

BCM Rls 6.0

Telephony Templates

Task Based Guide

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Telephony Templates

Overview

Telephony Templates provide a convenient method of configuring large ranges of DN's. A Template can be created for and applied to all DN's within a company, or DN's within departments or functional areas. For example, if the BCM system has Contact Centre agents configured, a Template can be created to ensure that all their extensions are set up in the same way, and have the Contact Centre feature codes assigned to buttons.

The Templates are configured by assigning the DN settings found within the Configuration, Telephony, and Active Sets area of Element Manager. Physical and Target Lines are not configurable settings within the Templates.

Telephony Templates are flexible enough to allow extension model variations within each Template. For example, a department may have T7208's and i2002's used by its members. Both these models could be assigned to the Template and have the same Capabilities & Preferences settings, but have different button programming assignments (uniform to each model).

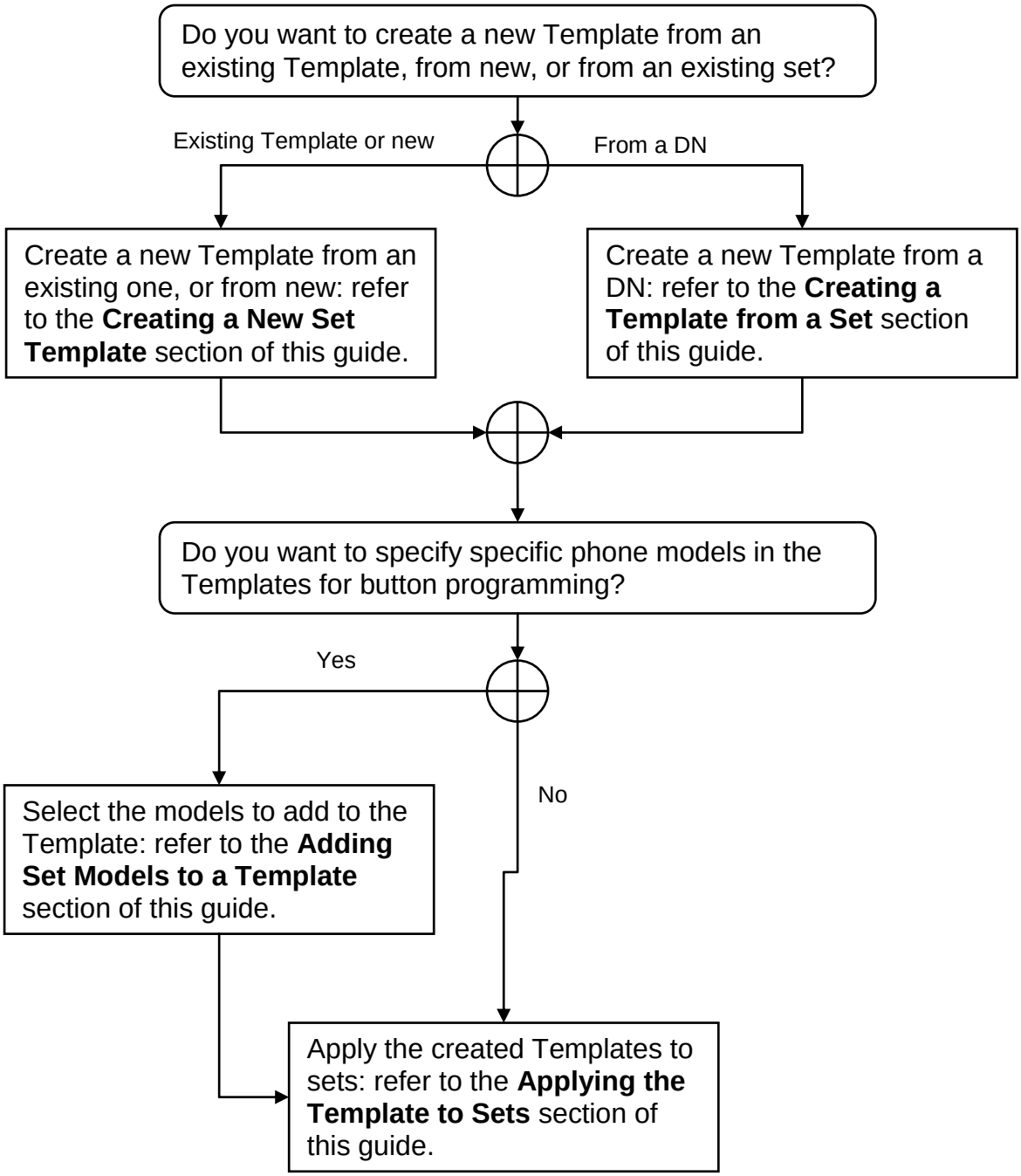
Required Information

Before commencing configuration of the Telephony Templates, it would be useful to obtain the following:

- A good understanding of the DN options within the Configuration, Telephony, and Active Sets area of Element Manager.
- A list of the departments and/or functional areas that require a Template creating for.
- A list of the extension numbers and DN model types to be used for each Template.
- Any button requirements for each DN model type within each Template.

Flow Chart

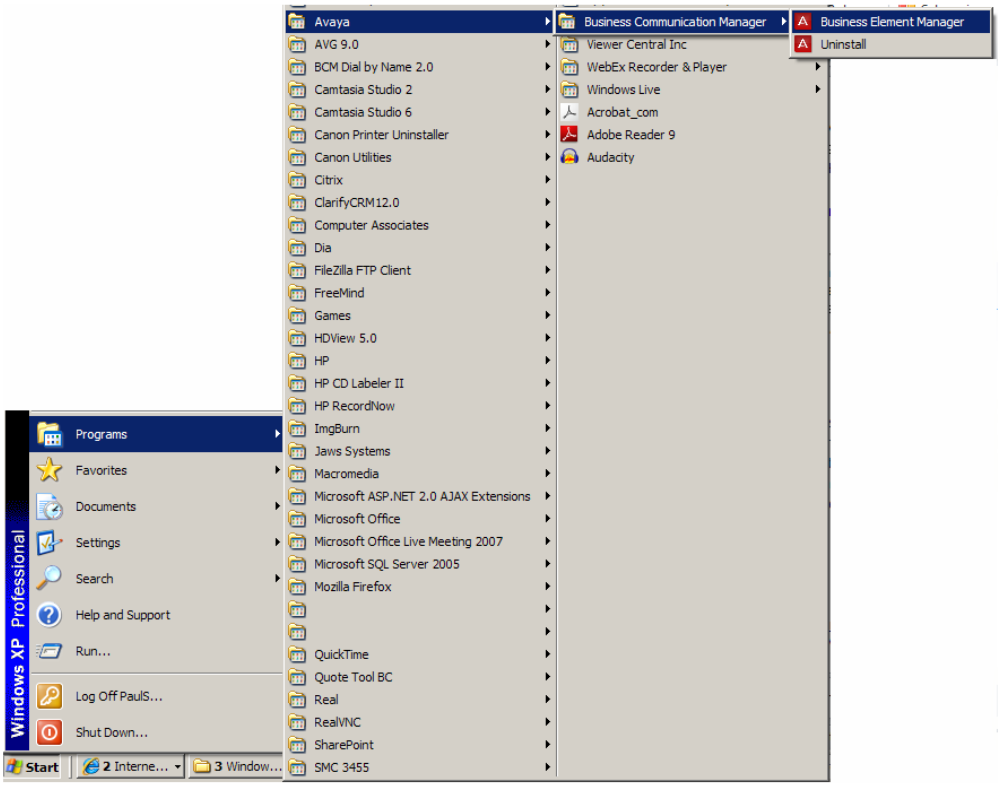
The following flow chart shows the recommended order for configuring and using Telephony Templates.



Accessing Element Manager

Telephony Templates are configured within Element Manager. Use the following procedure to access Element Manager.

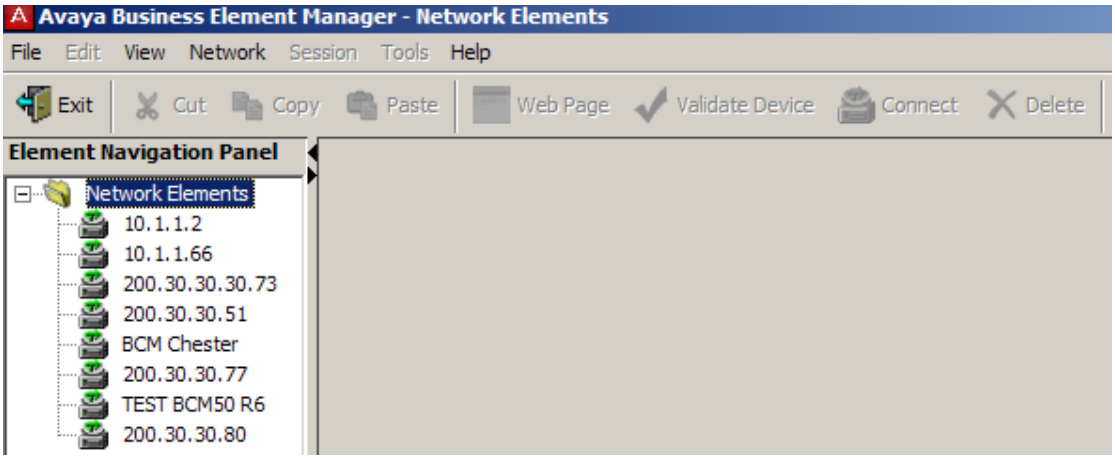
1. To access the Business Element Manager application from the Start Menu, navigate to **Start**, **Programs**, **Avaya**, **Business Communications Manager**, **Business Element Manager**.



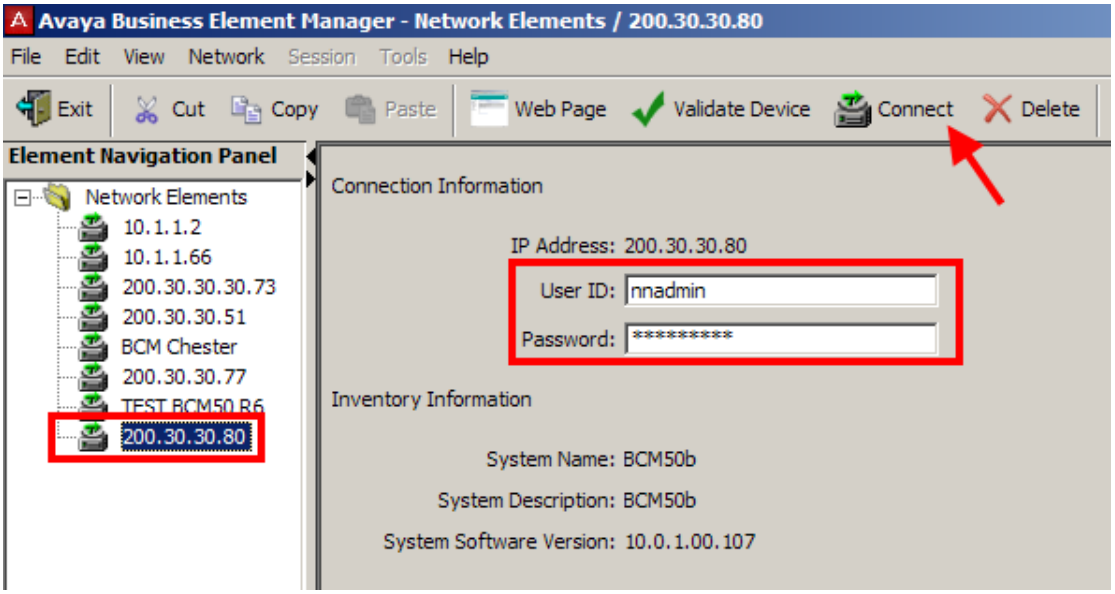
2. Alternatively, double-click on the **Business Element Manager** desktop icon.



3. You will be presented with the **Element Manager** interface.

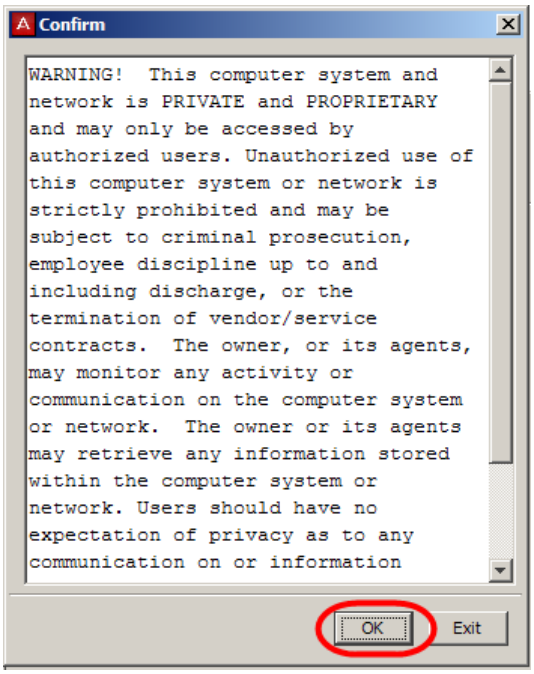


4. Open the **Network Elements** folder and select the IP Address of the BCM.

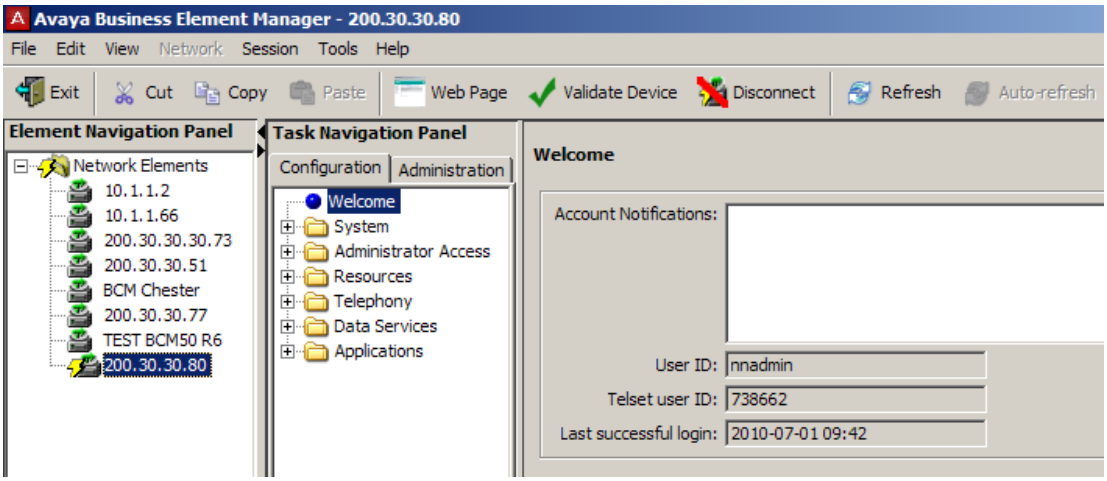


5. Enter the User Name of the BCM in the User Name field, by default this is **nnadmin**. Then enter the Password in the Password field, by default the password is **PlsChgMe!**. Click the **Connect** button.

6. A warning screen will appear, read the warning and click **OK**.



7. You will be presented with the Element Manager interface.



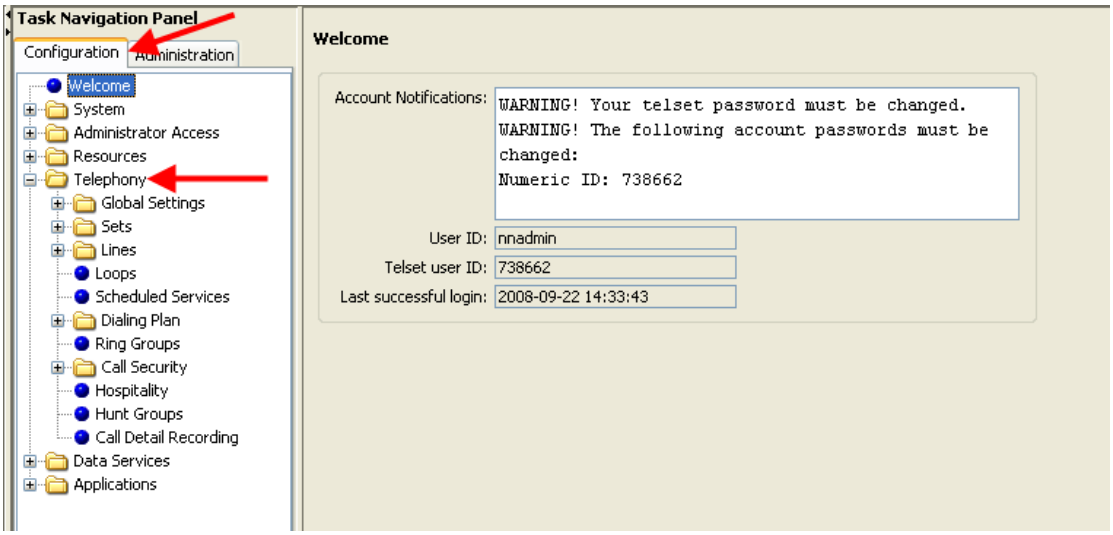
Creating a New Set Template

This procedure describes how to create a new Template from one of the default Templates, or by creating a Template form new.

