

Icecom SwitchBoard

Version 2.0

System Administrator's Manual



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This manual was made for Icecom SwitchBoard version 2.0.

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INTRODUCTION

This manual was made for Icecom SwitchBoard version 2.0 and directed to system administrators. The starting point with the manual is that the system is already installed on the computer. This manual only gives instructions on functions linked with using the system. Instructions for installing the system are provided separately.

The pages of this manual describe the operations of the Icecom SwitchBoard and give instructions on using them. The manual includes clear and detailed instructions as well as pictures for illustrating the instructions.

At the end of the manual there is a vocabulary with a collection of the most essential concepts and terminology used in the manual.

In the manual, the names of buttons have been written with **Verdana** font, and the names of windows, pages and sections have been written in *italics*.



1 ACCESS LEVELS

System administrator can handle four kinds of access levels:

- System administrator
- Switchboard attendant
- Virtual switchboard attendant
- Power user

System administrator has the rights to connect the system to the Icecom SwitchBoard server, add new users and set up call messages and number groups. The system administrator can also make additions to the Phonebook from Excel tables, set up the CallCenter service for the switchboard attendant's use and change the night switch number. System administrator can also change the answer records in use (explained in the konfiguration manual).

Switchboard attendant has certain defined number groups for internal and external numbers (number group definition explained in 4.3). Two phone numbers must be defined for the switchboard attendant, an individual number for each switchboard and a common, general switchboard number for all of them. This is the number that is called from outside the company. Besides the normal switchboard operations, the switchboard attendant has the rights to edit the contents of the phonebook. In addition, he/she can monitor phone call data and edit his/her own presence information.

Virtual switchboard attendant is configured only for retransferring the calls that are arriving to the main switchboard number, to switchboard attendant(s). The number designated for this use can not be a phone number of any user in the system. However, all outside calls are made to this number. Virtual Switchboard attendant's number must be the main switch number (for example 555-555 1000).

Power user level is used for defining the UserBoard users residing in the system. A power user can use his/her own UserBoard to execute normal phone call operations and edit his/her presence information.

The web users of Icecom SwitchBoard are all switchboard attendants and power users.

2 LOGGING IN TO THE SYSTEM

When the system's *Login* page (Figure 1) is opened, the user is asked to type in the username and password to the respective fields. After typing them in, the **Login** button is pressed.

The users of all the access levels log in similarly through the *Login* page.



Figure 1. Login page

The *Login* page also includes the instructions for system administrator, switchboard attendant and power user.

3 CONNECTING TO THE ICECOM SWITCHBOARD SERVER

Only the system administrator can connect the system to the Icecom SwitchBoard server. When the system administrator logs in, the System Admin page is opened (Figure 2).

Figure 2. System Admin page

The system is started by selecting the name of the Icecom Switchboard server to be connected in the drop-down menu at the left of the page and clicking the **Select** button. The information on the selected server will be displayed at the left side of the page (Figure 3).



Icecom SwitchBoard settings

Drop-down menu

Select

Add new

Connect

Stop

Name

Address

Port

Channel agent name

Channel agent port

Timer

Asterisk manager login

Asterisk manager password

Common prefix for extensions

Can be a single number or a comma separated list.

Change

Cancel

Delete

Connected Icecom SwitchBoard servers

Switchboard with established connection

Figure 3. Connecting to the server

After this the system can be connected to the server by clicking the **Connect** button. Alternatively also the server settings can be changed at this stage by changing the information in the text fields and clicking the **Change** button, or servers deleted from the drop-down menu by clicking the **Delete** button.

When wanting to add a new server in the drop-down menu, the **Add new** button must be pressed, which will open a *Create new Asterisk info* segment at the left side of the page. The information on the new server is typed in the text fields and the **Add** button is pressed.



Icecom SwitchBoard server settings:

| | |
|-------------------------------------|---|
| Name: | Server name |
| Address: | Server IP address |
| Port: | Port defined in Icecom SwitchBoard server's manager.conf file |
| Channel agent name: | Virtual user agent defined in Icecom SwitchBoard server's sip.conf file (asteriskCaller by default) |
| Channel agent port: | Define port used by user agent (58867 by default). |
| Timer | Define a default value of how many times the system tries to switch to a transferred number, before the call is returned to the switchboard attendant. The transfer attempt takes ten seconds at a time. |
| Asterisk manager login | Username for Icecom SwitchBoard server's Manager interface. It is defined in Icecom SwitchBoard server's manager.conf file. |
| Asterisk manager password | Password for Icecom SwitchBoard server's Manager interface. It is defined in Icecom SwitchBoard server's manager.conf file. |
| Common prefix for extensions | Normal phone number without an extension (For example: when the normal phone number is 4444111, the prefix is 4444.) The number may be a single digit or a list divided by comma, if the switchboard supervises over several numbers. |

N.B! If the prefix number is changed for a switchboard that has already established a connection, the connection must be stopped after the change with the **Stop** button and started again with the **Connect** button, in order to update the new number to the system.

