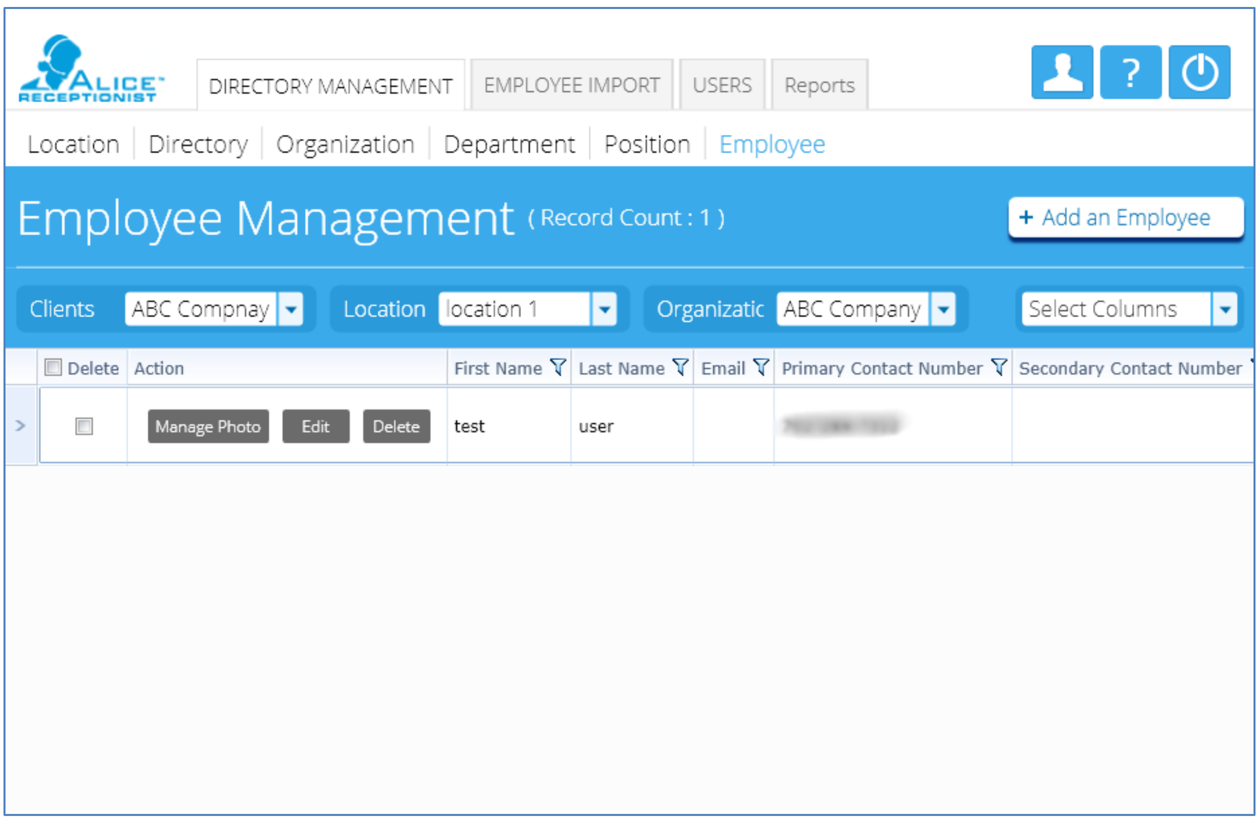
In the future, you can modify or delete an existing Position by clicking on the **Edit** button next to the position name.