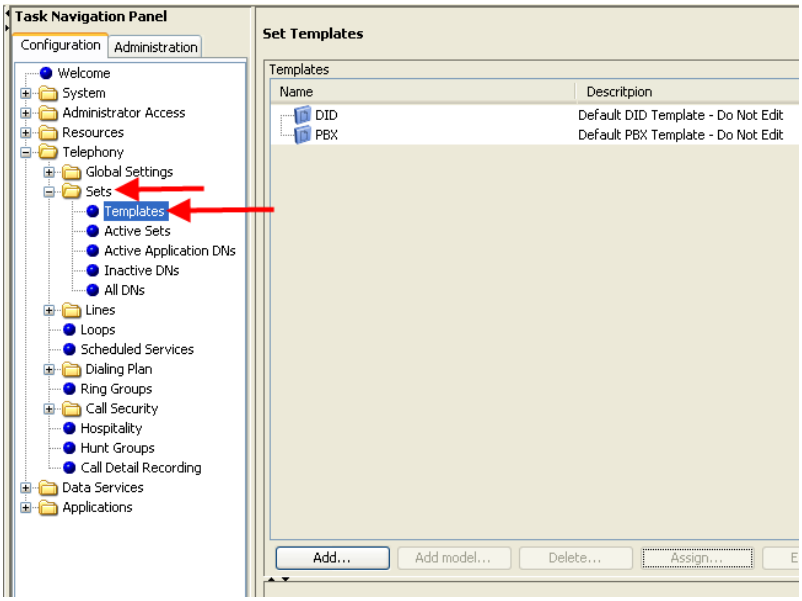
To create a new set template:

1. Launch Element Manager and connect to the BCM.

2. Select the **Configuration** tab, open up the **Telephony** tree.

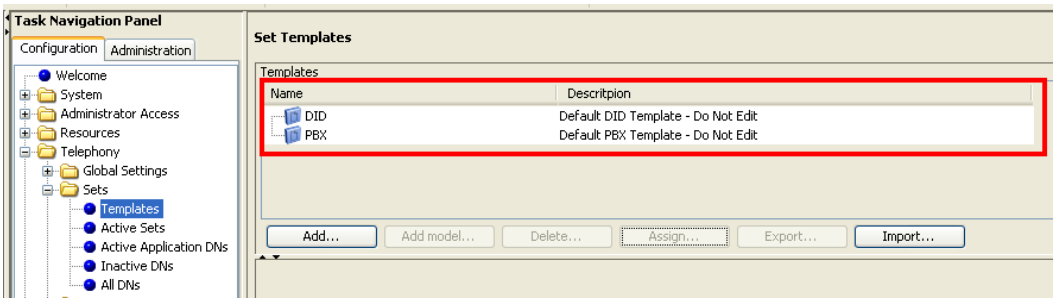


3. Open the **Sets** folder and select **Templates**.



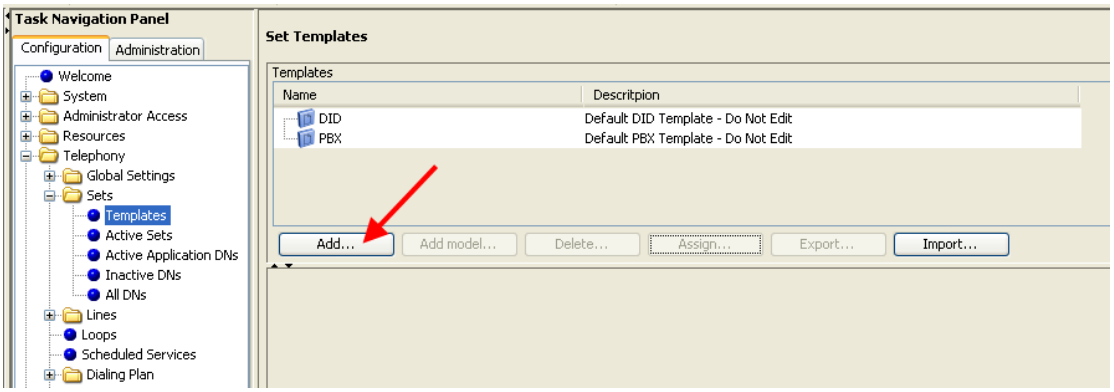
4. On the right panel two default Templates will be displayed. These templates are created during the initialization of the BCM and should **not** be changed. The default templates are:
    - PBX
    - DID

Note: The BCM supports a maximum of 30 templates. This figure includes the two default templates (PBX and DID).

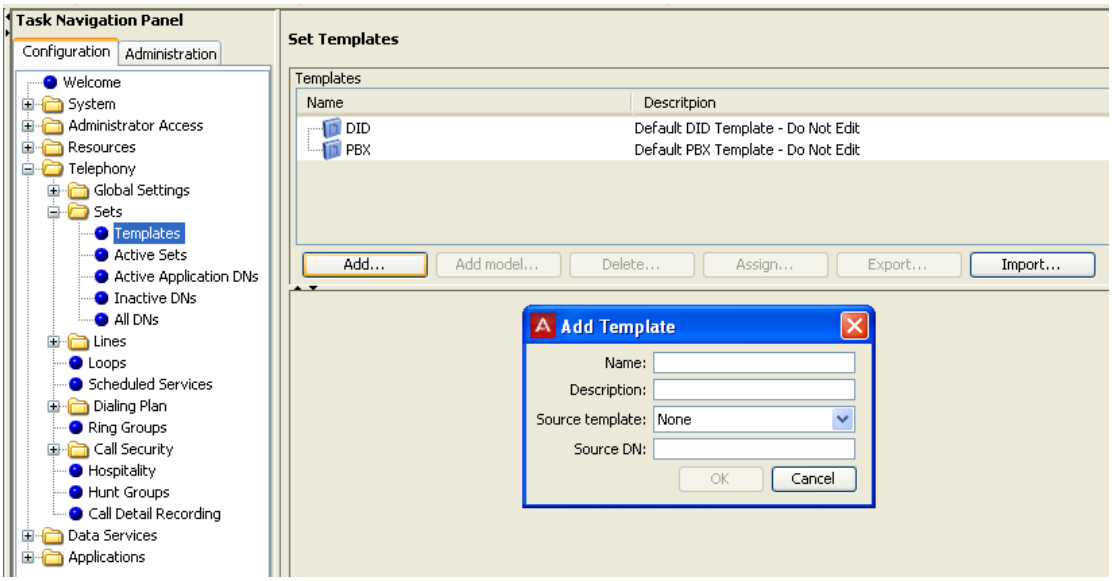


5. An original new template can be created or an existing template can be selected upon which to base the new template.

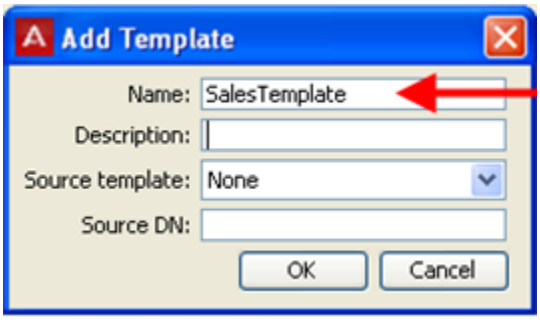
6. In this example a new set template will be created. Click the **Add** button.



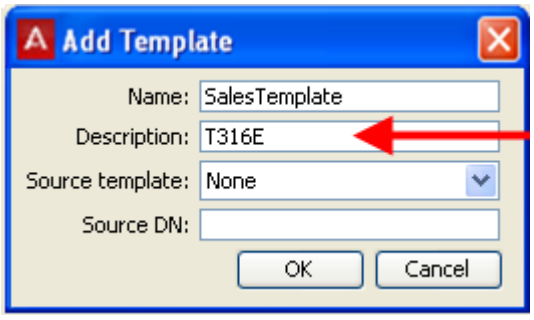
7. The **Add template** window will be displayed.



8. In the **Name** field, enter a name for this template.

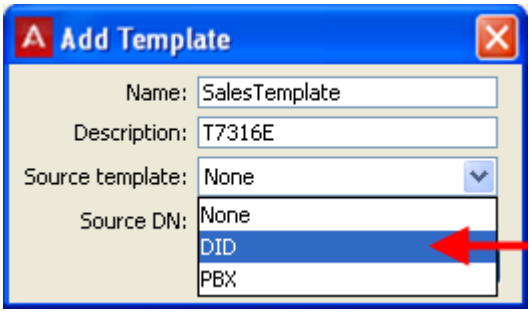


9. In the **Description** field, enter a description for the template.

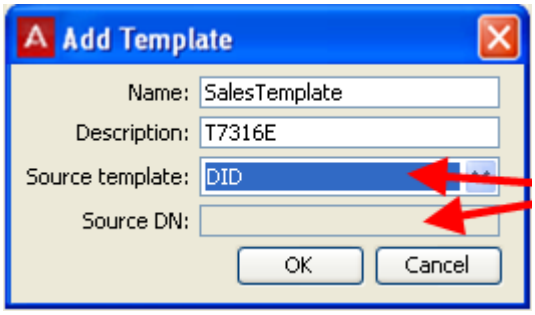


10. From the **Source template** list, select **None** to create an original template or select another template type as the basis for your new template.

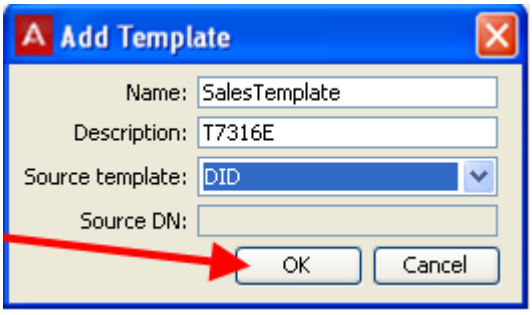
11. In this example **DID** has been selected as this new template is to be configured based on the original DID template settings.



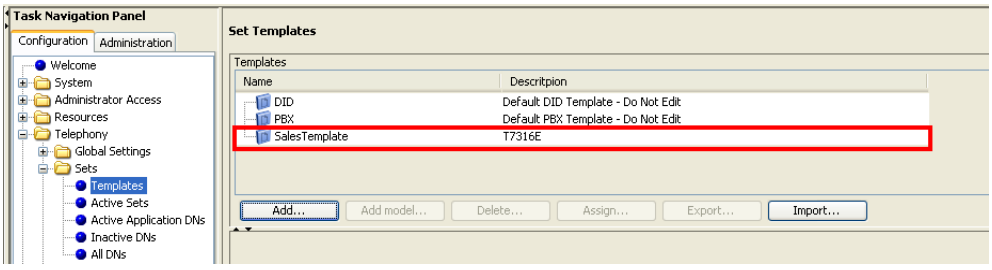
12. If you choose to base your template on an existing template, the Source DN field is disabled because the source DN is taken from the source template.



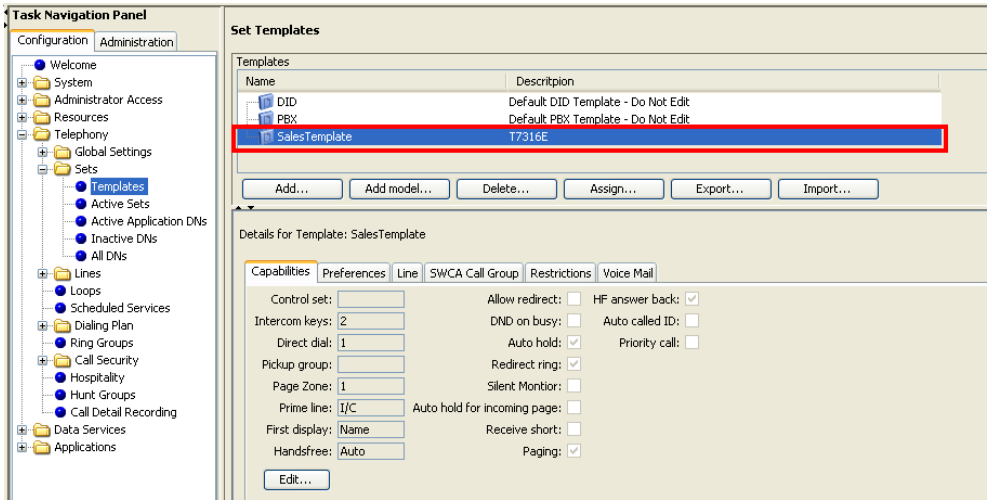
13. Click **OK**.



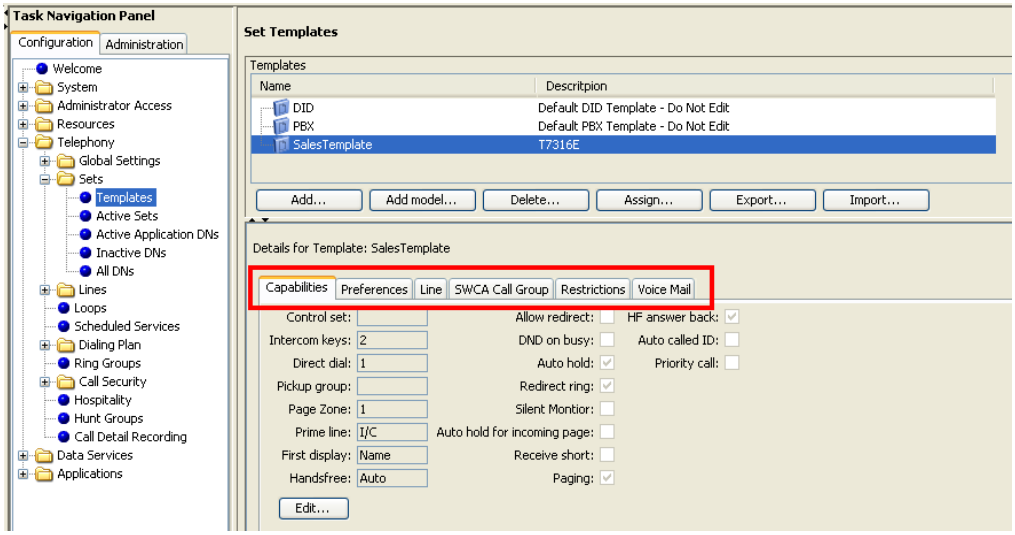
14. The new template will be displayed in the **Templates** panel.



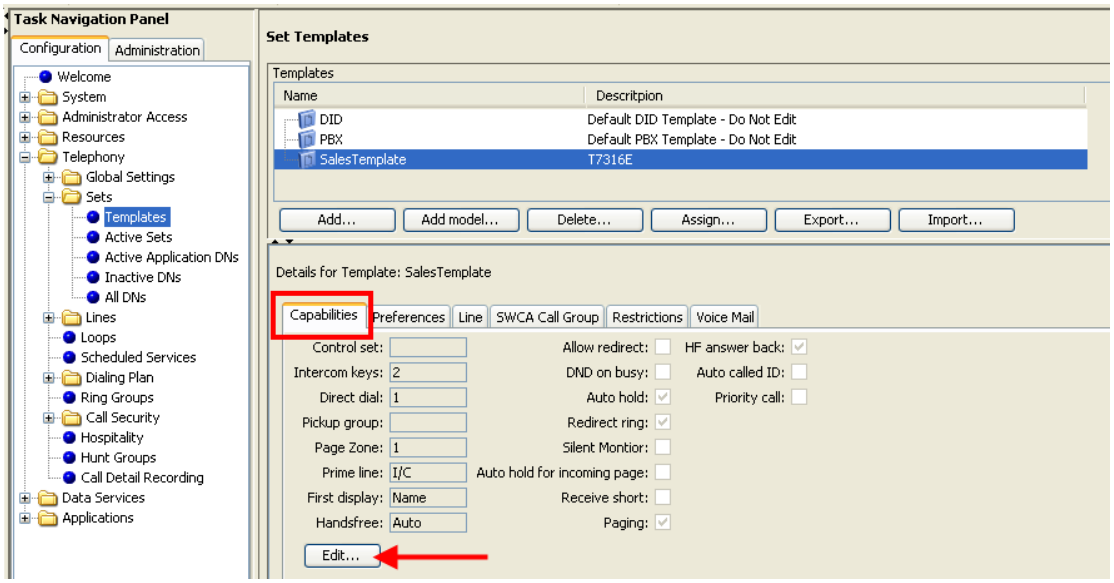
15. Select the template that has just been created.



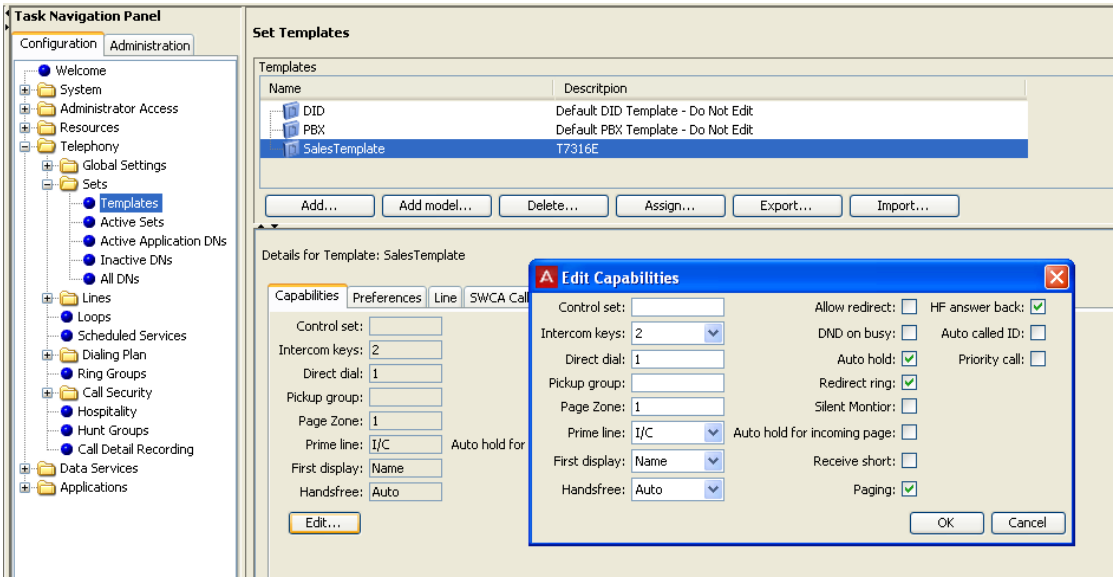
16. When the template has been selected, 6 tabs will be displayed in the lower panel.