Please note!

The Icecom SwitchBoard server should NOT be reconnected each time when logging in. The header "Connected Icecom SwitchBoard servers" in the bottom left corner of the System Admin page shows already connected Icecom SwitchBoard servers (Figure 2). The connection must be established to the server, if the desired server is not shown under the header.

If connection to the server is established successfully, the name of the connected Icecom SwitchBoard server will appear at the bottom of the page under the header "Connected Icecom SwitchBoard servers".



If connection to the server is not established, the text (Could not connect to 'XXX XXX'!) will appear under the **Add new** button. In this case, check that the server is operational. If connection to the server in question had already been established, the same location on the screen will display the text “Already connected to 'XXX XXX'!” (Figure 4).



Figure 4. Announcement of the connection already existing with the server in question

4 SETTINGS

In the *Settings* section (Figure 5) on the *System Admin* page, the system administrator can create new Icecom SwitchBoard web users, edit their information and delete Icecom SwitchBoard web users from the system. In the *Settings* section it is also possible to add phone numbers to the phonebook of web users from Excel tables, edit previous Excel additions and delete them from use. The system administrator can also add, edit and delete call messages and number groups as well as define the CallCenter service for use by the switchboard attendant.

In the *Settings* section, the system administrator can also change the number of the night switch to which calls are directed in the absence of switchboard attendants. The night switch number is changed by typing in a new number in the text field at the bottom of the *Settings* section and then clicking the *Change* button.

The system administrator can also change the setting of the clear queue timer in the settings section. Timer can be set from 3 to 10 seconds from the drop-down menu. Clear queue timer defines the time the system waits after a call before it connects the next call from the queue.



Create new user

User 1
User 2
User 3

Find info

Found the following Excel files:

Phonebook.xls

Search

Operator services

User 1
User 2

Show

Activate CallCenter

Nightswitch number
8060

Change call queue delay.
3

Change

Figure 5. Settings section on the System Admin page

4.1 Adding a new Icecom SwitchBoard web user, editing information and deleting user

Only the system administrator can **add** new Icecom SwitchBoard users to the system. A new Icecom SwitchBoard web user is added through the *System Admin* page by clicking the **Create new user** button at the right side of the page in the *Settings* section. Then a *Create new Icecom SwitchBoard web user* window will open at the right side of the page (Figure 6). The information on the new Icecom SwitchBoard web user (specified below) is typed in the text fields opening on the page and the **Create** button is pressed. Then the new Icecom SwitchBoard web user will appear in the user information on the switchboard table (switchboard attendants) and the UserBoard (power users).



Real name

Username

Password

Password confirmation

Phone number

SIP identification

Context

Mailbox

SwitchBoard server

Additional info

Access level

Id

Create **Cancel**

Figure 6. Create new Icecom SwitchBoard web user window

Information in the text fields in Figure 6 (user here signifies Icecom SwitchBoard web user):

| | |
|-------------------------------|---|
| Real name: | Name shown to other users in user information on the switchboard table/UserBoard |
| Username: | Name used for logging in to the system |
| Password: | Freely selected password |
| Password confirmation: | Re-type password |
| Phone number: | User's normal phone number, e.g.1234567 |
| SIP identification: | User SIP ID defined in Icecom SwitchBoard server's sip.conf file |
| Context: | Context, to which user wanted to belong. Context of number defined in Icecom SwitchBoard server's extensions.conf file. |