Employee Tab

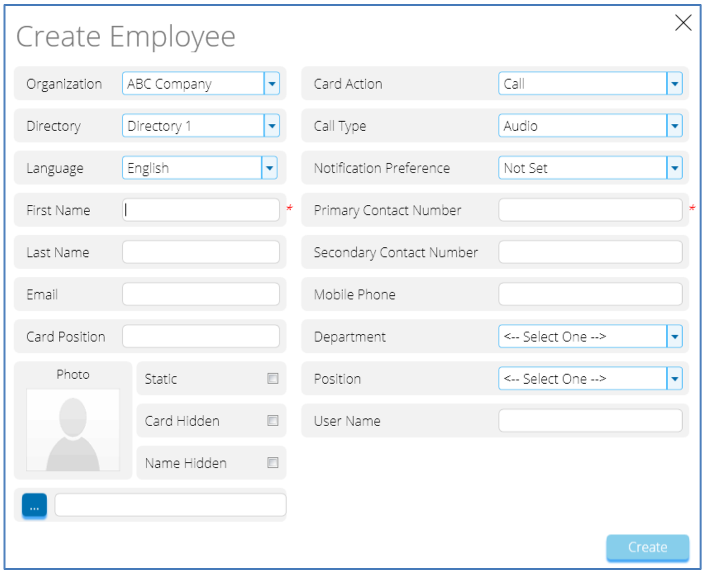
Employees are created using the Add an Employee form, or you can import your own list of employees by using the Employee Import section (See Chapter 5). Each card to be represented on the ALICE Directory screen must be associated with an Employee that has been created in this section.

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 an Employee** at the top of the data grid.

This will open the Create Employee form. Required fields are indicated with a RED * (asterisk) to the right of the field.



- **Organization:** Select from the list of Organizations to assign this Employee to that list on the ALICE Directory.
- **Directory:** Select from the list of Directories to assign this Employee to a particular ALICE Directory.
- **Language (Planned Feature):** Default Language for this employee
- **First Name:** The Employee's first name.
- **Last Name:** The Employee's last name.
- **Email:** The Employee's e-mail address.
- **Card Position:** The number position where this Employee's card should appear on the ALICE Directory. By default, the cards will appear in alphabetical order.
- **Static:** Check this box to cause the Employee's contact card to remain on every screen of the ALICE Directory. The default mode is unchecked.
- **Card Hidden:** If checked the card will be hidden on the Directory
- **Name Hidden:** If checked the Employee Name will be hidden on the Card.
- **Photo:** Used to upload a photo of the employee
- **Card Action:** The Card Action to perform when pressed.
- **Call Type:** The type of call to perform to reach the employee
- **Notification Preference:** The preferred notification method for the Visitor Check-in process to notify the employee of the visitor's arrival.
- **Primary Contact Number:** The preferred method of contact that the ALICE Directory will use to contact the Employee. See **Contact Number / Address** section below for format details for this field.

- **Secondary Contact Number:** Only used for 1-way video calls. Enter the phone number that the ALICE system should call for the audio portion of the 1-way call. If your user is not being configured for 1-way only calling, do not enter any information in this field.
- **Mobile Phone:** The employees mobile phone number, Required if Mobile Phone is selected for Notification Preference above.
- **Department:** Select from the list of Departments to assign this Employee to that list and cause the Department name to appear on the Employee's contact card.
- **Position:** Select from the list of Positions to cause the title to appear on the Employee's contact card.
- **User Name:** The user name will be automatically filled as you enter the Employee's first and then last name.

Click the **Create** button to save changes for the new Employee or click the **x** at the top right of the form to cancel and close the form without saving changes.

In the future, you can modify or delete an existing Employee by clicking on the **Edit** button next to the employee name.

Clients: ACME Co | Locatio: West Main | Organizati: Property Manag | Select Columns

	Action	First Name	Last Name	Email	Primary Contact Number	Secondary Contact Number	Card Position	Static
>	Edit	Fred	Fredericks	fred@acme.com	sip:fred.fredericks@acme.local	774-445-7788		
	Edit	Samantha	Jones	sj@acme.com	sip:Samantha.Jones@acme.local			

Contact Format Requirements

There are various options for how Employees can communicate using the ALICE 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.