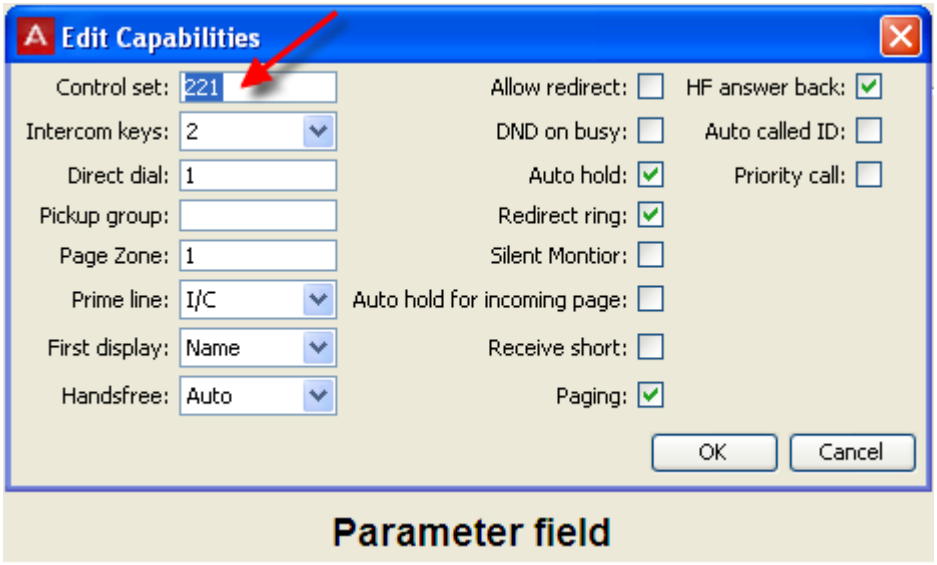
17. To edit the details of the template, select the required tab, for example **Capabilities**, and click the **Edit** button.



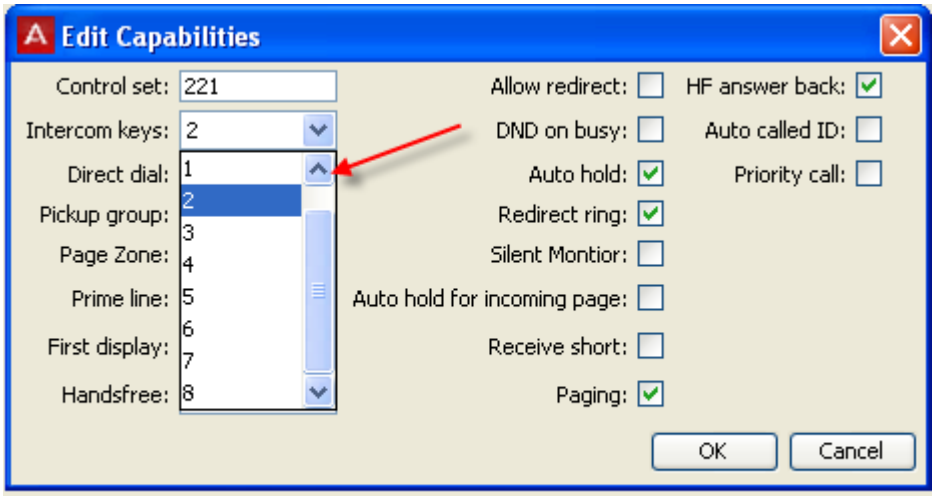
18. In this example, the **Edit Capabilities** window will be displayed.



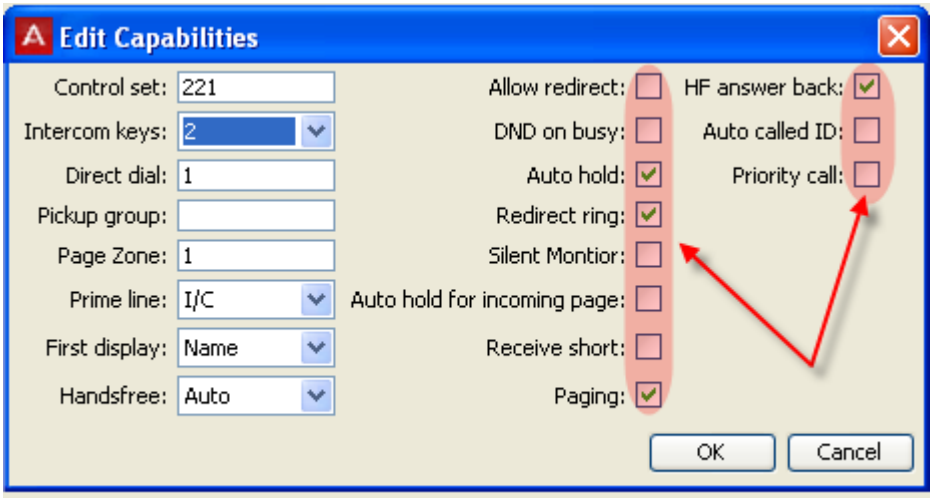
19. The **Capabilities** for the template can be configured. The parameters can be selected by entering details in a specific field, selecting an option from a drop down list or selecting a parameters checkbox.



Parameter field

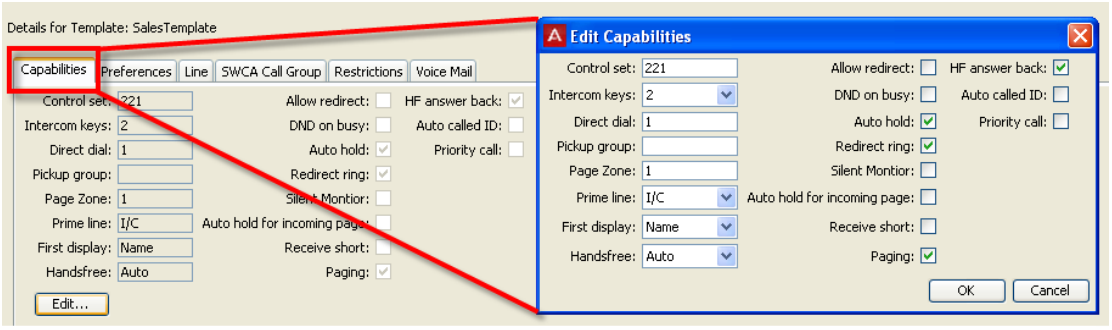


Drop Down List Selection



Parameter Check Boxes

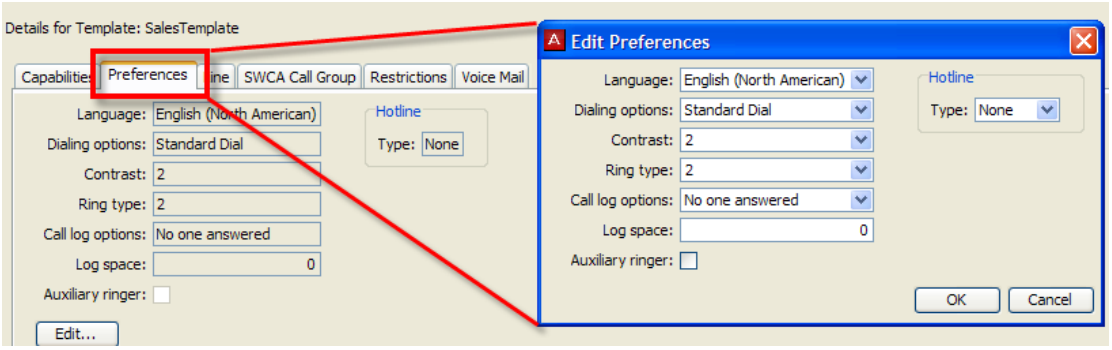
Capabilities Tab



Attribute	Values	Description
Control set	DN <control telephone DN> (default start DN)	Enter a telephone DN for a telephone that you want to use to turn service off or on for other telephones or lines configured in Scheduled Services.
Intercom (I/C) keys	0 to 8	Assign the number of intercom buttons to a telephone. Intercom buttons provide a telephone with access to internal and external lines, and line pools.
Direct dial	Set 1 to Set 5 None	Defines whether you can call the Direct-dial telephone from this telephone using the Direct-dial digit.
Pickup group	None, 1 to 9	Assigns this telephone to a pickup group.
Page zone	None 1 to 6	Assigns this telephone to a page zone.
Prime line	None, Pool (A to O), I/C (intercom), Line: <line number>	Choose the first line that the telephone selects when a call is made. PRI pools are not valid selections for a Prime line. When you assign a line pool as a prime line, the system searches automatically for an idle line in the pool.
First display	Name Number Line	Determine what call display information appears first. This feature depends on what services you subscribe to. Call Display information may contain the name of the caller, the number of the caller, the name of the line in your Business Communications Manager system that the call is on, or all. For each telephone, you can determine what information displays first.
Handsfree	Auto Standard None	**None**: The handsfree feature is not available to this telephone. **Standard**: The handsfree feature is activated by pressing a button on the telephone. **Auto**: The handsfree feature is activated when the telephone receives a call.
Allow redirect	<checkbox>	Defines whether the line to this telephone can be redirected. This must be set to Y to allow call forwarding outside the network (external call forward).
DND on busy	<checkbox>	Defines whether an incoming call rings if you are already on another call.
Auto hold	<checkbox>	This setting determines if the system will automatically put an active call on hold if you answer or initiate another call. If you choose No, the system will drop the active call if you answer or initiate another call, unless you press the Release button. The user can change the Auto Hold setting using Feature 73 on the telephone.

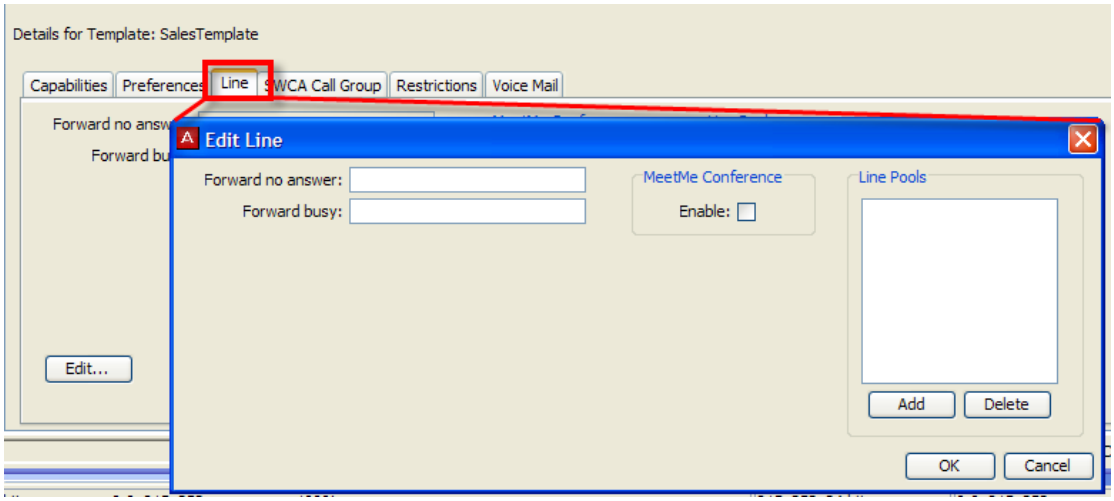
Attribute	Values	Description
Redirect ring	<checkbox>	Defines whether the telephone rings briefly when a call on one of its lines is redirected by the Line Redirection feature (Feature 84.).
Silent Monitor Supervisor	<checkbox>	On two-line display telephones only, you can choose whether the telephone can be used to allow the Silent Monitor feature (*550).
Auto Hold for Incoming Page	<checkbox>	N = if the telephone is active when a page comes in, the page will be put on queue until the user hangs up Y = if the telephone is active when a page comes in, the call is automatically put on hold and the page proceeds. Note: Business Series Terminals (BST) telephones: • Condition: This setting is Y, active call on mute when the page comes in. • Results after page: the call comes off hold, but is no longer muted.
Receive short tones	<checkbox>	Analog equipment that is connected to the system with an analog terminal adapter (external or internal), responds only to tone dialling signals. If you have analogue equipment connected to an extension, set Receive short tones for that extension to Yes. Otherwise, leave Receive short tones set to No.
Paging	<checkbox>	Defines whether you can make paging announcements from this telephone.
HF answerback	<checkbox>	Defines whether you can automatically answer a voice call without lifting the receiver or pressing the Handsfree/Mute button.
Priority call	<checkbox>	Defines whether this telephone can interrupt calls or override Do Not Disturb at another telephone.
Intrusion Protection level	None Low Med High	If the break-in feature is allowed on any private network MCDN lines (PRI SL-1) assigned to the telephone, you must define the level of intrusion for each telephone. This determines if the user can use the feature, and to what degree. None: feature is turned off, user cannot break in on any calls Low: user can only break into calls on other telephones with low level protection Med: user can break into calls on other telephones with low and medium-level protection High: user can break into calls on all other telephones with this feature Default: None

Preferences Tab



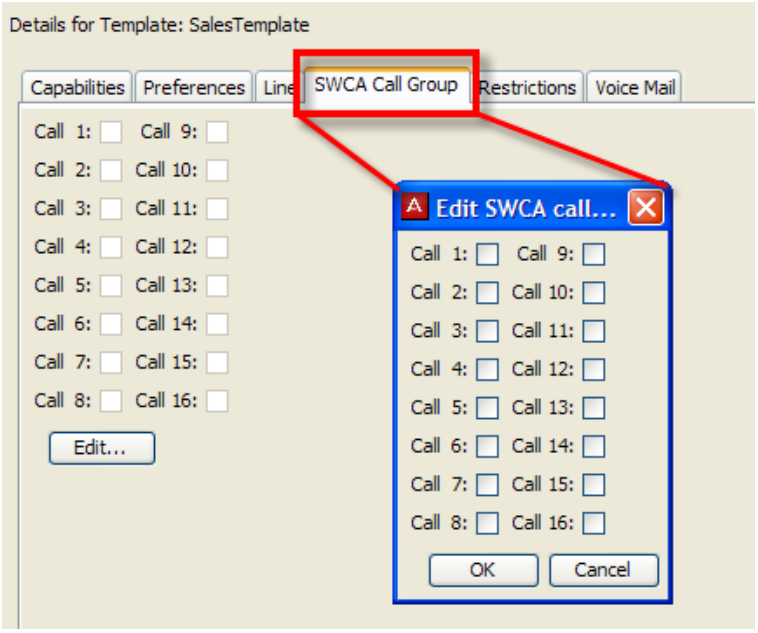
Attribute	Values	Description
Language	Languages displayed are based on telephone capabilities and system software	Choose the language for the telephone display prompts.
Dialing options	Standard dial pre-dial automatic dial	Select how you want the telephone to handle information you dial into it. **Standard:** Pick up the receiver and dial. **Pre-dial:** Dial the numbers, then pick up the receiver to allow the telephone to dial the number. **Automatic dial**: Use for devices like fax machines where you want the number to dial out without external cues.
Contrast	1, 2, 3,4, 5.....9	Adjust the contrast of the display.
Ring type	1, 2, 3, 4	Select a ring pattern for the set. Default is 1.
Call log options	Log all calls, No auto-logging, No one answered Unanswered by me	Select how you want the telephone to handle logging calls. Log all calls: All calls are noted in the call log. No auto-logging: No calls are automatically logged. No one answered: Unanswered calls are not logged. Unanswered by me: Unanswered calls are not logged.
Log space	<value>	Enter the number of calls to keep in the log memory.
Aux. ringer	<checkbox>	Determine whether an auxiliary ringer (if installed) rings for incoming calls at this telephone. Digital Doorphone note: Before you install the hardware, ensure this is setting is not selected in the DN record you want to use for the doorphone.
Hotline	None Internal External	Select the Hotline functionality required (extension dials destination on lifting handset) None: The telephone does not automatically dial any number. Internal: Define the internal telephone you want to access. **Direct dial set:** Will automatically dial a telephone on the system defined as a direct dial telephone. **DN:** the DN of the telephone that gets automatically dialled when the user picks up the handset. External: Select the facility that the outgoing call will use. Enter the complete number for the external telephone you want to access. May require a routing code depending on setup.