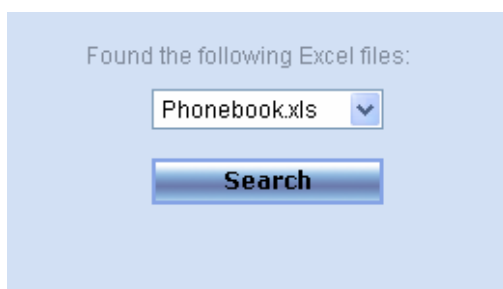


| | |
|----------------------------|--|
| Mailbox: | User mailbox number defined in Icecom SwitchBoard server's voicemail.conf file |
| SwitchBoard server: | The name of the Icecom SwitchBoard server, which the person is specified as user of |
| Additional info: | Additional information for example of the skills and expertise of the user, shown to other users in the additional info field |
| Access level: | From the drop-down menu select system administrator, switchboard attendant or other users as the access level describing the user's access rights. |
| Id: | Id number field is included to allow Flexim passage monitoring expansion later. The phone number of user in question should be entered in the Id number field. |

A system administrator can **edit** the information on the Icecom SwitchBoard web users. In the *Settings* section (Figure 5) select username from the menu and click the **Find Info** button. The information is changed in the desired fields before clicking the **OK** button. Similarly, a system administrator can also change his/her own information.

A system administrator can also **delete** Icecom SwitchBoard web users from the system. This is done by searching the information of an Icecom SwitchBoard web user through the *Settings* section as before and then clicking the **Delete user** button.

4.2 Phonebook Excel additions as well as editing and deleting them



A system administrator can make additions from Excel tables into the phonebook of Icecom SwitchBoard web users. Excel additions are made by first selecting an editable Excel table from a drop-down menu in the *Settings* section and then clicking the search button (Figure 7). The right side of the page will display the information from the selected Excel table (Figure 8).

Figure 7. Editing an Excel table in the Settings section



Choose user to show or not to show spreadsheet to:

Choose user: All, User 1, User 2

Shown to: User 3, User 4

Buttons: Add, Remove, Save changes, Back, Add, Add sheet

Text fields: Phonebook.xls, [Empty]

Buttons: Change filename, Find number

| Sheet | Row | Name | Number | Type | Id |
|-------|-----|----------------|--------|------|-----|
| 1 | 1 | Matti Mäkelä | 200 | SIP | 300 |
| 1 | 2 | George Gabriel | 201 | SIP | 301 |
| 2 | 3 | Lisa White | 202 | SIP | 302 |

Figure 8. Excel file information section

When making additions in an Excel file, click the **Add** button in the *Excel file information* section. Then type the name phone number and type of phone number (such as GSM) of the person in question in the text fields opening on the page (Figure 9). In the field “Additional info”, it is possible to type e.g. information on the person’s expertise and status. The information helps a switchboard attendant who has to connect the call to an expert in a certain field. The information is shown as user information on the switchboard attendant’s switchboard table when clicking the mouse once on the name of a person.

In the Context field, define a context to which user wanted to belong. Context of number defined in Icecom SwitchBoard server’s extensions.conf file. The Id field is included as a ready supplement for a later expansion with Flexim passage monitoring. However, a number must be entered in the Id field at all times, and the number must be different for every user. In the Sheet field, select a page number in the drop-down menu stating the page on which to add the user in question in the Excel file.

Real name: Jani Julkunen

Number: 369

Type: PSTN

Additional info: Marketing

Context: XXXX

Id: 369

Sheet: 1

Buttons: Add, Cancel

Figure 9. Adding information in the Excel file



The number '369' already exists.('Jani Julkunen')

| | |
|-----------------|-----------------|
| Real name | Jean Spears |
| Number | 369 |
| Type | PSTN |
| Additional info | Project Manager |
| Context | XXXX |
| Id | 369 |
| Sheet | 1 |

Add **Cancel**

Figure 10. Announcement of the number already being in use

Please note!

If the entered Id number or phone number is already in use in the same file, the top of the page will display a message stating this, with information of the person using the number (Figure 10).

When all the information has been entered in the fields, finally click the **Add** button. When all the desired additions have been made, click the **Save changes** button in the section *Excel file information* (Figure 8), and the additions will be saved in the Excel file.

| | |
|-----------------|----------------|
| Real name | Tina Tigerholm |
| Number | 357 |
| Type | PSTN |
| Additional info | R&D |
| Context | XXXX |
| Id | 357 |

Change **Cancel**

Available
 Busy
 Do not disturb

Remove

Saved Excel additions can be edited and deleted by clicking on the name of a selected person in the Excel file. The window that opens (Figure 11) allows changing the information of the selected person by changing the information in the fields and clicking the **Change** button. The information can be deleted from the file by clicking the **Remove** button. When wanting to delete the whole sheet from the Excel file, click the **Remove page** button.

Figure 11. Editing and deleting information in the Excel file

Please note!