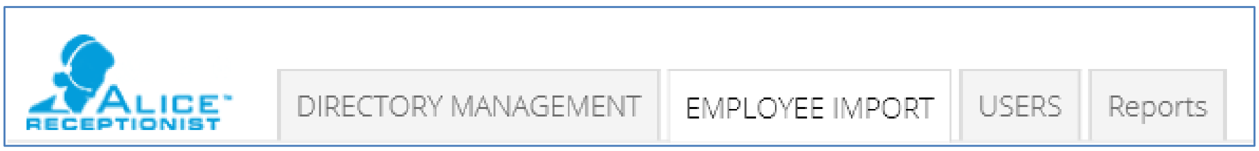
- **3rd Party SIP Softphone users:** "bria_sip:123@na.sipo1.alicereceptionist.com"
    - "**123**" represents the unique extension provided for this user by WinTech.
    - "**na.sipo1.alicereceptionist.com**" represents the URL of the ALICE Cloud Communication server provided by WinTech.

MICROSOFT LYNC UNIFIED COMMUNICATIONS

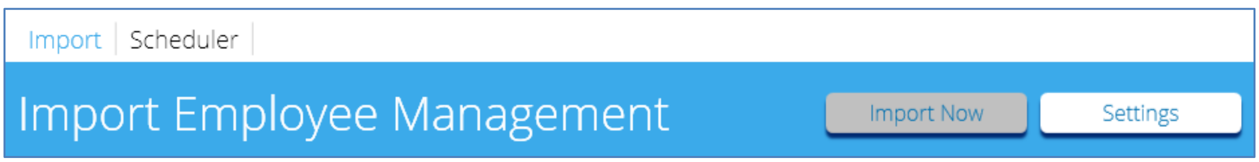
Users who are using Microsoft Lync clients for communication can now communicate with ALICE Receptionist systems using their Lync clients.

Chapter 5: Manual Import

The Admin App provides you the ability to import your ALICE employees from your network's Active Directory or Microsoft Lync database. Click the **Employee Import** tab to get started.