Line Tab



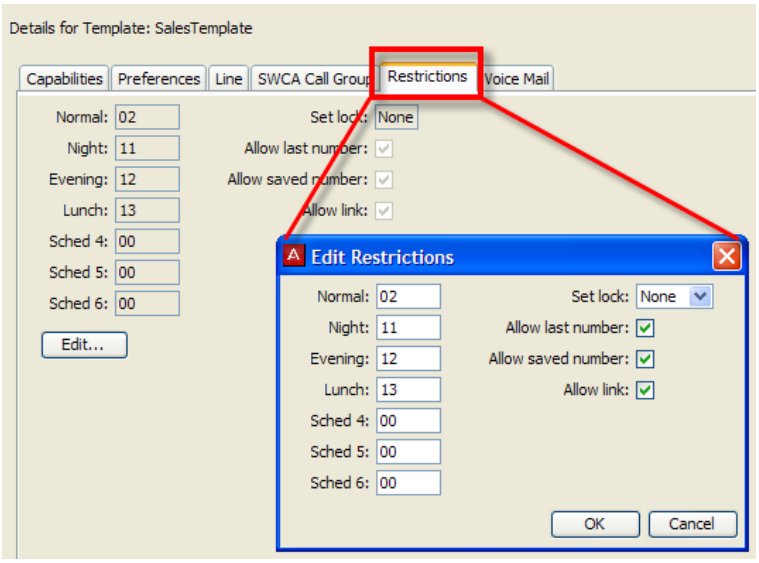
Attribute	Values	Description
Fwd no answer to	Up to 24 digits	Enter the number to which you want to redirect unanswered incoming calls
Forward Delay	2,3,4,6,10	Define the number of rings before the system forwards an unanswered call. Only displayed if Forward no Answer is configured.
Fwd Busy	Up to 24 digits	Redirect Incoming Calls when the telephone is busy with another call
MeetMe Conference - Enable	Yes No	Enables or disables the MeetMe Conferencing feature.
Class of Service	1 - 16	Only displays if MeetMe Conferencing is enabled. Select the MeetMe Class of Service (refer to the ***MeetMe Conferencing Guide*** for more information about this feature).
Line Pools	A – O, BlocA – BlocF	Select which Line Pools the extensions should have access to.

SWCA Call Group



Refer to the **SWCA** section of the ***Telephony Services Guide*** for information concerning SWCA.

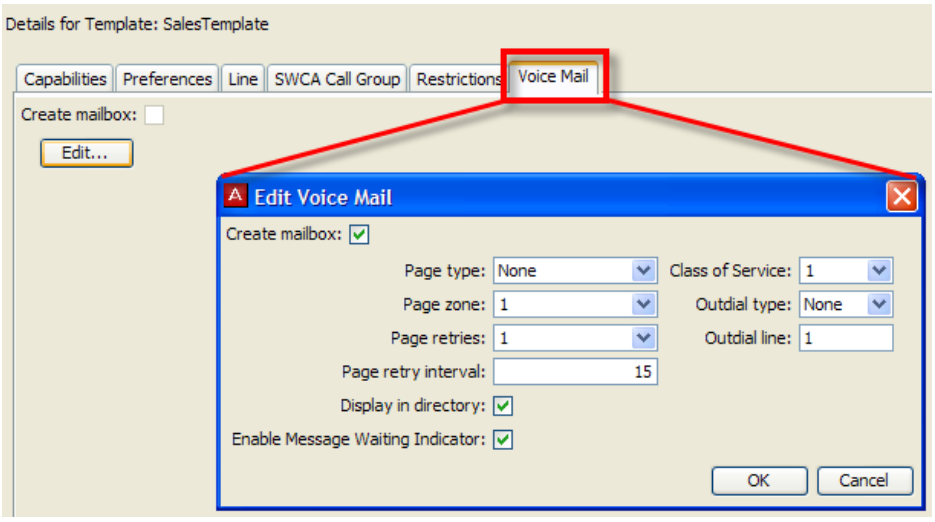
Restrictions



Setting	Values	Description
Normal	00 – 99	Enter the Restriction Filter to use for this schedule.
Night	00 – 99	Enter the Restriction Filter to use for this schedule.
Evening	00 – 99	Enter the Restriction Filter to use for this schedule.
Lunch	00 – 99	Enter the Restriction Filter to use for this schedule.
Sched 4	00 – 99	Enter the Restriction Filter to use for this schedule.
Sched 5	00 – 99	Enter the Restriction Filter to use for this schedule.
Sched 6	00 – 99	Enter the Restriction Filter to use for this schedule.
Set lock	None	Choose the option that sets the amount of customizing the user can do with this telephone. **None** allows access to all features.

Setting	Values	Description
	Partial	**Partial** prevents: • programming autodial buttons • programming user speed dial numbers • programming feature buttons • moving line buttons • changing the display language • changing dialling modes (Automatic, Pre-, and Standard • using Voice Call Deny • saving a number with Saved Number Redial
	Full	**Full** restricts all the Partial settings, plus: • changing Background Music • changing Privacy • changing Do Not Disturb • using Ring Again • using Call Forward all calls • using Send Message • using Trunk Answer • activating Services
Allow last number	<checkbox>	Allows or disallows access to the Last Number Redial feature.
Allow saved number	<checkbox>	Allows or disallows access to the Saved Number Redial feature.
Allow link	<checkbox>	Allows or disallows access to the Link feature, which is a host signalling option.

Voicemail



Attribute	Description
Create Mailbox	Creates a mailbox for assigned DN's, & applies associated settings.
Page Type	Select the required paging type facility. The choices are Internal Zone, Overhead Paging, Both or None. The default is none.
Page Zone	Select the Paging Zone to which the paging announcement will be played. The zones available are zone 1, 2, 3, 4, 5, 6 or All. The default is 1. If the paging type is overhead paging this setting is ignored.
Page Retries	Select the number of page retries to be played to the Page Zone from the box select 0, 1, 2, 3, 4 or 5. The default is 1.
Page retry interval	The Retry interval is the number of seconds between paging retries. The range is 5-300 seconds. The default is 15 seconds.

Attribute	Description
Display in Directory	Clear this if you do not want the mailbox owner's name to appear in the Company Directory.
Enable Message Waiting	Clear this if you do not want message notification to appear on the mailbox owner's telephone display.
Class Of Service	Class of Service assigned to the mailbox.
Outdial Type	This setting provides an external access resource for certain mailbox features. Outdial is required for features such as Reply, Off-Premise Notification, Outbound Transfer etc. • select **None** if you do not want to assign outdialing capabilities • Select **Line** and type the line number. Line numbers must be between 1 and 500. • Select **Pool** and type the line pool number or letter. Select **Route** if, for example routing is used to access a PRI line pool.
Outdial Line	• If Line or Pool are selected as the Outdial Type, specify which resource CallPilot should use to dial out.

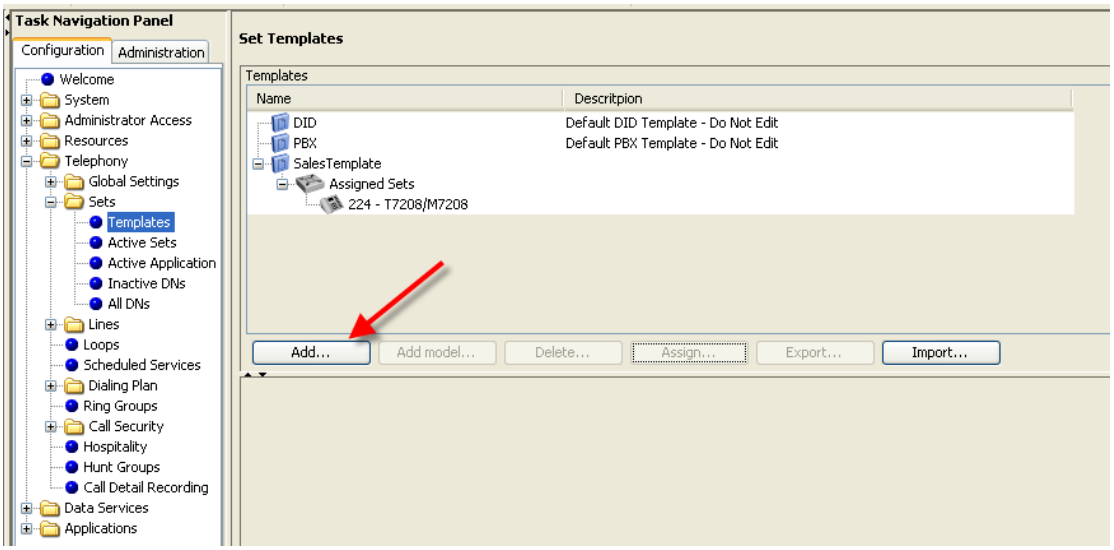
20. When you are satisfied that the parameters for each tab have been configured to your requirements, click the **OK** button at the bottom of the **Edit…** window.

21. Specific DN models can now be assigned to the Template if required (refer to the **Adding Set Models to a Template** section of this guide). After any required set models have been added, the Template can be applied to the BCM sets (refer to the **Applying the Template to Sets** section of this guide).

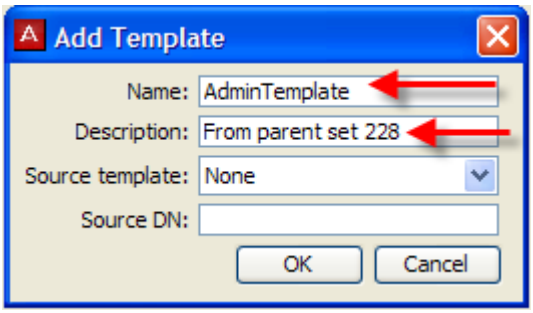
Creating a Template from a Set

You can create a new template based on an existing set, or DN. When you create a template from an existing set, the new template is automatically populated with all the configuration settings of the parent set.

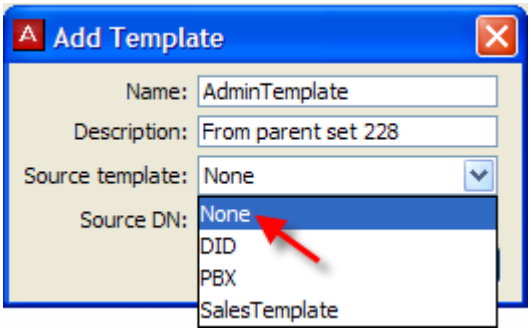
1. From the **Set Templates** screen, click the **Add** button.



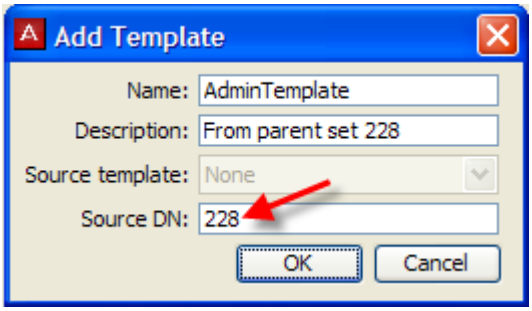
2. Enter a **Name** and **Description** for this template.



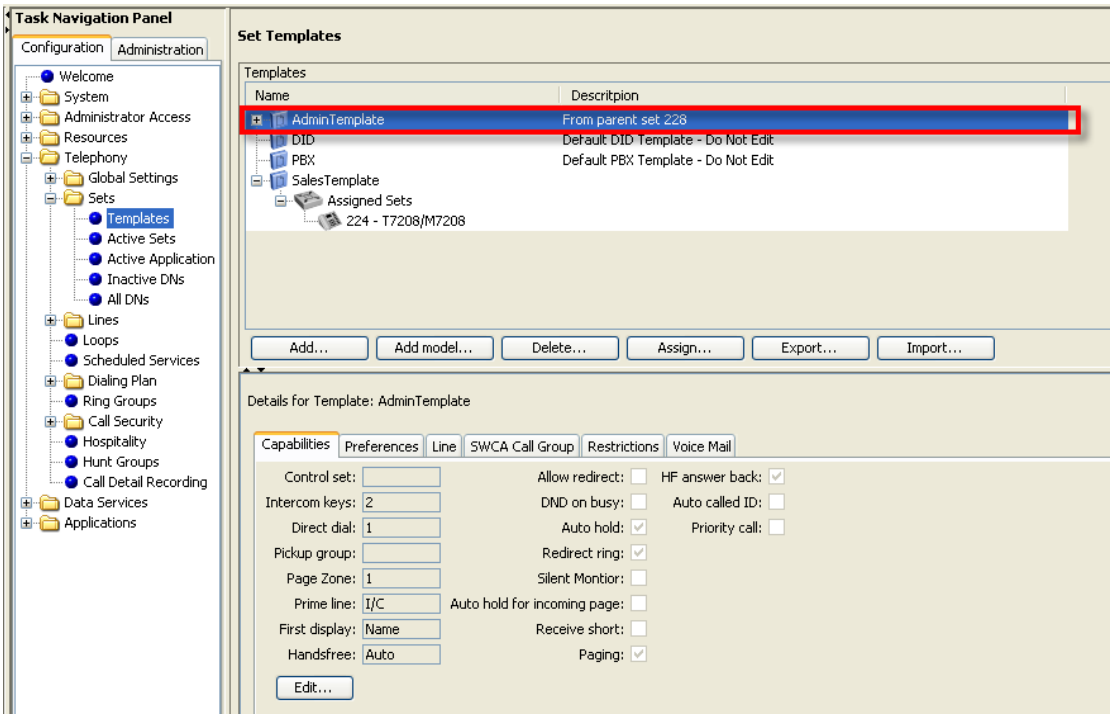
3. A template can be based on an existing template, including the “Sales Template” that was previously created. However, as this particular template is to be based on a set, **None** has been selected.



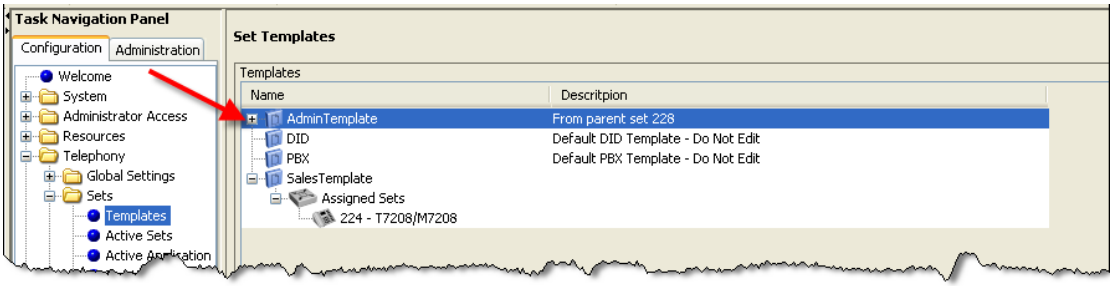
4. In the **Source DN** field, enter the DN (set) from which this template will be based. In this example the template will based on DN 228.



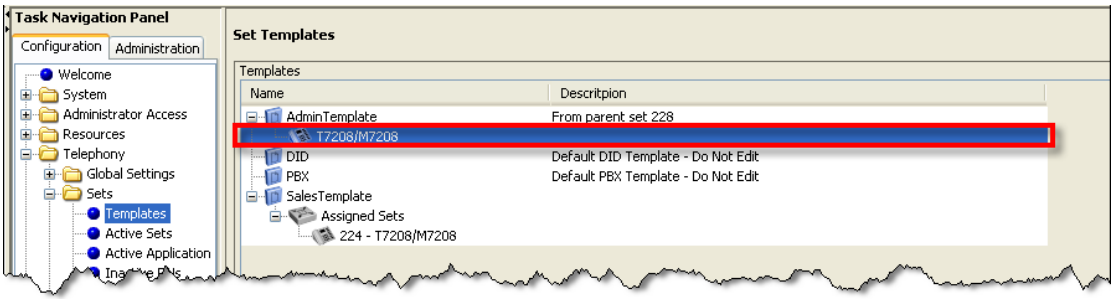
5. Click the **OK** button. The template will be displayed.



6. To display the phone type for the template's parent extension, click on the + sign next to the template icon.



7. The phone model that is assigned to the parent extension for this template will be displayed.



8. Configure the 6 properties tabs in the lower part of the screen as described in the **Creating a New Set Template** section of this guide.

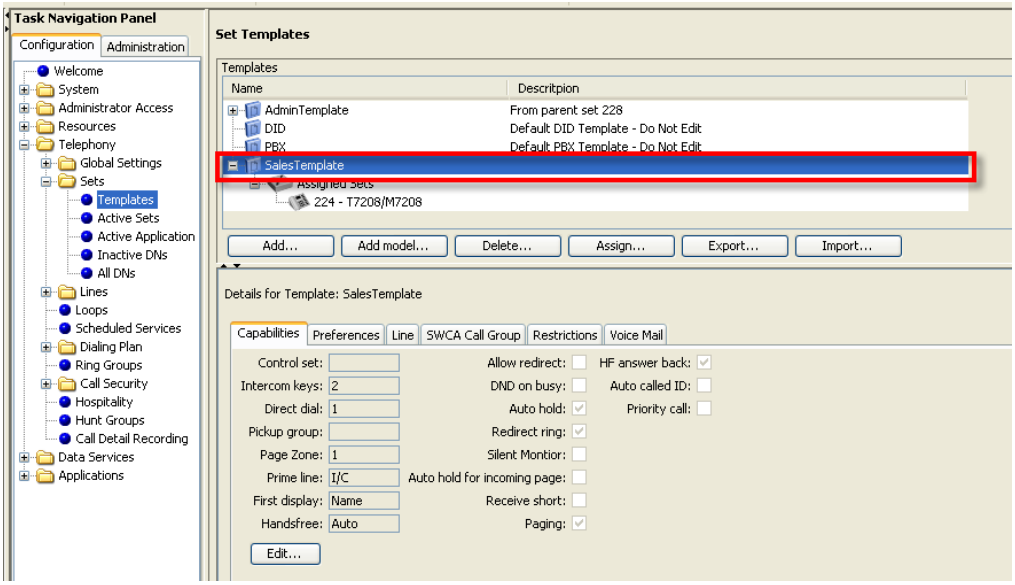
9. Specific DN models can now be assigned to the Template if required (refer to the **Adding Set Models to a Template** section of this guide). After any required set models have been added, the Template can be applied to the BCM sets (refer to the **Applying the Template to Sets** section of this guide).

