Dealer Services

Administrator Guide

IPT Enterprise Administration

Applies to Integrations with Call Intelligence, CTI Desktop, Phone Lead Generator, and Network Phone Mobile App

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Introduction

The Enterprise Administration application allows all Call Intelligence and Phone Lead Generator users to view and update their own login information. Users access the website through the My Network Phone website landing page or from the Call Intelligence or Phone Lead Generator Settings page.

Users who are assigned the Enterprise Administrator role are provided with access to the following areas that impact users' logins:

- Enterprises
- Groups
- Departments
- Employees
- Users
- Applications
- DMS
- Call Managers
- Support

An Enterprise Administrator can use these additional options to:

- Manage their enterprise instances, groups, departments, and employees.
- Manage all users for their enterprise, which includes changing user details, assigning roles, linking the user to an employee record, assigning phone lines, entering Call Source credentials, and assigning department permissions.
- View a list of and administer their Call Managers (which includes Call Recording and CTI Desktop servers) – for Network Phone Enterprise clients only.

This guide provides step-by-step instructions for using the Enterprise Administration application to complete the above mentioned tasks.

For information on using the Call Intelligence application, refer to the *Call Intelligence 7.9 User Guide*.

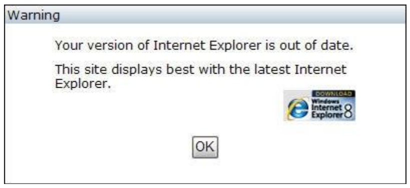
For information on using the Phone Lead Generator application, refer to the *Phone Lead Generator Administration Guide* and *Phone Lead Generator Quick Reference Guide*.

Accessing Enterprise Administration

To access the Enterprise Administration application:

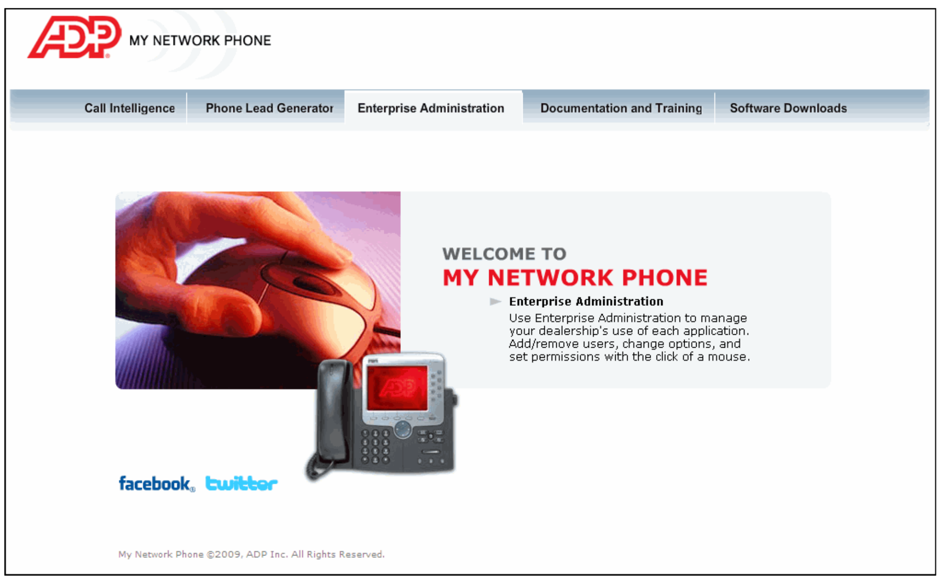
1. Open a browser window (such as Internet Explorer).