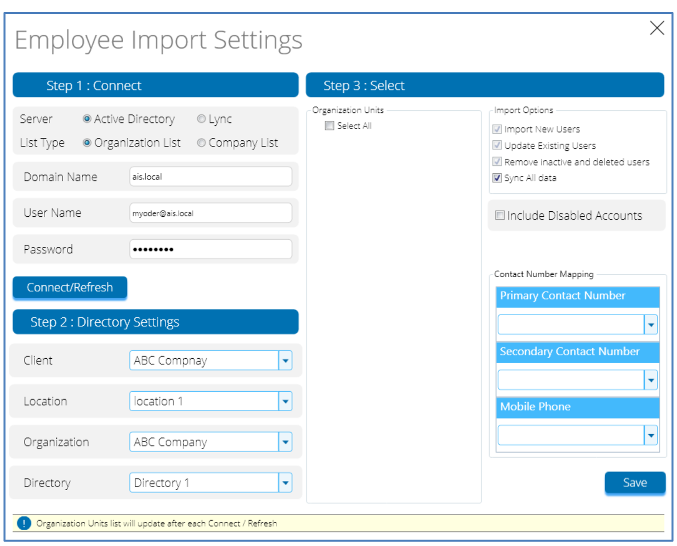


Importing from Active Directory

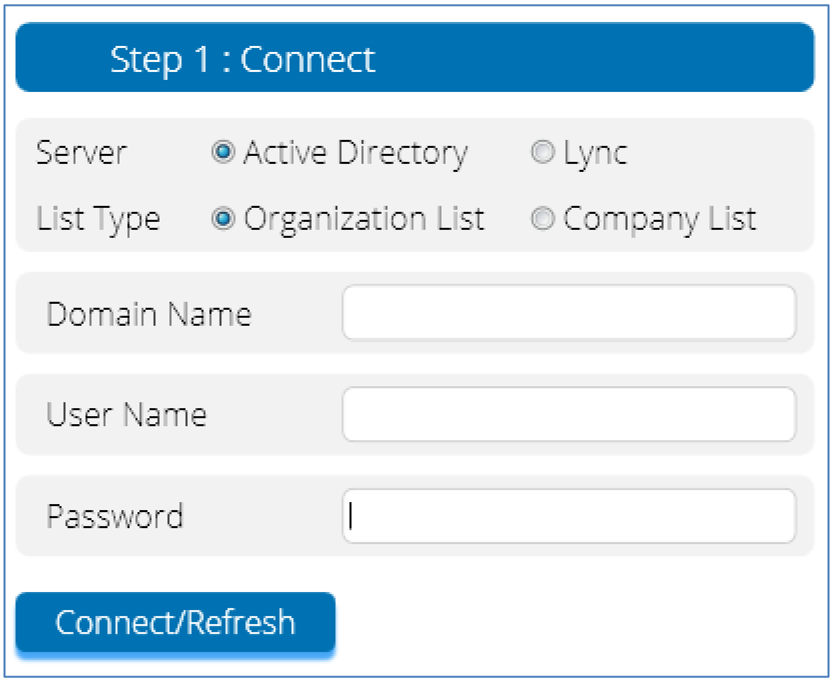


Note that the tab on the top of the content window shows that **Import** is highlighted in blue. This indicates that you are managing the import. In order to manage the Scheduler, click the **Scheduler** tab and see the Scheduler section in this Chapter for instructions.

To begin the process of manually importing Employees, click the **Settings** button on the right of the screen.



Step 1: Connect



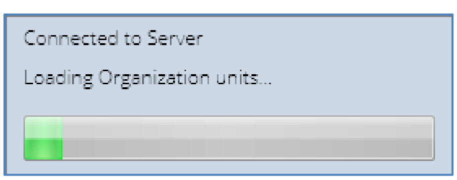
Select the type of import to perform: Active Directory or Lync

Select how you want users organized: Organization Unit (default) or Company List

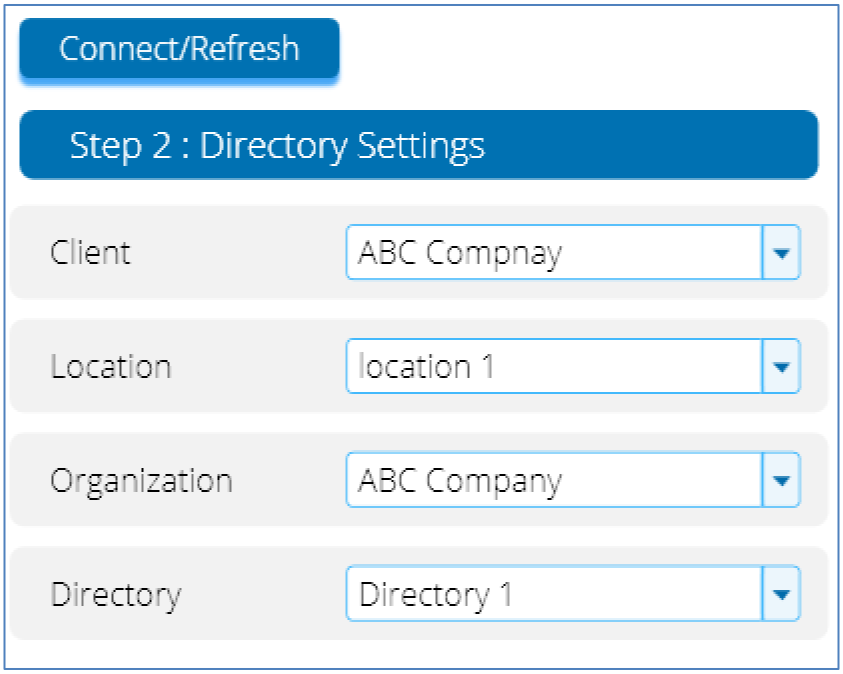
Enter the Domain Name, User Name, and Password for the account you will use to retrieve OU information from the server.

The user account used here should be a network service account and not an existing User's account. The importer will retain these login credentials so it can connect to your server in the future using these same credentials.

Click **Connect/Refresh** in order to bring up your local network organizational unit of employees. If your credentials are correct, a loading window will display on the screen and how progress as the system imports your user data. For companies with a larger number of employees you can expect this process to take some minutes before it completes. You may not see any progress initially, but give it a few minutes and it should start updating the progress bar.