Adding Set Models to a Template

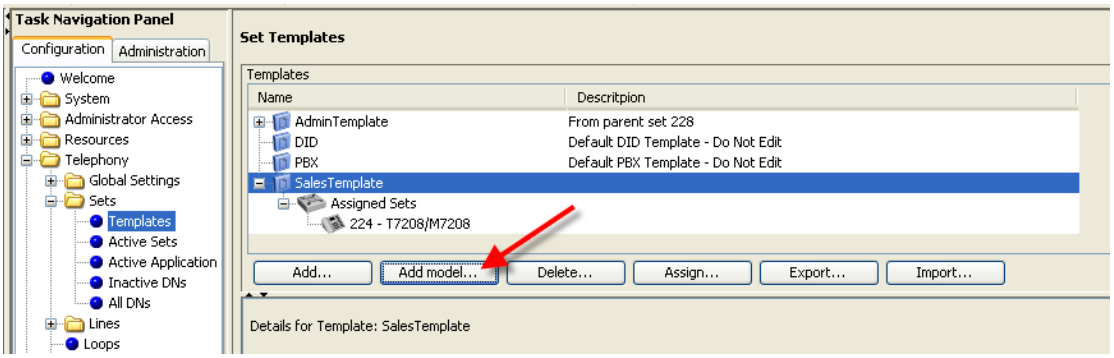
Specific phone models can be added to a template. This will enable the administrator to assign specific button programming to each phone of the same model.

In this example a Phone model will be added to an existing template name Sales Template.

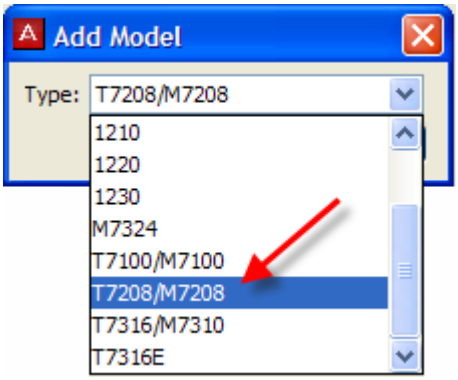
1. Select the template to which the phone model will be added.



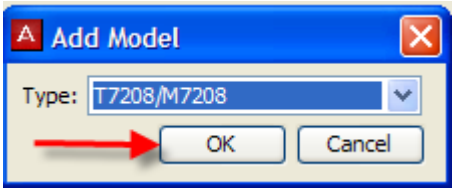
2. Click the **Add Model** button.



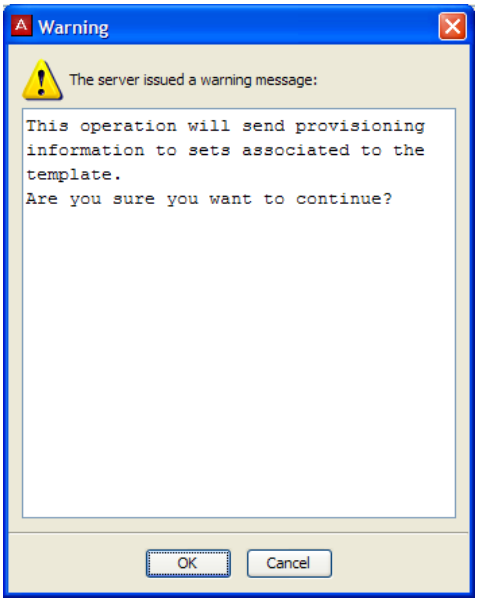
3. The **Add Model** box will be displayed. Select a model from the drop down list.



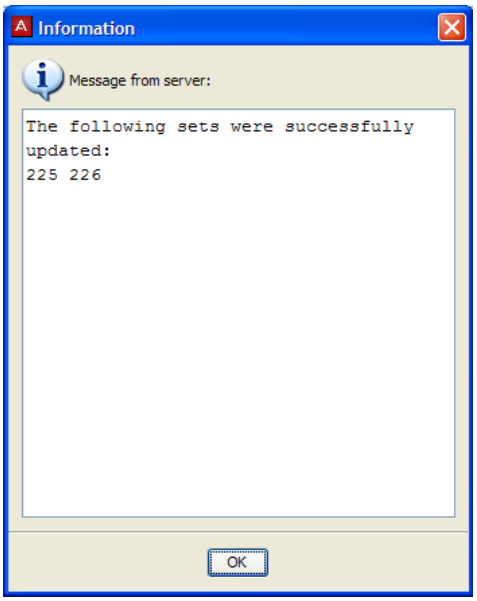
4. Click the **OK** button.



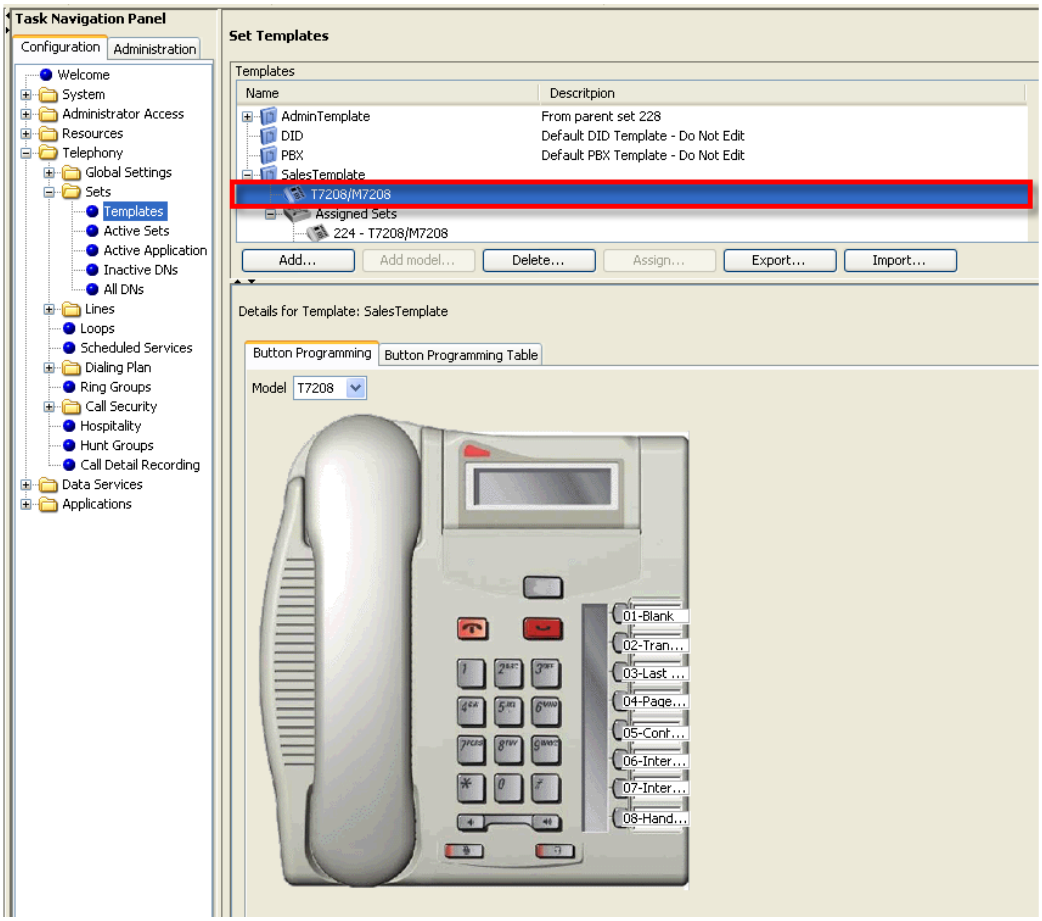
5. If sets are already assigned to the template, a warning screen will be displayed. Read the warning and when satisfied click **OK**.



6. If sets are already assigned to the template, you will be informed of which sets have been updated. These will be the sets of this specific model that have been assigned to the template. Click **OK**.



7. The phone model will be displayed. When the phone model is selected, the **Button Programming** tab and **Button Programming Table** will be displayed.

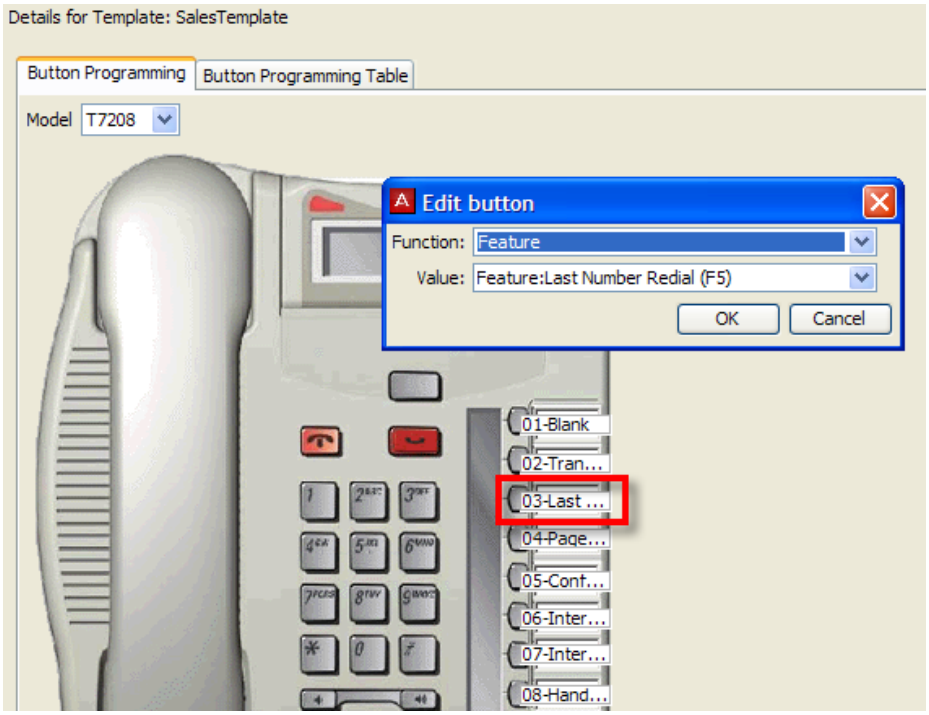


Programming Model Specific Phone Buttons

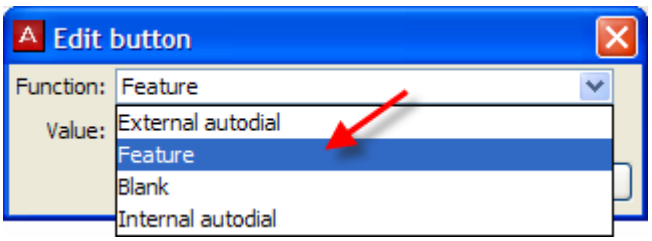
It is sometimes useful to apply standard button programming across the sets assigned to the template, especially in situations where all sets need to conform in terms of button programming. A Contact Centre Skillset is a good example where this may apply.

To program a phone button with a specific feature:

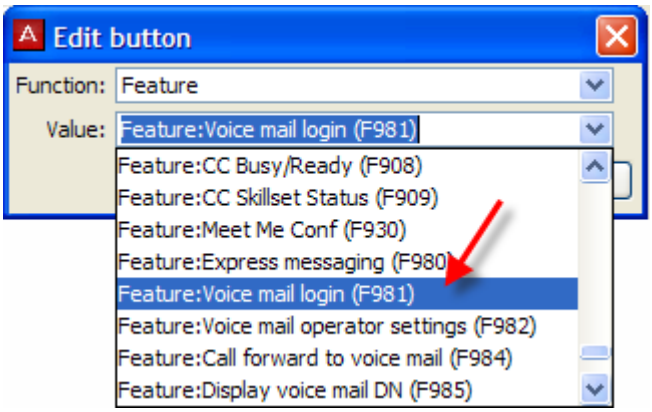
1. On selecting the phone model under the template, the **Button Programming** and **Button Programming Table** tabs appear. In the **Button Programming** tab, click the button that is to be assigned a feature. In this example button 3 with the existing feature Last Number Redial, has been selected. The **Edit button** window will be displayed.



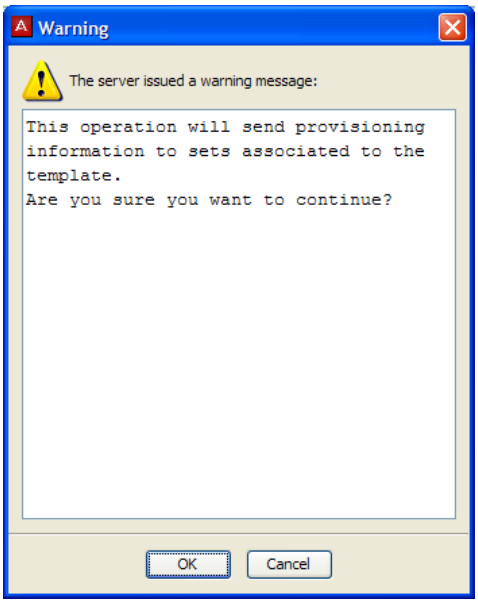
2. From the **Function** drop down, select the required function. In this example **Feature** has been selected.



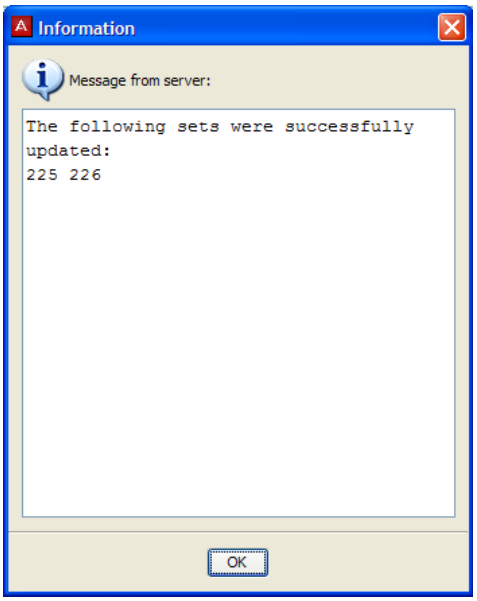
3. From the **Value** drop down, select the feature to be assigned to this button. In this example Voice Mail Login (F981) has been selected. Click the **OK** button.



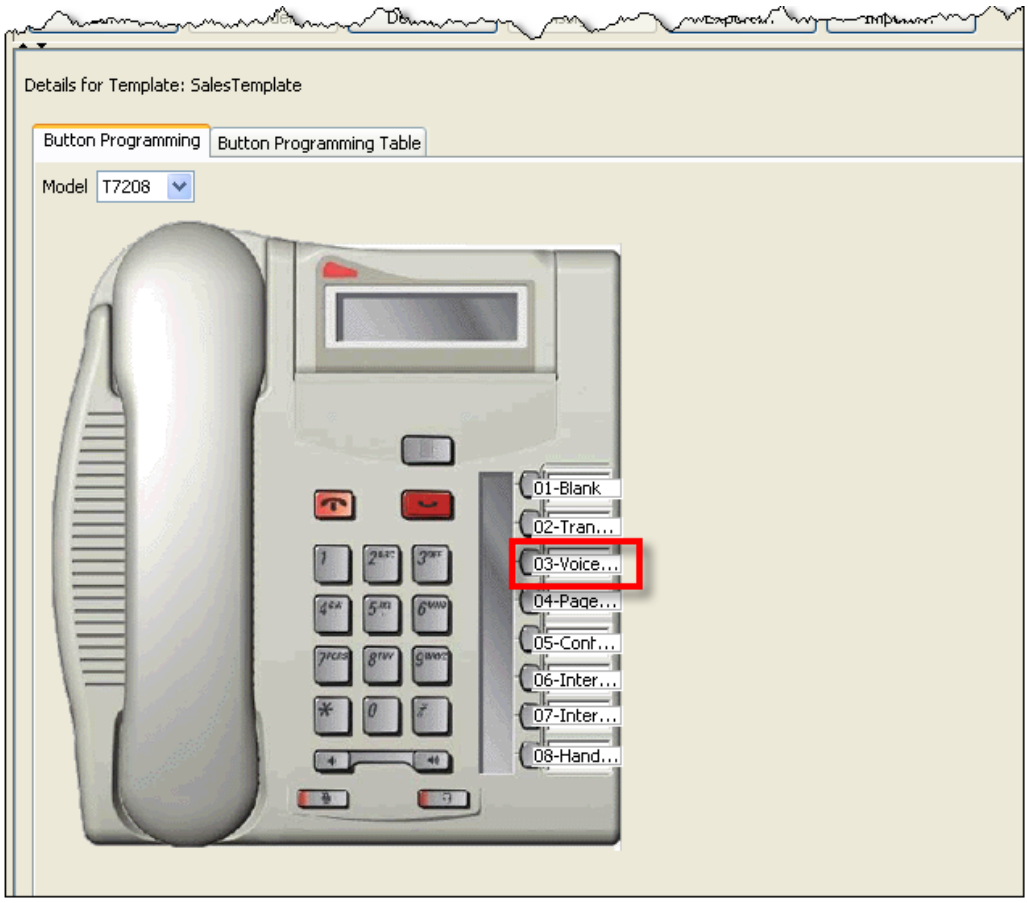
4. If sets are already assigned to the template, a warning message will be displayed. Read the message and confirm that you wish to continue by clicking the **OK** button.