   ***Note:** ADP requires you to use Microsoft® Internet Explorer® (IE) 7.0 or higher. If using IE 6.0, you will receive the following message:*

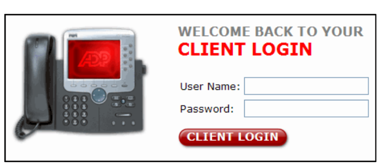


   To upgrade your browser, go to the Microsoft Internet Explorer download page: http://www.microsoft.com/download/en/ie.aspx?q=internet+explorer&WT.mc_id =MSCOM_EN_US_DLC_ICONNAV_121LSUS007796

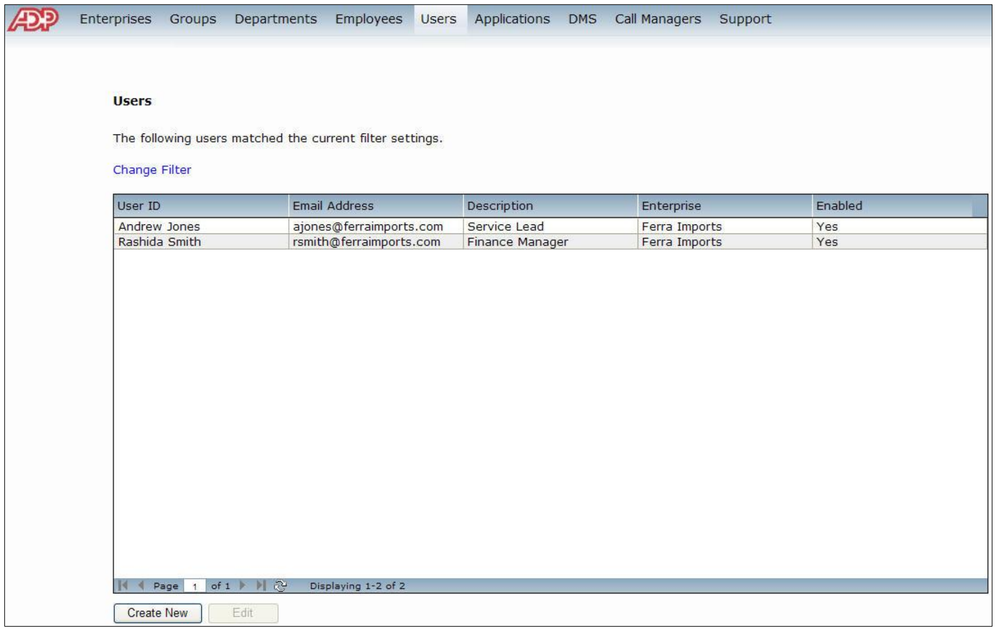
2. Enter **https://mynetworkphone.com** in the Address field of your browser window. The My Network Phone landing page displays as follows.



3. Click **Enterprise Administration**. An ADP Login page displays.



4. Type your assigned user name and password in the fields provided, and then click **Client Login** to log in. The Logins – Enterprise Administration page displays (see example below).



The Enterprise Administration main menu provides options for managing groups, departments, employees, Call Managers, and users; viewing applications; and viewing DMS accounts. Refer to the following sections for detailed instructions on using these options.

Managing Groups

Groups allow your dealership to define and segment your operations just like you do in your day-to-day business. Groups can correspond to the brands your dealership carries and then you can create departments to further organize your dealership's groups in Call Intelligence. For example, the ADP Motors Group could have Acura, Honda, and Toyota as individual groups.

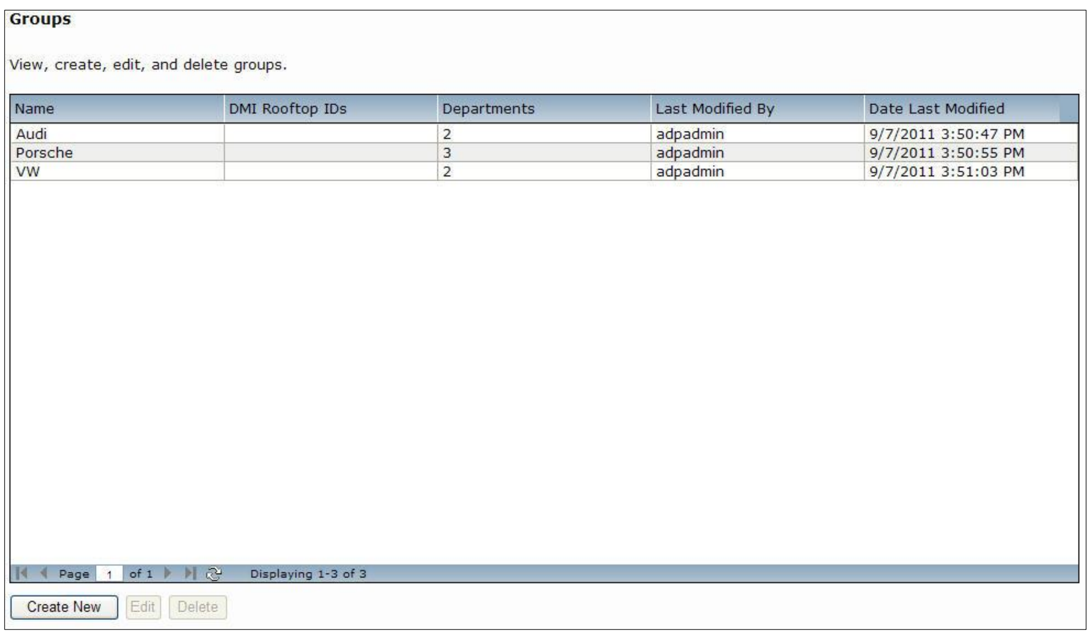
The Groups option allows you to:

- View a list of groups associated with an enterprise
- View the number of departments in a group
- View who modified group information and when
- Associate a DMI Rooftop ID to a group
- Edit and/or delete a group

Viewing Groups

To view a list of the groups for your enterprise:

1. If necessary, access *Enterprise Administration*.
2. Click **Groups**. The Groups page displays.



Creating New Groups

Note: Creating groups does not apply to Broadsoft customers.

To create a new group:

1. If necessary, access *Enterprise Administration*.
2. Click **Groups**. The Groups page displays.
3. Click **Create New**. The New Group dialog displays.

4. Enter the *group name* in the Group Name field.
5. **OPTIONAL**: Enter the *DMI Rooftop ID* in the DMI Rooftop IDs field. This field is only for dealerships using the Network Phone mobile app for inventory searches. Each group must have its own, unique DMI Rooftop ID.

   Tip*: Make sure you enter the correct DMI Rooftop ID; if it's incorrectly entered the mobile app cannot search the inventory and an error will result.*

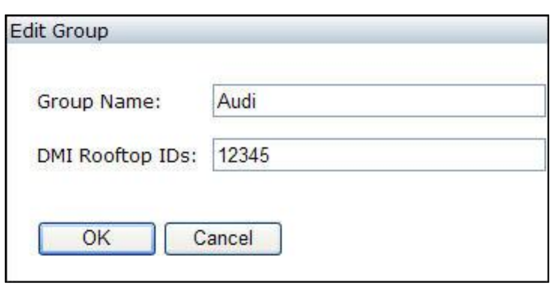
6. Click **OK**.

Updating Groups

From the Logins – Enterprise Administration page, you can select an existing group to view and edit the group's name update as follows:

To edit a group's details:

1. If necessary, access *Enterprise Administration*.
2. Click **Groups**. The Groups page displays.
3. From the Groups page, select the group you want to edit by clicking in the row that contains the enterprise's information. The row becomes highlighted in green.
4. Click **Edit**. The Edit Group dialog displays.



5. Edit the group information as needed.

Warning! If your dealership uses the Network Phone mobile app, deleting the DMI Rooftop ID will prevent users from searching the inventory.

6. Click **OK**.

Managing Departments

Setting up departments in the Enterprise Administration application lets your dealership further control which departments belong to certain groups. For large organizations, assigning departments to groups lets you tailor the brand's specific offices and operations to their assigned group.

For example, if your dealership sells multiple brands, Call Intelligence allows the creation of individual groups and their individual departments instead of just having all departments (for example, instead of sales, you could create Acura Sales and Honda Sales departments) fall under one group (for example, ADP Motors).