Step 2: Select

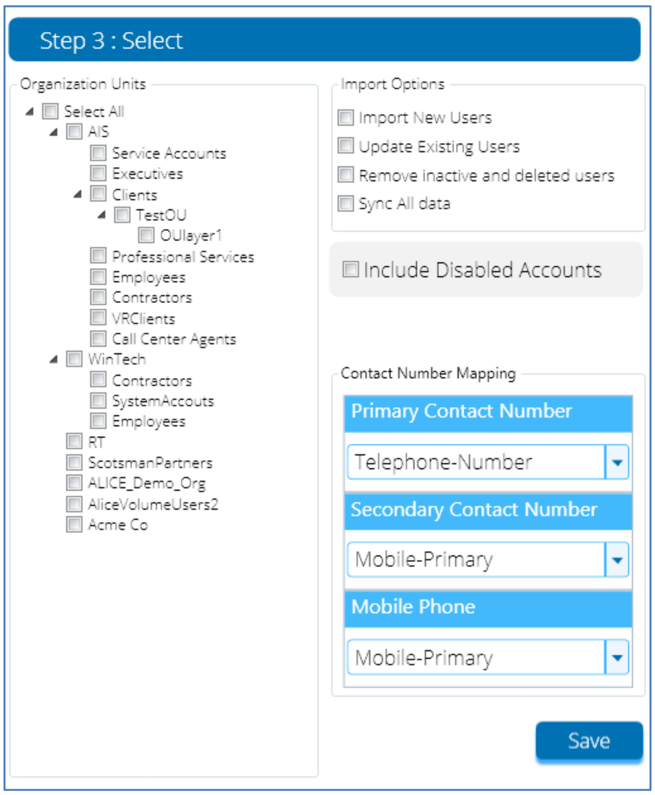


Make the Organizational selections to specify what Directory you are importing these users into. If you only have one Alice Directory within your organization, you will not have to make any choices they will be made for you.

- **Client:** This is not an editable field.
- **Location:** The physical location of the Directory where the employees will be loaded.
- **Organization:** The name of the Organization of which the Employees will be a member.
- **Directory:** The Directory to which the Employee will be assigned.

Step 3:

Next choose all of the Organizational Units that you would like to import. Depending on how your employees are organized, you may have employees listed under different Organizational Units. You can Select All or some of your Organizational Units to import. Once you save these settings you will have the opportunity to filter users for the units you have selected to import.



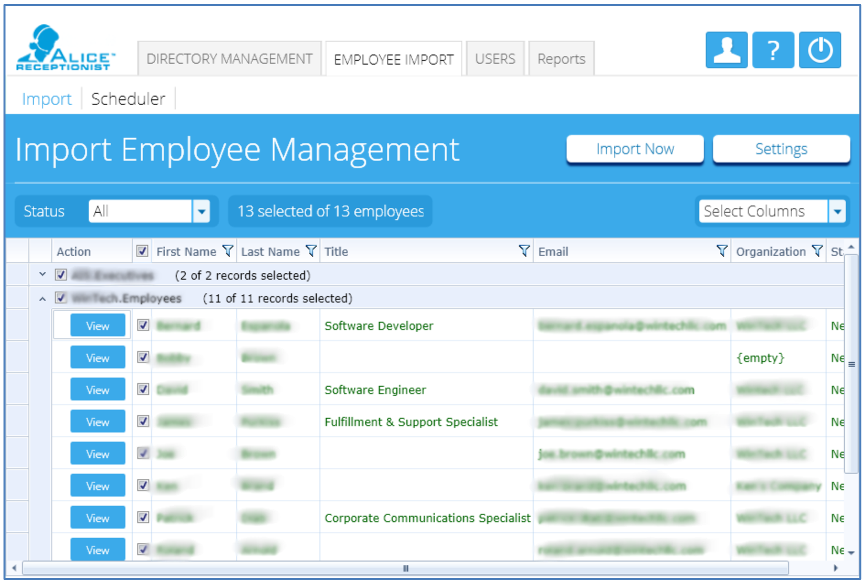
Import Options:

- **Import New Users** Will ADD any employees selected which do not already exist in the ALICE Employee List.
- **Update Existing Users** Will UPDATE any selected employees which have already been added to the ALICE Employee List.
- **Remove inactive and deleted users**. Will DELETE any employees found in the ALICE employee list which are not included in the list of selected employees in the Import list. 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
- **Sync All data:** This is essentially a "select all" of the above options.
- **Include Disabled Accounts:** Choose Include Disabled Accounts if you wish to also include any employees within your database that your local administrator may have disabled but not deleted.