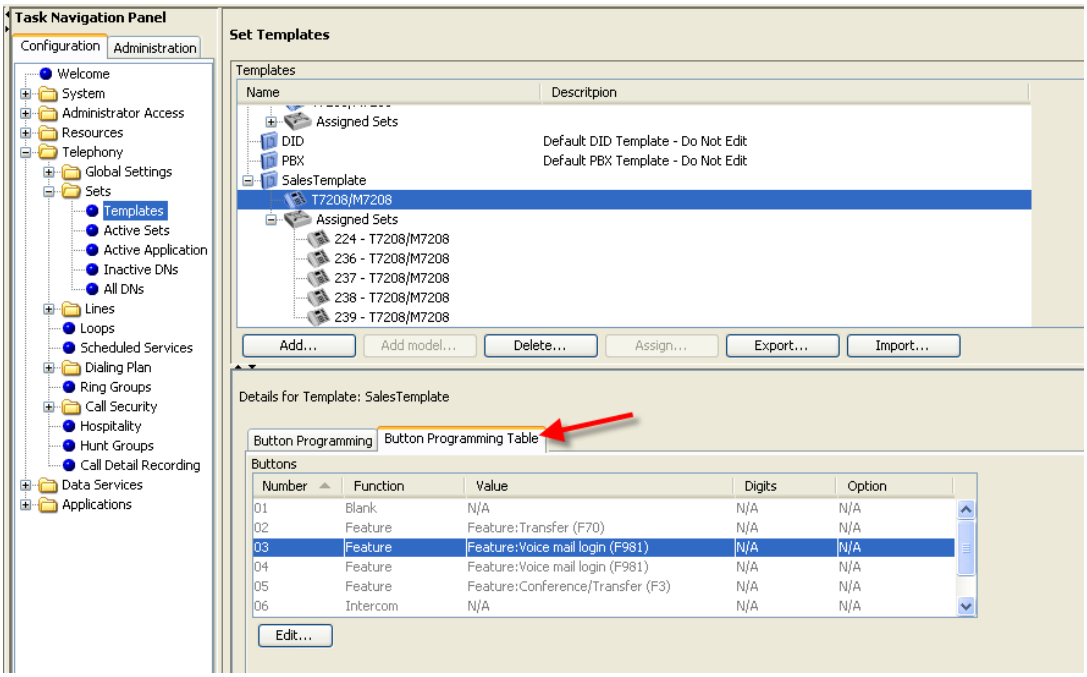
5. If sets are already assigned to the template, you will be informed of which sets have been updated. These will be the sets of this specific model that have been assigned to the template. Click **OK**.



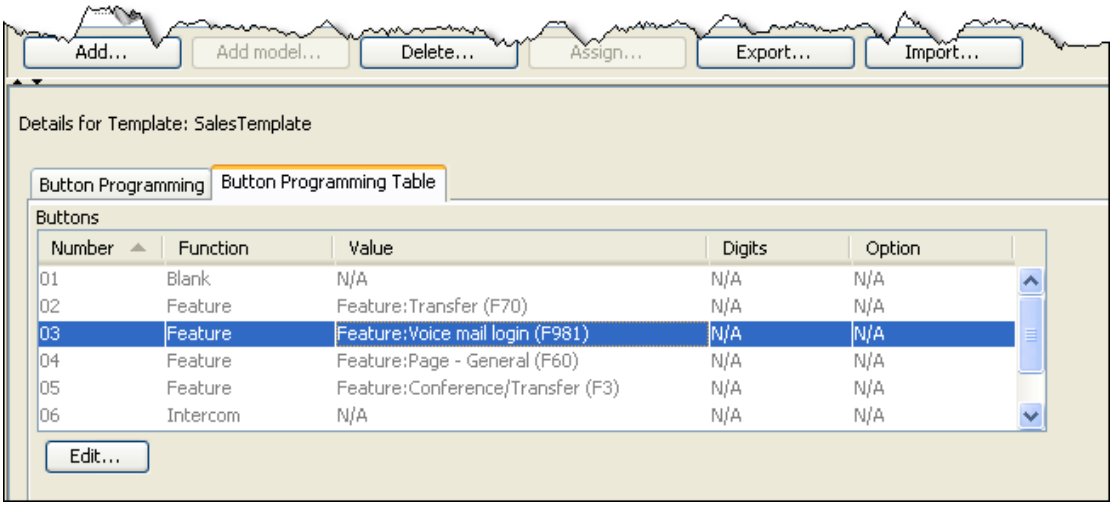
6. The button will be updated with the required feature code.



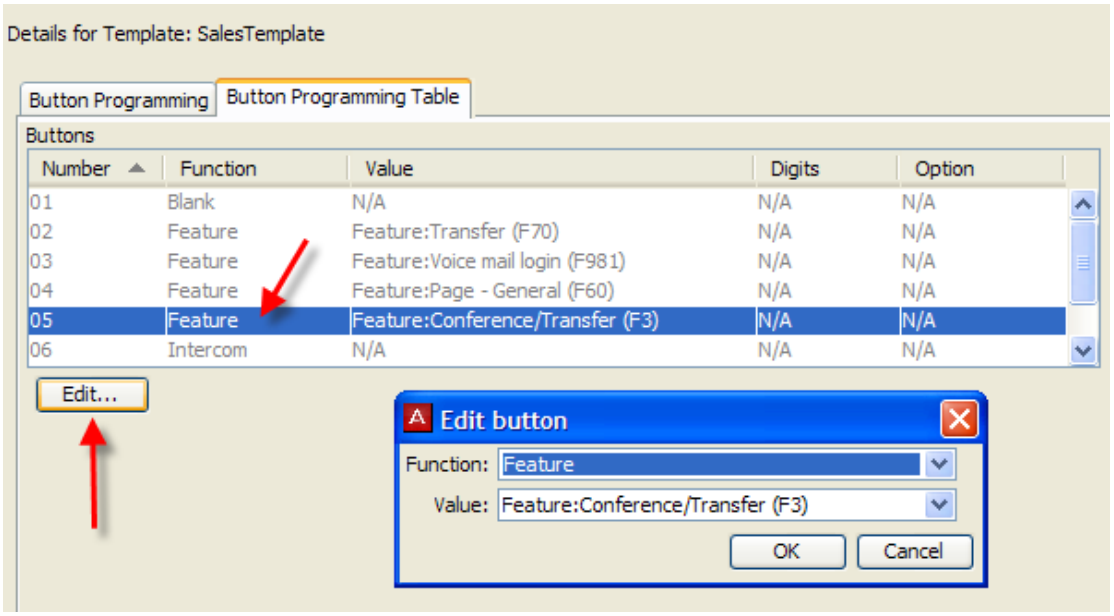
7. Buttons can also be programmed from the **Button Programming Table** tab.



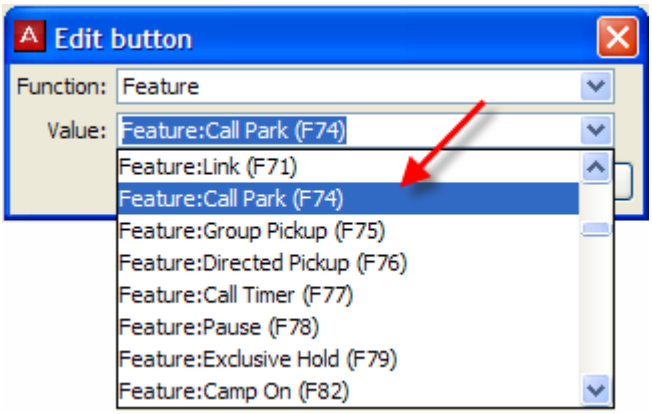
8. In this example, button 3 displays the F981 feature code that was previously configured from the Button Programming tab.



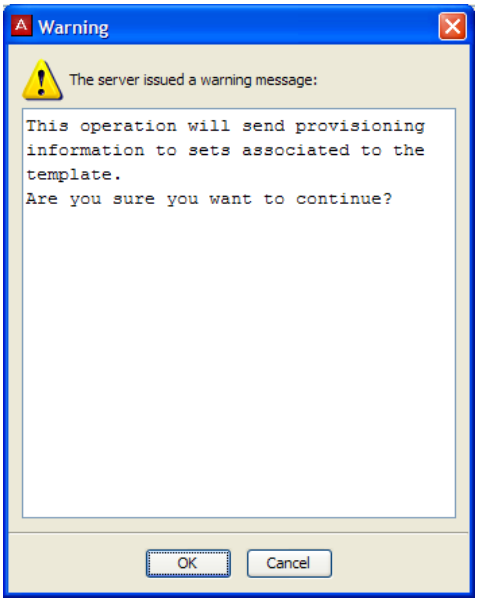
9. The table can be edited by selecting the button number and clicking the **Edit** button.



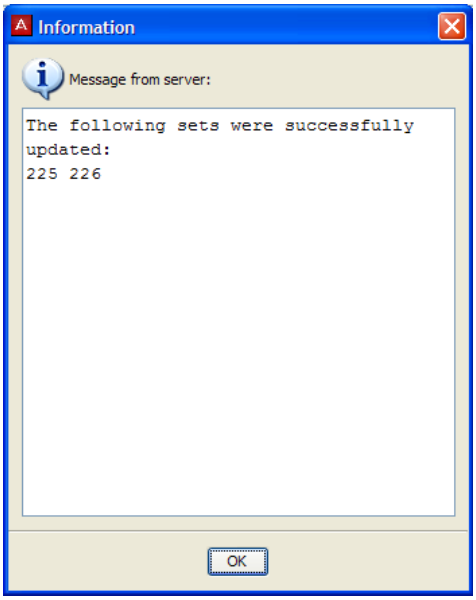
10. In this example the Call Park (F74) feature code has been selected. Click the **OK** button.



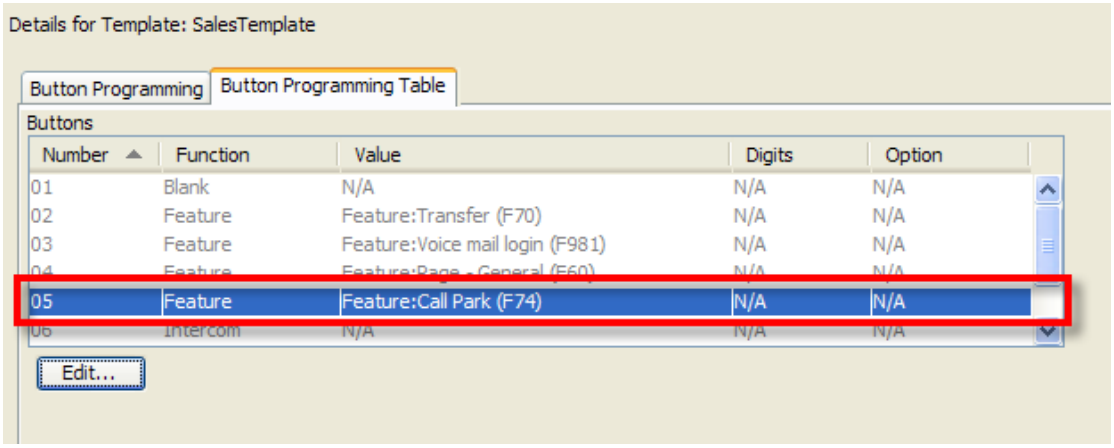
11. If sets are already assigned to the template, a warning screen will be displayed. Read the warning message and when satisfied click the **OK** button.



12. If sets are already assigned to the template, you will be informed of which sets have been updated. These will be the sets of this specific model that have been assigned to the template. Click **OK**.



13. The programmed feature will be displayed.

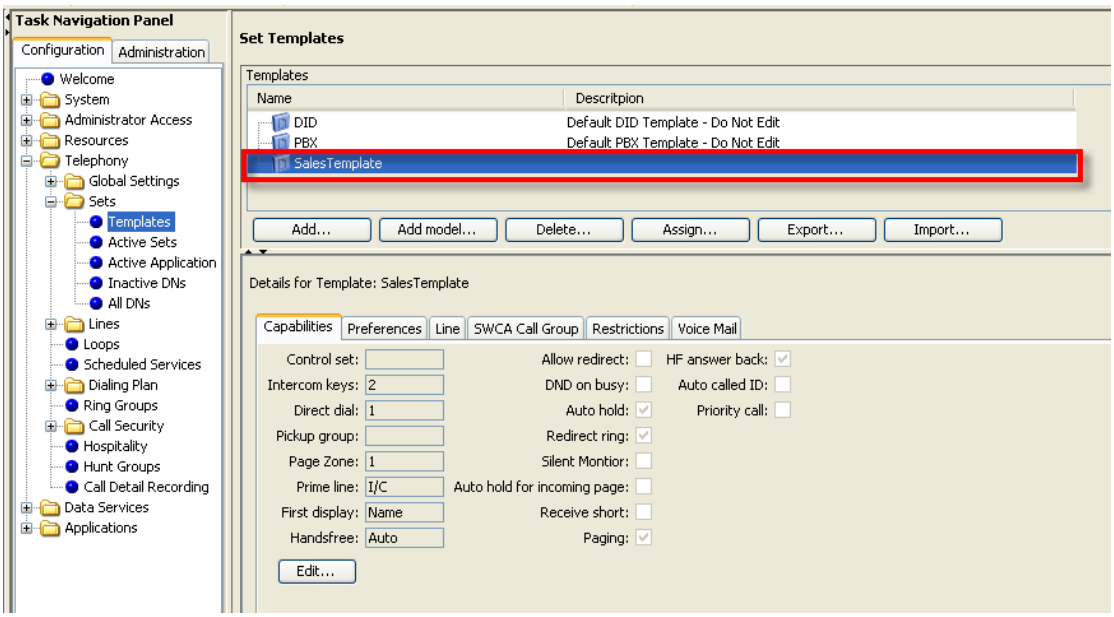


Applying the Template to Sets

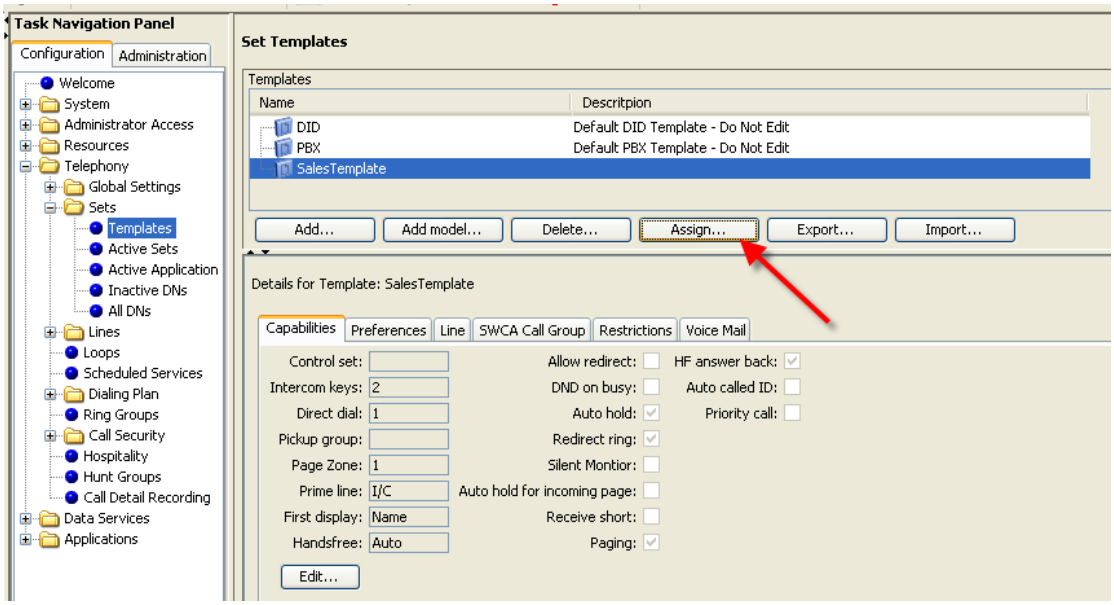
When the template is applied to sets, the sets take on the characteristics of that template.

To apply the template to the required sets:

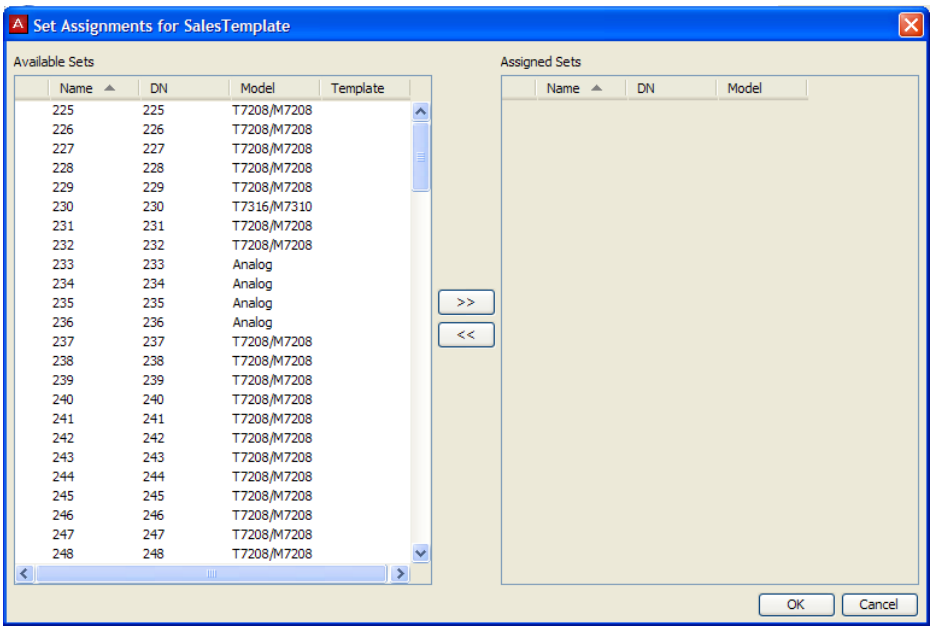
1. Select the required template.