Every time that a user name or phone number is changed, the user password changes into the original one (= user's phone number).

When an Excel file contains a lot of information, a number to be edited or deleted can also be searched from the file with the Search function. Type the number in the respective field and click the **Find number** button (Figure 8). The system then shows only the information on that number from the file. When wanting to see all the information in the file afterwards, click the **Show all** button.



When needed, a system administrator can also change the presence information for users added in the Excel file; for example in a situation when a user has gone on vacation and forgotten to change the information about his/her current status. The presence information is changed by selecting the desired presence status from the drop-down menu (Figure 11) and then clicking the **Change** button.

The filename of an Excel file can be changed by typing the new name in the text field (Figure 8) and clicking the **Change filename** button. Scandinavian alphabets with dots cannot be used in the filename.

In the same window the system administrator can choose to whom the numbers of an Excel sheet are shown to. The system administrator can choose which sheet is shown to which user or if some sheet is shown to every web-user. If the alternative “All” is chosen, the Excel sheet is shown to every web-user. The system administrator can also choose users one by one by selecting a user from the menu and clicking the **Add** button. When a user is to be removed from the list, select the wanted user and then click the **Remove** button.

When all the desired edits and deletions to the file have been made, finally always click the **Save changes** button (Figure 8), and the changes will be saved in the Excel file. When clicking the **Save changes** button, the system checks if the additions overlap with the phone numbers and ID values already existing in the phonebook. If the phonebook already contains same phone numbers or ID values that are about to be added, the system does not replace these values with new ones and displays a message stating how many additions were not made in this case.

Please note!

The directory path of the Excel files is saved in the file \$CATALINA_HOME/webapps/SwitchBoard/classes/SwitchBoardResources.properties located in the server, under excel.directory = (by default: /webapp/SwB/spreadsheets). After this the Excel files can be saved in the set directory. Updating the Excel files in the SwitchBoard software requires restarting the Tomcat program.

4.3 Adding, editing and deleting number groups

Only a system administrator can set up number groups, and number groups can also be set up for switchboard attendants. There are two types of number groups:

- one switchboard attendant supervises several numbers
- several switchboard attendants supervise one number

Several phone numbers can be placed under the supervision of a single switchboard attendant or a single phone number can be placed under the supervision of several switchboard attendants. One switchboard attendant supervises over several numbers for example in a situation where it is wanted that the calls of several companies come to the same switchboard. Also several switchboard attendants can supervise one number together, in which case the call is answered by the attendant who gets there first, if the CallCenter service is not in use.



A number group is added through the *Settings* section by first selecting the desired number in the menu under the header “Operator services”, and then clicking the **Show** button (Figure 12). This opens a window as shown in Figure 13. At the left side of the window, new numbers can be added in the number group of a chosen switchboard attendant as well as edited or deleted from a number group.