Contact Number Mapping: You can select the fields from to map to the Primary, Secondary and Mobile Phone number.

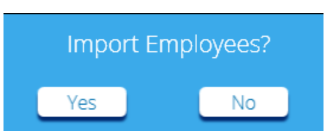
Click **Save** to save your selections.

Your Employee Import screen will now show all Employees grouped by the Organizational Units you selected on the Settings Screen. Those showing in RED signify entries that already exist in your ALICE employee list. Those showing in GREEN do not exist in the ALICE employee list but will be added if checked. You can unselect any individual Employee or Organizational Unit to prevent them from being imported during the import process.



Next, click **Import Now** at the top right of the Manual Active Directory Management data window.

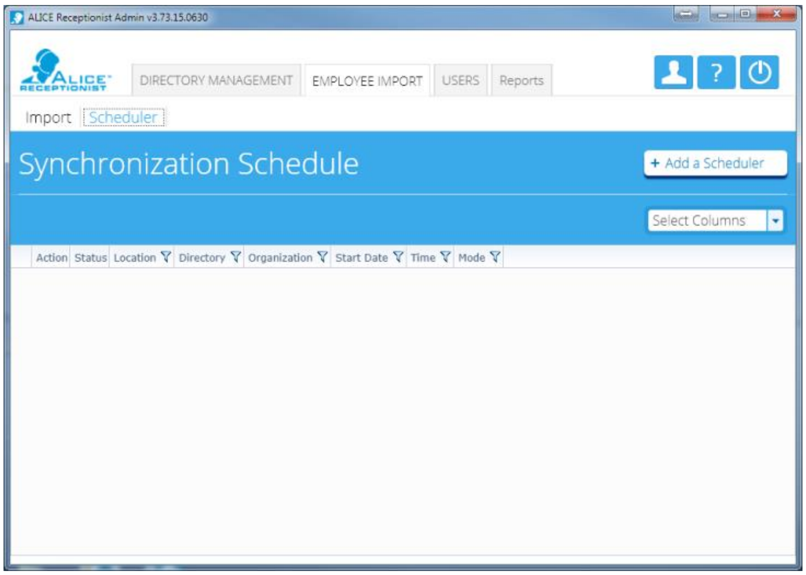
They system will prompt you to confirm you are ready to import these uses:



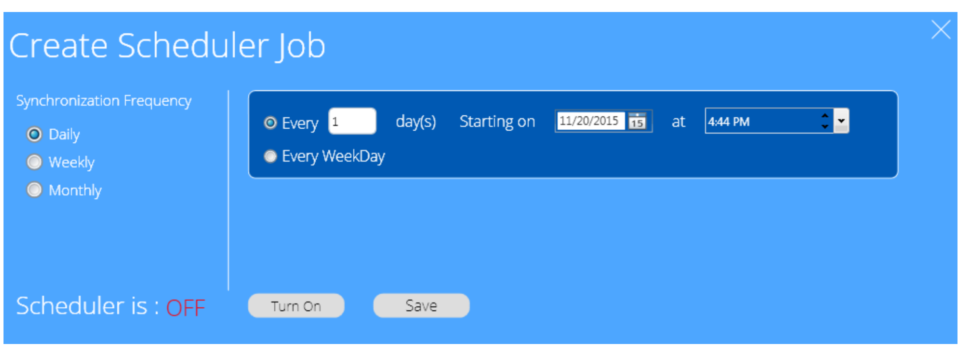
Click **Yes** to initiate the import, or click the **No** to close the form without importing employees. Once the import is complete the system will display a count of any employees that failed to import because if missing data.

Chapter 6: Import Scheduled Jobs

While in the Employee Import window, note that the sub tabs offer “Import” or “Scheduler”. Click **Scheduler** so that it is highlighted in blue. This indicates that you are performing tasks in the Scheduler.