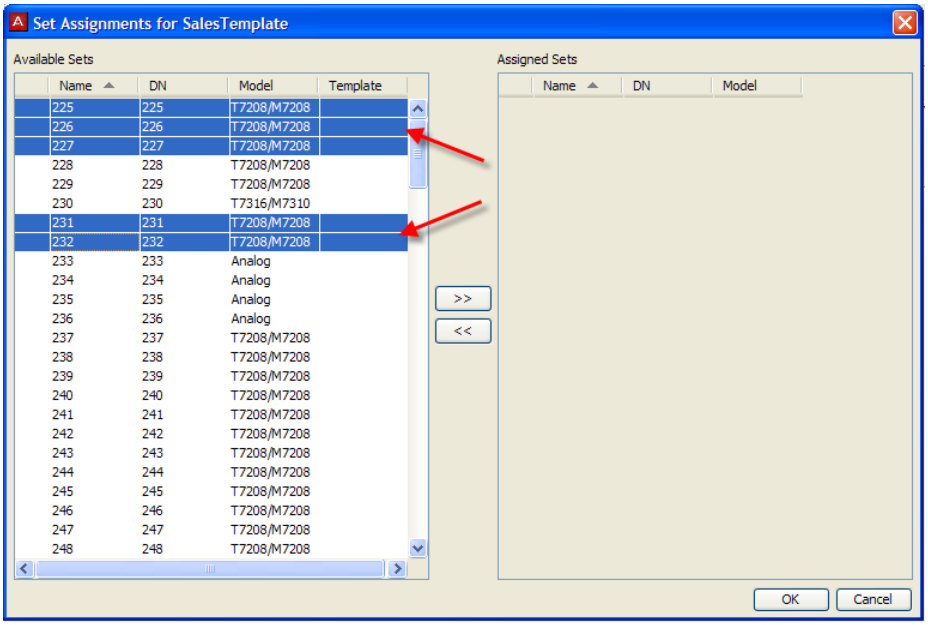
2. Click the **Assign** button.



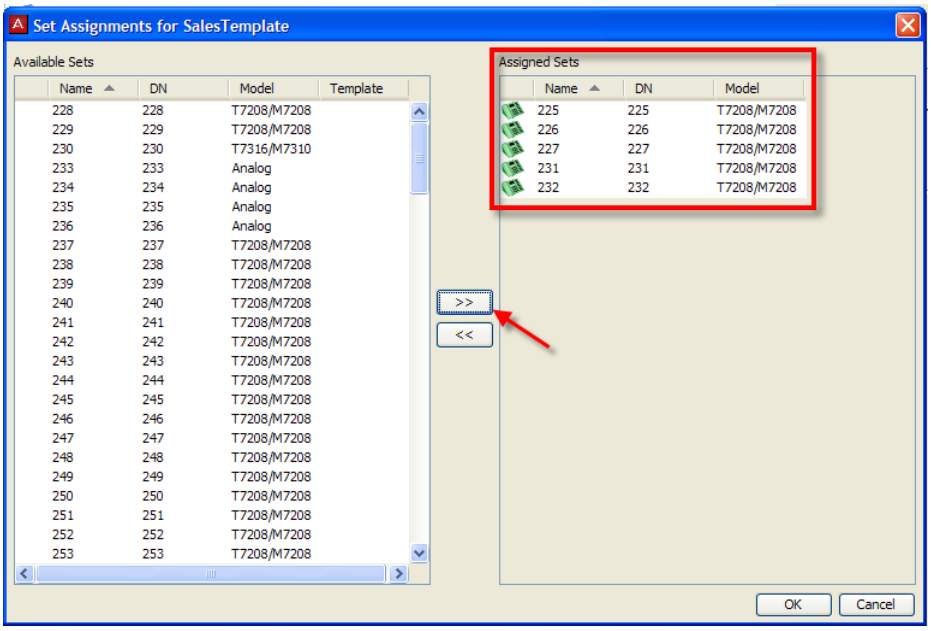
3. In this example the, **Set Assignments for Sales Template** will be displayed.



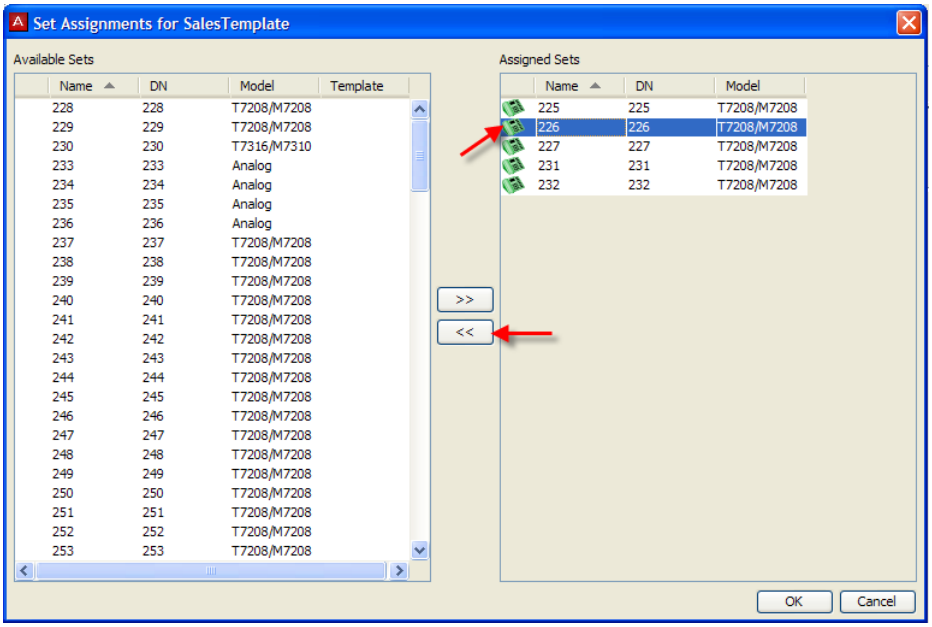
4. Select the sets from the **Available Sets** panel. If more than one set is required, hold the keyboards **Ctrl** key down and click the required sets.



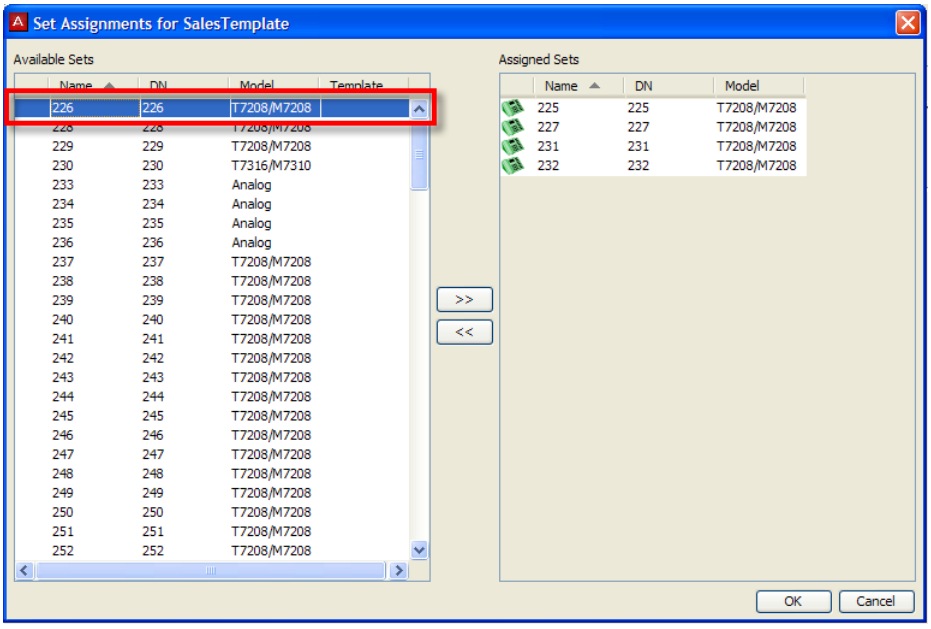
5. Click the right directional arrow in the centre of the panel and the sets will move to the **Assigned Sets** panel to the right.



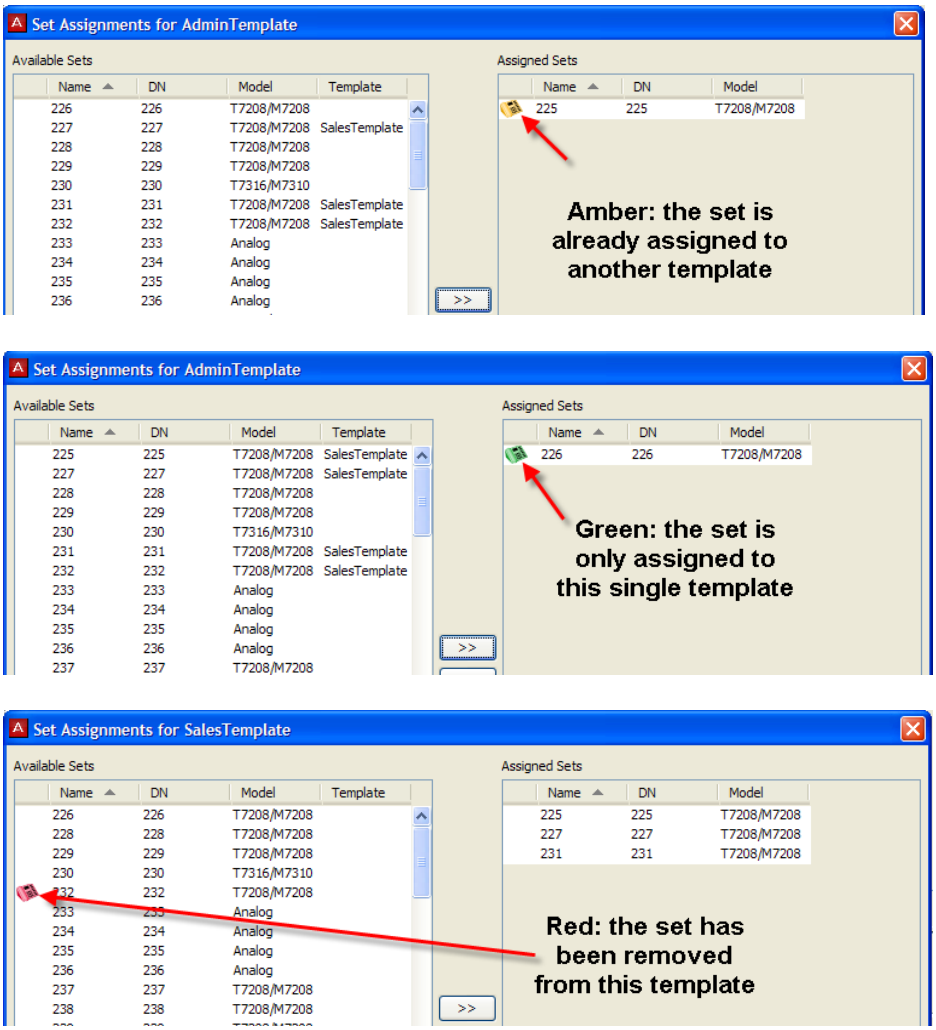
6. To move a set back to the **Available Sets** panel, select the set and click the left directional arrow.



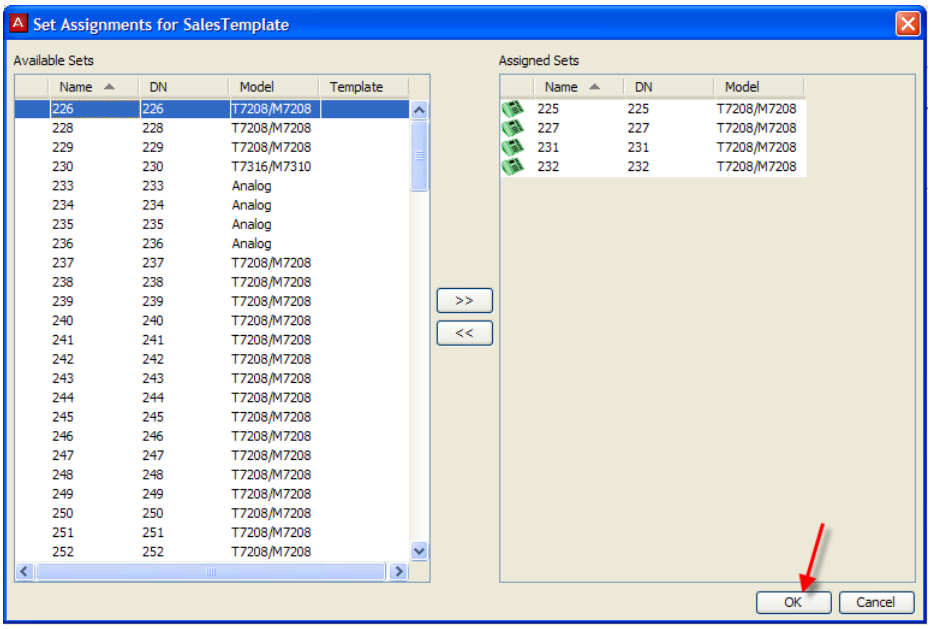
7. Once again, the set will be displayed in the **Available Sets** panel.



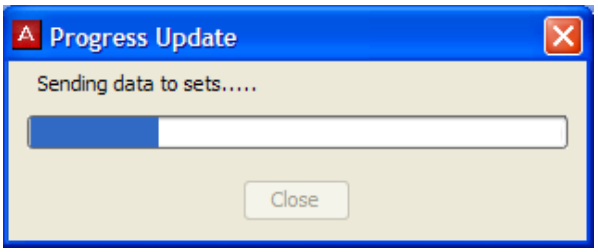
8. The sets assignment status will be depicted by its colour.



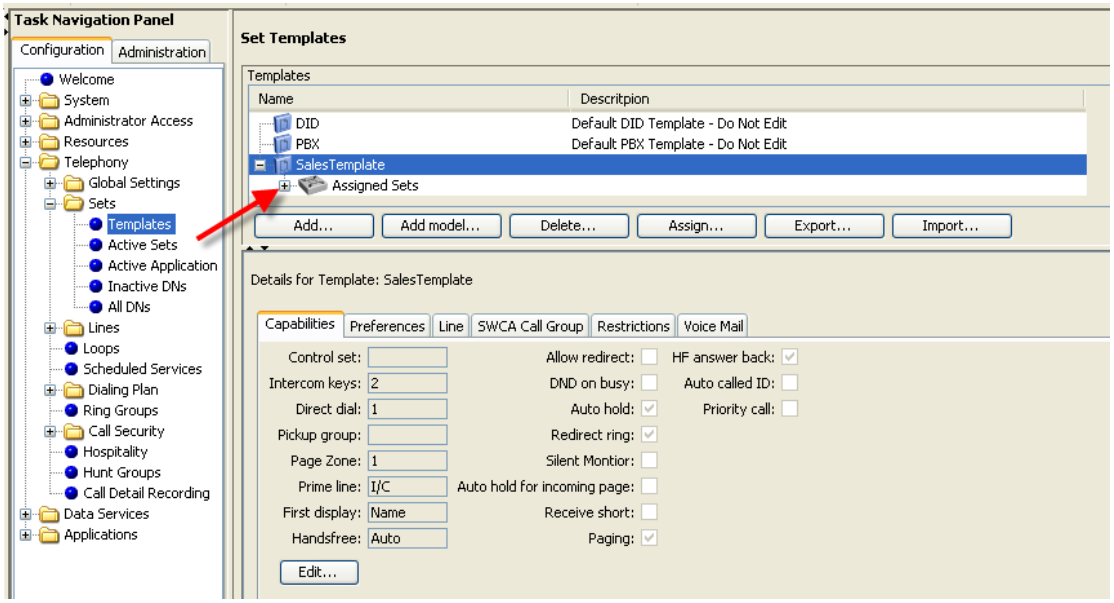
9. When the sets have been correctly assigned click the **OK** button.



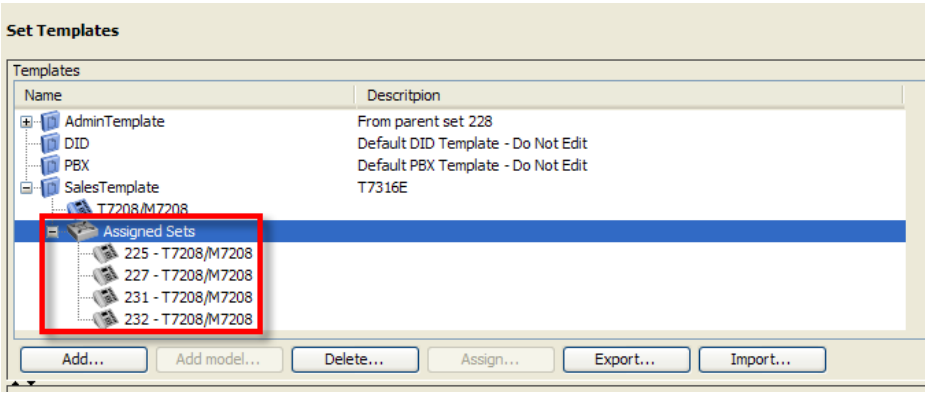
10. The template settings will be sent to the sets.