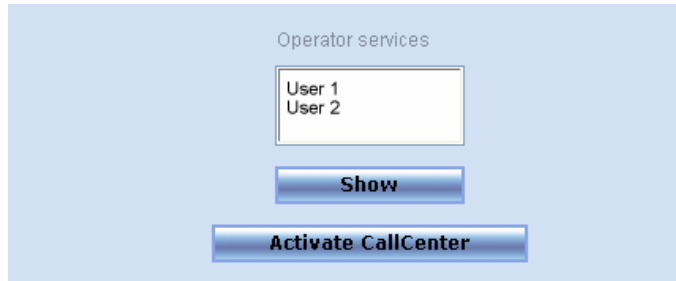


Figure 12. Operator services in the Settings section

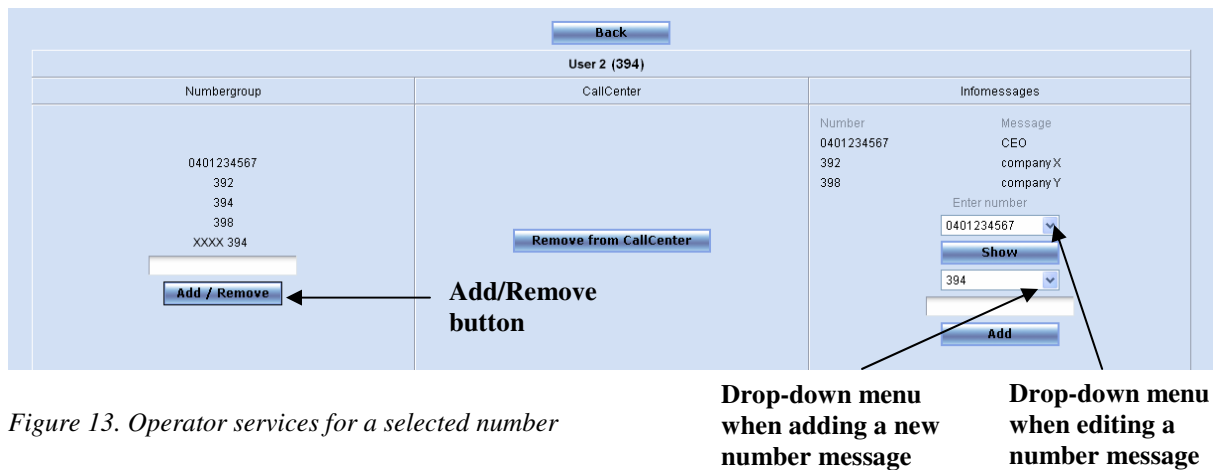


Figure 13. Operator services for a selected number

When **adding** numbers in a number group for a switchboard attendant, type the new number to be supervised by the attendant in the text field, and click the **Add/Remove** button. If some number is wanted to **delete** from the number group, the number has to be typed in the text field and click the **Add/Remove** button. If it is wanted that several switchboard attendants supervise one number, the number in question has to be added to the number groups of all the attendants individually. **Editing** a number group is done by removing a desired number from the number group and then adding a new number for the username in the number group.

Please note!

In order for the switchboard attendant to receive incoming calls, also the number of the switchboard has to be added in the attendant’s number group.

When a number has been set in a number group, the user’s phone will ring normally when receiving a call, but the call is also shown on the switchboard table of the attendant. Setting up number groups does not prevent the users phone from working, but instead it gives the switchboard attendant the possibility to answer calls incoming to a defined number.



4.4 Adding, editing and deleting info messages

A system administrator can add info messages for the web users in the Icecom Switchboard system, to facilitate the work of the switchboard attendant. The switchboard attendant sees the info message in call queues where the recipient is indicated, and knows the number to which a call was placed. If for example the numbers of several companies are being supervised in the system, and the calls of all companies have been directed to the same switchboard, the info messages show the company to which an incoming call was placed. Then the switchboard attendant can answer calls placed to different numbers in a different way. An info message can also be added in connection to very important calls in order to separate them from other calls, for example to calls placed to a CEO, if the switchboard attendant monitors his/her calls.

An info message is added through the *Settings* section by first selecting the desired number from the menu under the header “Operator services” and then clicking the **Show** button (Figure 12). This opens a window as shown in Figure 13. At the right side of the window it is possible to add, edit and delete info messages.

When **adding** info messages, first the drop-down menu is used to select the number for which an info message is wanted (Figure 13). After this the message is typed in the field below and the **Add** button is pressed.

The info messages can be **added** and **deleted** by selecting the desired number from the drop-down menu to the “Enter number” field and clicking the **Show** button. The current message can be edited by changing the messages in the text field and then clicking the **Change** button, which will save the changes made. When wanting to delete a message from a number, the **Delete** button is pressed at this point.

Please note!

Info messages can be created only for numbers that exist in the switchboard attendant’s number group. If two attendants have the same number in their number groups, the same message will be displayed to both of them.

4.5 CallCenter

The CallCenter service can be activated when there are several switchboard attendants in the system simultaneously. The number of the switchboard has to be defined in the system in order for the service to work. The switchboard number is a number that is called from outside of the company and is generally given out as the company switchboard number.

The CallCenter service offers a function that distributes incoming calls between the switchboard attendants logged in at the same time. When the service is not on, the phones of all the attendants ring simultaneously. In this case the call is taken by the attendant who gets there first.



The CallCenter can be activated in the Operator services in the *Settings* section (Figure 12). This section allows general definition of whether the CallCenter is in or out of use. When the button says **Activate CallCenter**, the CallCenter is out of use. When the button says **Disable CallCenter**, the service is in use.

When introducing the CallCenter service for the first time, a number group to the switchboard number must be defined first. In the *Operator services* section (Figure 11), first select the switchboard number in the menu and then click the **Show** button. Only the internal and external numbers for the switchboard number itself must be added to the number group. The adding of numbers is explained in section 4.3. After this the **Add to CallCenter** button is pressed (Figure 13).