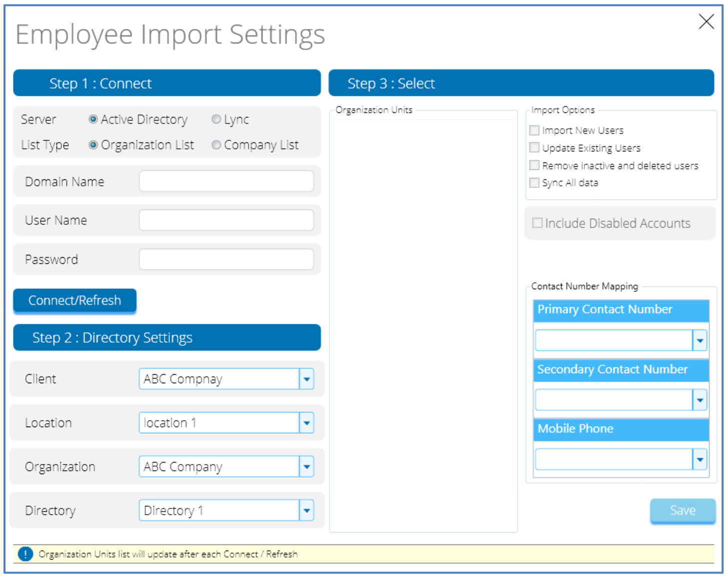


To create a new Import Scheduled Job click the **Add a Scheduler** button. This will open the Create Scheduler Job form. Use this form to create a scheduled import job which can run at a set time daily, weekly or monthly.



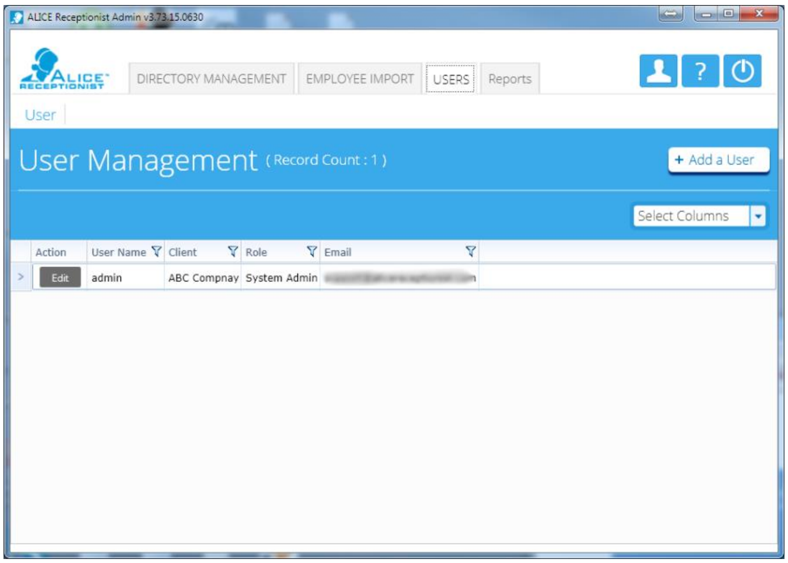
Click the **Turn On** button to turn make the Scheduled Job active.

Each scheduled job can have a unique set of import setting. You must configure the import settings using the same process as described in Chapter 5 for configuring the import settings.



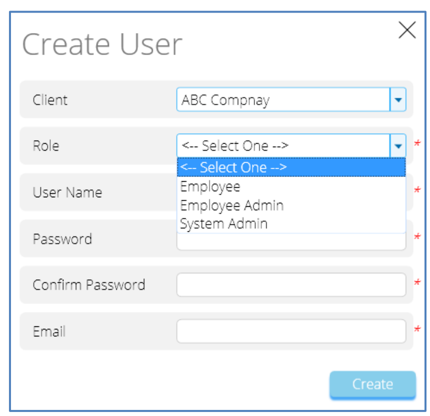
Once your import selections have been saved. You can create additional import jobs or exit the Employee Import screen. Scheduled jobs will automatically run as long as the ALICE Scheduled windows Service is running.