11. To view the assigned sets, click the + sign next to the **Assigned Sets** icon.



12. The sets will be displayed.

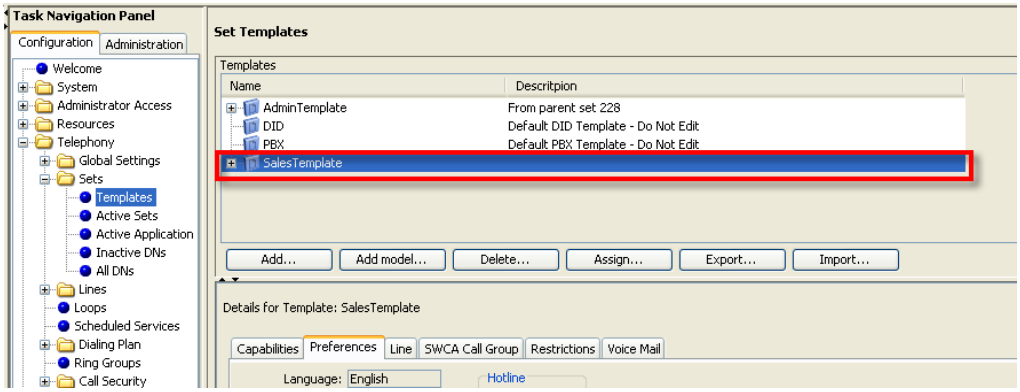


Exporting / Importing a Template

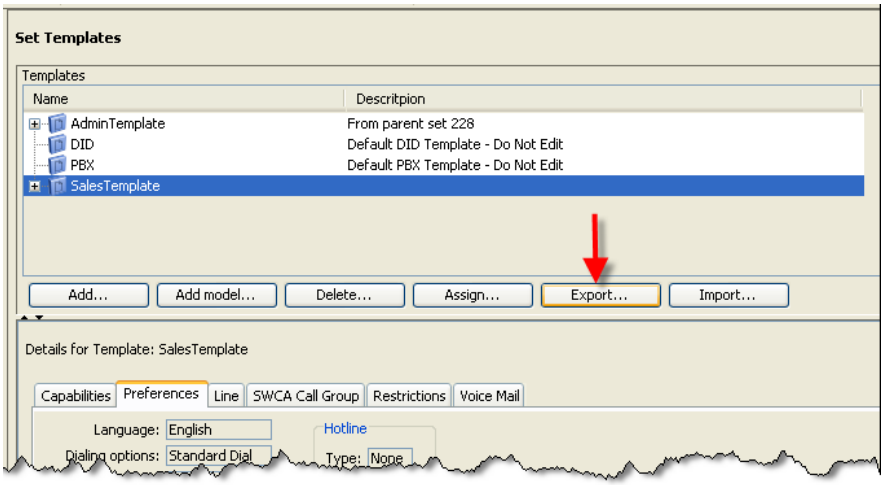
You can export a template from one BCM and then import that template to another. When you import a template, all template programming that you have set are copied to the second BCM, and are applied to the sets on that BCM.

Exporting a Template File

1. From the **Set Templates** screen, select the template to be exported.

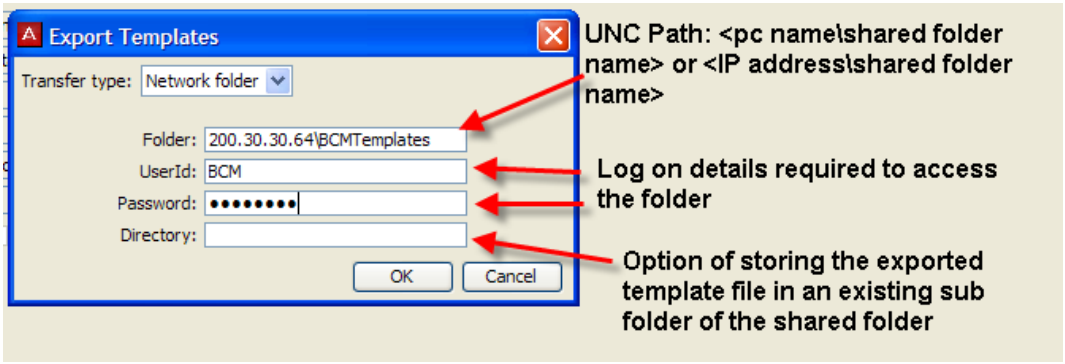


2. Click the **Export** button.

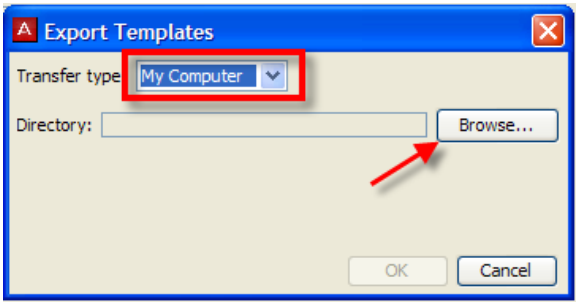


3. From the **Export Templates** window, select the Transfer Type. The options available are My Computer, Network Folder and USB.

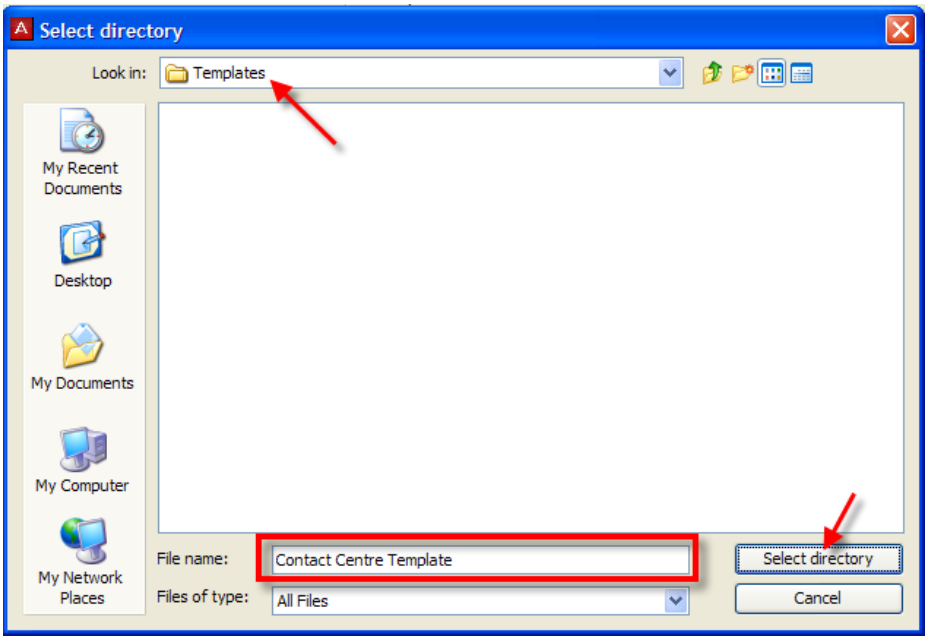
Note: If you select Network Folder as the export destination, the destination UNC path details should be in the following format: <IP Address>\<Shared Folder>, for example 200.30.30.56\salestemplate, or <pcname\shared folder name>, for example htdesktop\BCMTemplates.



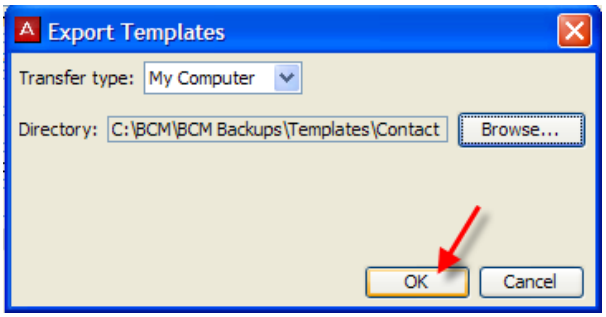
4. In this example **My Computer** has been selected. Select the **Browse** button.



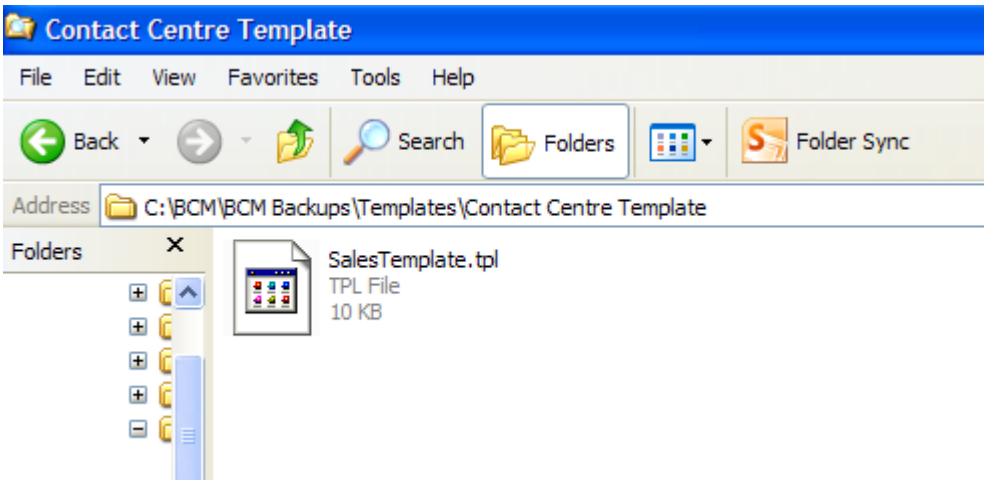
5. The Select Directory window will appear. Select a location where the template will be saved. Name the template file, and click the **Select directory** button.



6. Click the **OK** button.



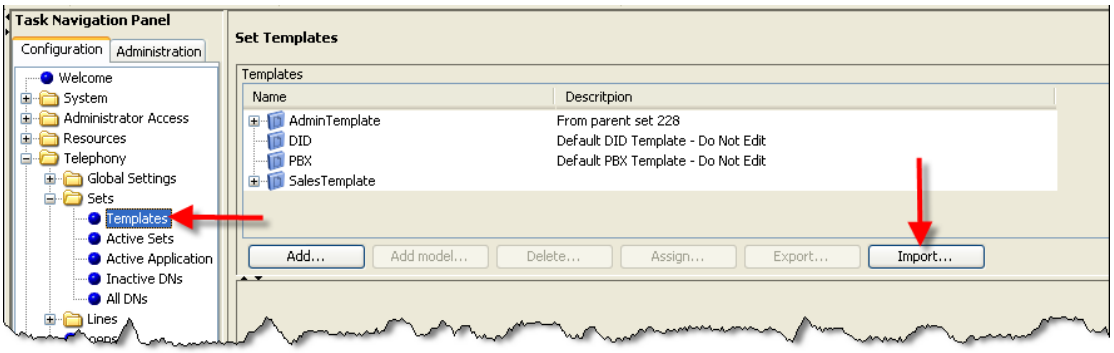
7. The template will be saved in the selected directory.



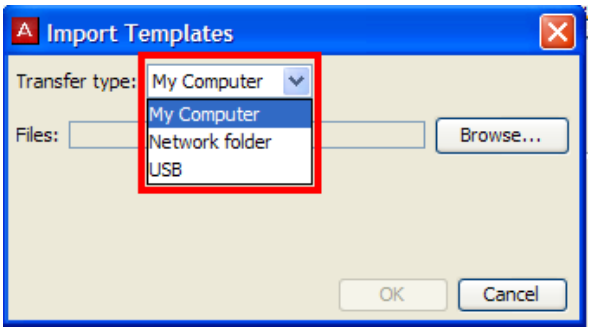
Importing a Template File

To import a template file to a BCM.

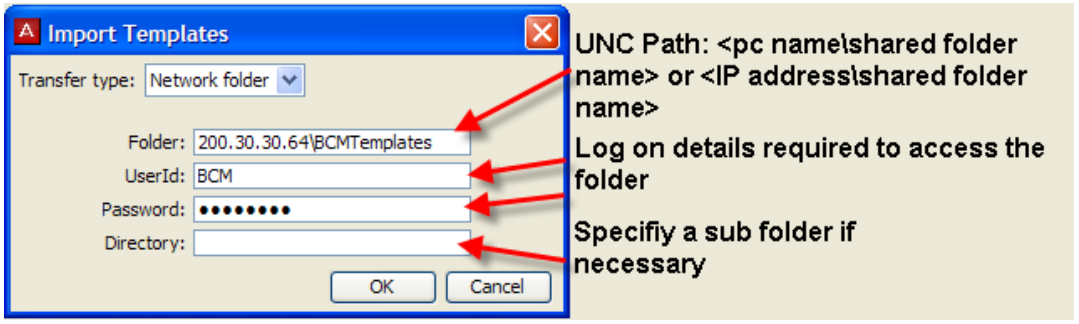
1. From the **Set Templates** screen, click the **Import** button.



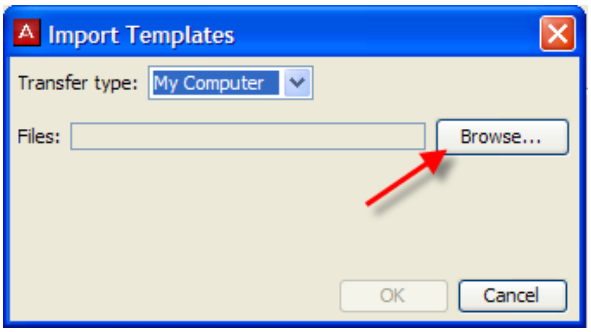
2. The **Import Templates** dialog box appears. From the **Transfer type** drop down list, select the transfer type for which you want to import the template.



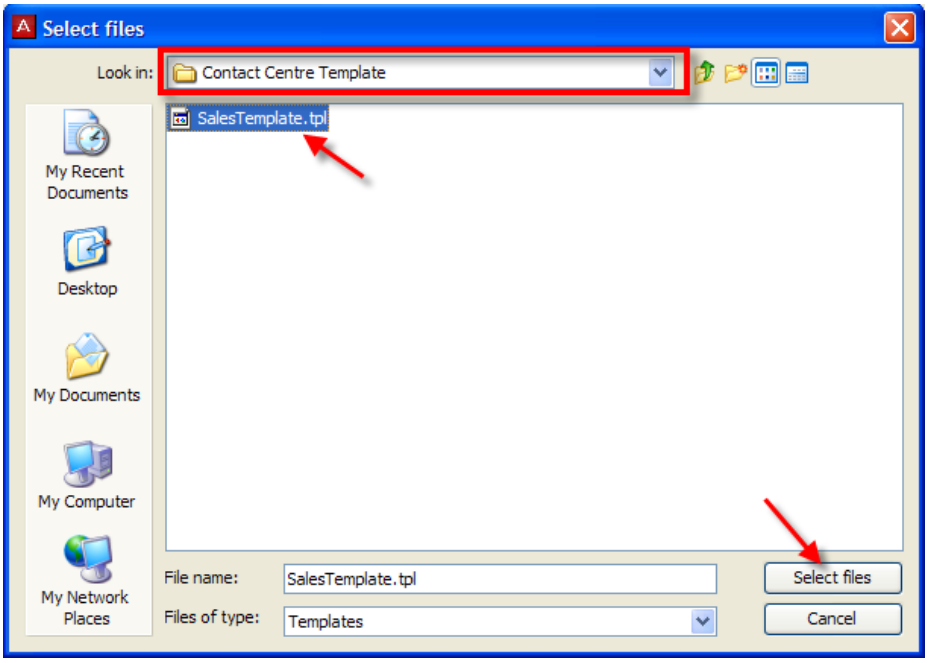
Note: If you select Network Folder as the import location, the UNC path details should be in the following format: <IP Address>\<Shared Folder>, for example 200.30.30.56\salestemplate, or <pcname\shared folder name>, for example htdesktop\BCMTemplates.



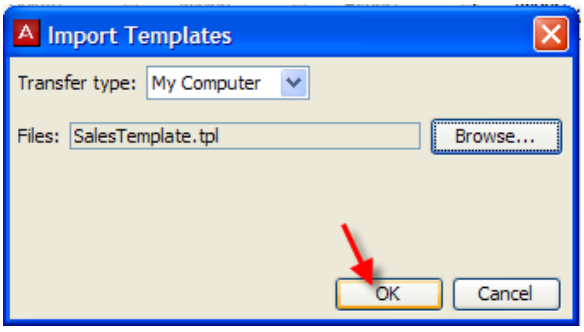
3. In this example **My Computer** has been selected. Click the **Browse** button.



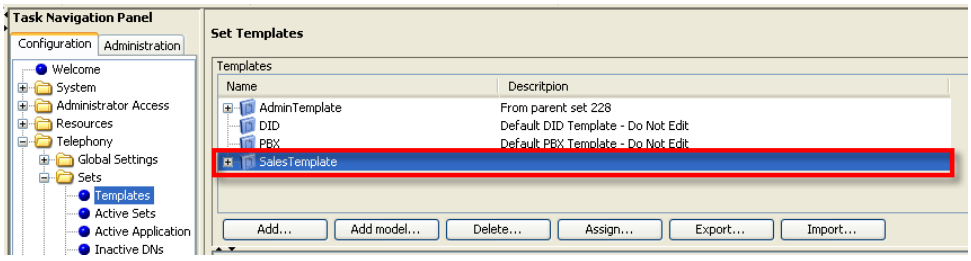
4. Browse to the location of the template's import file. Select the template file and click on the **Select files** button.



5. The location of the template file will be displayed. Click the **OK** button.



6. The template file will be loaded to the BCM. The imported template will be displayed.



Avaya Documentation Links

- Configuration - Devices