When adding switchboard attendants to the CallCenter, first use the drop-down menu in the Operator services section (Figure 12) to select the number of the switchboard attendant for whom a CallCenter is to be activated. After this the **Show** button is pressed, which will allow adding numbers in the number group of the attendant. Each attendant included in the CallCenter must always have **the internal and external number for the switchboard number** in his/her number group. In addition, the number group must include **the internal and external number for the switchboard attendant him/herself**. Other numbers are not essential for the CallCenter to work, but when wanting the switchboard attendant also to supervise the calls of other switchboard attendants or other users, also the numbers for these are added in the number group. Finally the **Add to CallCenter** button is pressed (Figure 13), in order to activate the service to the switchboard attendant in question.

After defining the number group it is possible to select whether the switchboard attendant has the CallCenter in or out of use. The same window (Figure 13) is used to select the button **Remove from CallCenter** or **Add to CallCenter**. In the window, the location of the buttons displays the text "CallCenter disabled", when the CallCenter is generally not activated. The CallCenter can then be activated by clicking the **Activate CallCenter** button in the *Settings* section (Figure 12).

4.6 Night switch

The switchboard attendant who leaves work last has the possibility to activate the Night switch function when leaving work. When the function is activated, all the calls coming to the switchboard number are automatically directed to the night switch number.

The system administrator can change the night switch number through the *Settings* section. The desired phone number is entered in the text field and the **Change** button is pressed.

5 LOGGING OUT

Logging out is done by clicking the Log out button in the top right corner of the *System admin* page (Figure 2). After logging out, the Login page will open (Figure 1), and a new user can log in.



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| | |
|---|--|
| Active call | Call that is active on the switchboard table. |
| Additional info field | Displayed when the mouse is clicked once over the name of a person in the user information. |
| Attended transfer | Switchboard attendant transfers a call to another number by putting the call on hold and calling the number first. |
| Available status | User is logged in to the system, and is not occupied at the time. |
| Away status | User is not logged in to the system. |
| Busy status | User is logged in to the system but is occupied at the time either by phone or for some another reason. |
| Call group | Icecom SwitchBoard server feature, meaning call group. |
| Call queue | The term comprises both the Incoming calls queue and Queued calls queue. |
| Channel agent | User agent that is used to make calls from the switchboard table. |
| Common prefix number for the extensions | Normal phone number without extension (for example: when normal phone number is 4444111, the prefix is 4444). |
| Hold | Call can be placed on hold to wait for further actions. |
| Icecom SwitchBoard server | Server, where the switchboard software resides. |
| Icecom SwitchBoard web user | All switchboard attendants and power users. |
| Incoming call | New call coming to the system. |
| Info message | Info message is an extra qualifier created to help the switchboard attendant, containing additional info on the number to which a call was placed. |
| Normal transfer | Switchboard attendant transfers a call to another number without calling it first. |
| Number group | Numbers under the supervision of a switchboard attendant. |
| Phonebook | The phonebook is used to save the information on everybody except the Icecom SwitchBoard web users. |



| | |
|---------------------------------------|--|
| Pickup group | Icecom SwitchBoard server feature, referring to call pickup group. |
| Power user | UserBoard user. |
| Presence status | User's presence status is shown in the user information on the switchboard table. The possible presence statuses are: Available, Busy, At lunch, Do not disturb, Be right back, and Away. |
| Incoming calls queue | All new calls are transferred to this queue along with calls that were unsuccessfully redirected to another number. |
| Queued calls queue | Queue to which calls handled by the switchboard attendant are transferred. |
| Switchboard attendant | User with defined number groups for an internal and external number. |
| Switchboard table | Switchboard attendant's WWW browser based user interface. |
| Switchboard number (Global number) | Phone number that is called from outside of the company; the number is common to all switchboard attendants. |
| System administrator | User with rights to connect the system to the Icecom SwitchBoard server, add new users, set up call messages and number groups, make additions to the Phonebook from Excel tables, activate the CallCenter service for the switchboard attendant and change the night switch number. |
| Timed transfer | Feature of the phone, allowing definition of how long the phone will ring before being redirected for example to an answering machine. |
| User | The term is used in this manual to refer to all users. |
| User information | Located at the top of the switchboard table and the phone table; includes both the information and phonebook of the Icecom SwitchBoard web users. |
| UserBoard | Power user's WWW browser based user interface. |
| Virtual switchboard attendant | The user level that is configured only for retransferring the calls that are arriving to the main switchboard number, to switchboard attendant(s). |