Chapter 7: Users



Additional users can be added and granted full or restricted access to the ALICE Administration application. Click on the USERS tab to access the User Management screen.

To add a new user click the **Add a User** button

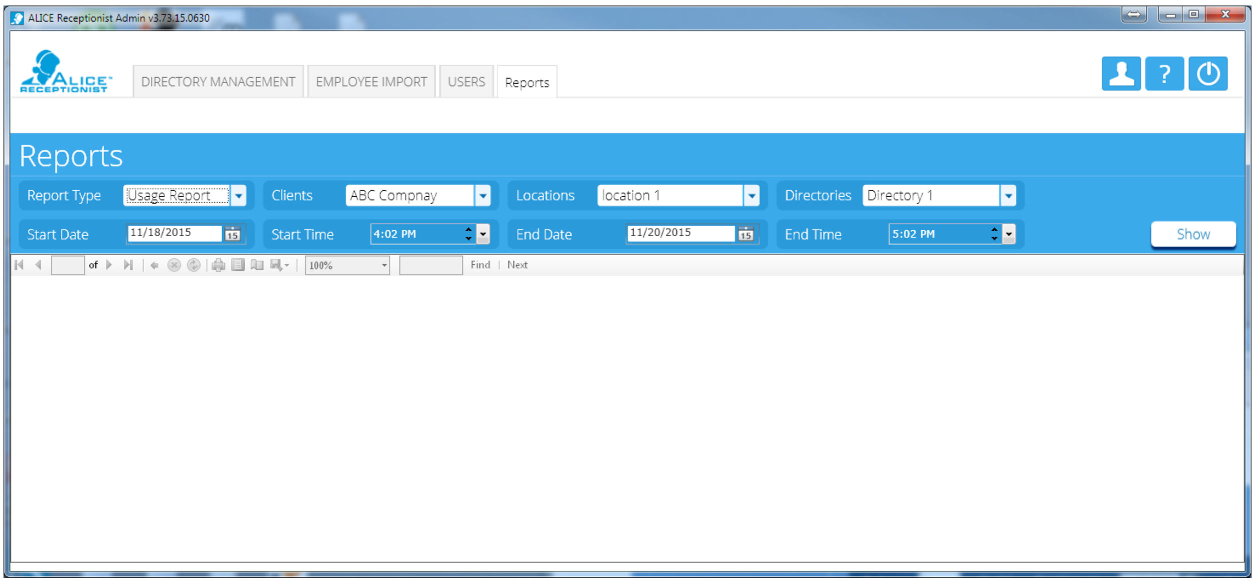


- Role: Select a **Role** for the user. Default roles included:
  - Employee: Access to Directory Management areas
  - Employee Admin: Access to Directory Management and Employee Import areas
  - System Admin: Access to all areas of the Admin application
- User Name: Assign the user a user name
- Password: Assign the user a password
- Confirm Password: Retype the users password to confirm it
- Email: Enter the users email address

Click the **Create** Button to save and create the users account.

Chapter 8: Reports

The Reports section allows the user to view and save reports of data collected from the ALICE Receptionist Directory.

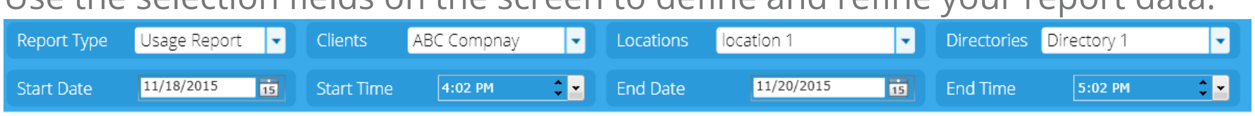


Report Types include:

- Usage Reports: This report display a report of the interactions that visitors have had with the ALICE Directory including which buttons they clicked.
- Call Reports: This report displays a report of all calls made by the ALICE Directory. Data includes time of the call, duration of call and what employee was called.

Additional reports will be added in future product updates.

Use the selection fields on the screen to define and refine your report data.



Click the Show button to run the report based on the values you've entered in the selection fields.

Once the report is shown, use the report control tool bar to navigate, refresh, print and save your report.