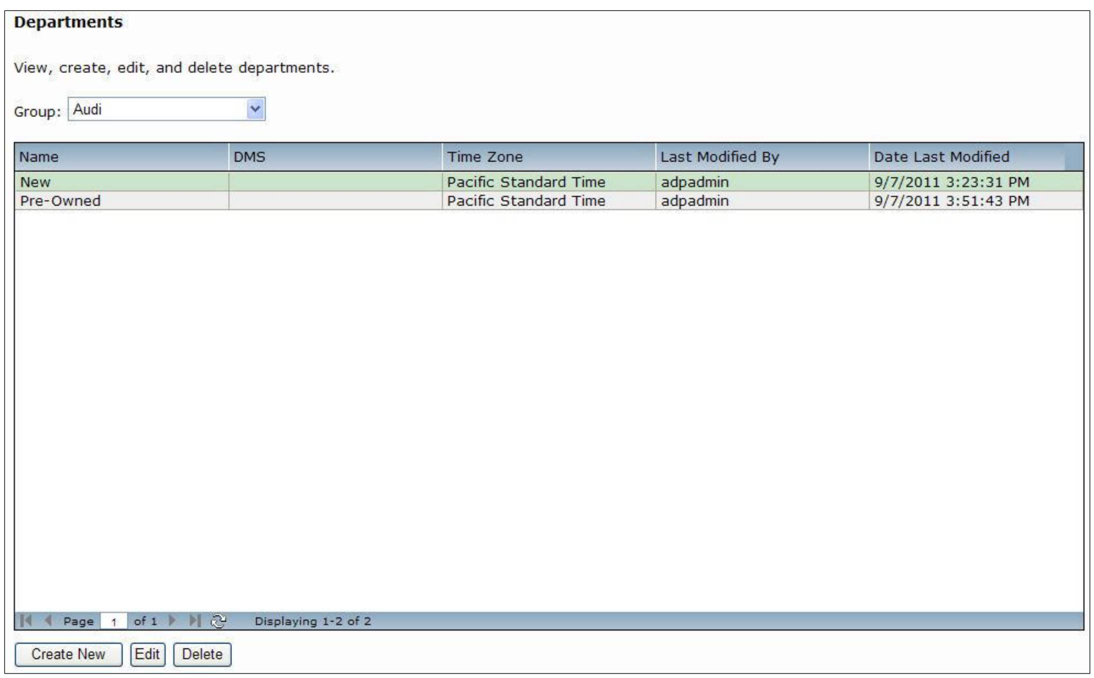
The Departments option allows you to:

- View a list of your dealership's departments
- View when a department's information was updated and who updated it
- Create a new department
- Update a department's information with a new name, DMS account, or time zone

Viewing Departments

To view a list of departments:

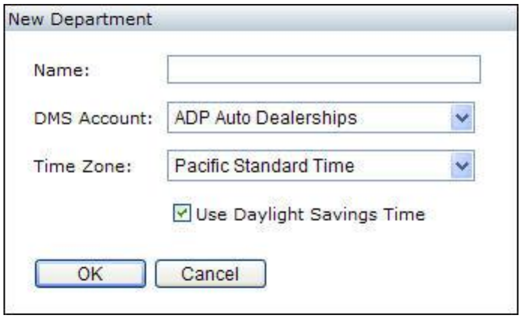
1. If necessary, access *Enterprise Administration*.
2. Click **Departments**. The Departments page displays for the selected enterprise.
3. Note the Group dropdown, which allows you to select the group whose departments you want to view. If no departments exist for the group, a message displays indicating no departments are defined and you can create new departments. For information on creating new departments, refer to the next section, *Adding New Departments*.



Adding New Departments

To add a new department:

1. If necessary, access *Enterprise Administration*.
2. Click **Departments**. The Departments page displays.
3. Select the group you want to add a department to from the *Group* dropdown menu.
4. Click **Create New**. The New Department dialog displays.



5. Enter the *name* in the Name field.
6. Select the DMS account associated with this department from the DMS Account dropdown.
7. Select whether you want to use Daylight Savings Time.
8. Click **OK**.

Updating Departments

From the Logins – Enterprise Administration page, you can select an existing employee to view and then update as follows:

- Edit the department name, DMS account association, and time zone

Editing Department Details

To edit a department's details:

1. If necessary, access *Enterprise Administration*.
2. Click **Departments**. The Departments page displays.
3. From the Departments page, select the department you want to edit by clicking in the row that contains the enterprise's information. The row becomes highlighted in green.
4. Click **Edit**. The Edit Department dialog displays.
5. Edit the department information as needed.
6. Click **OK**.

Managing Employees

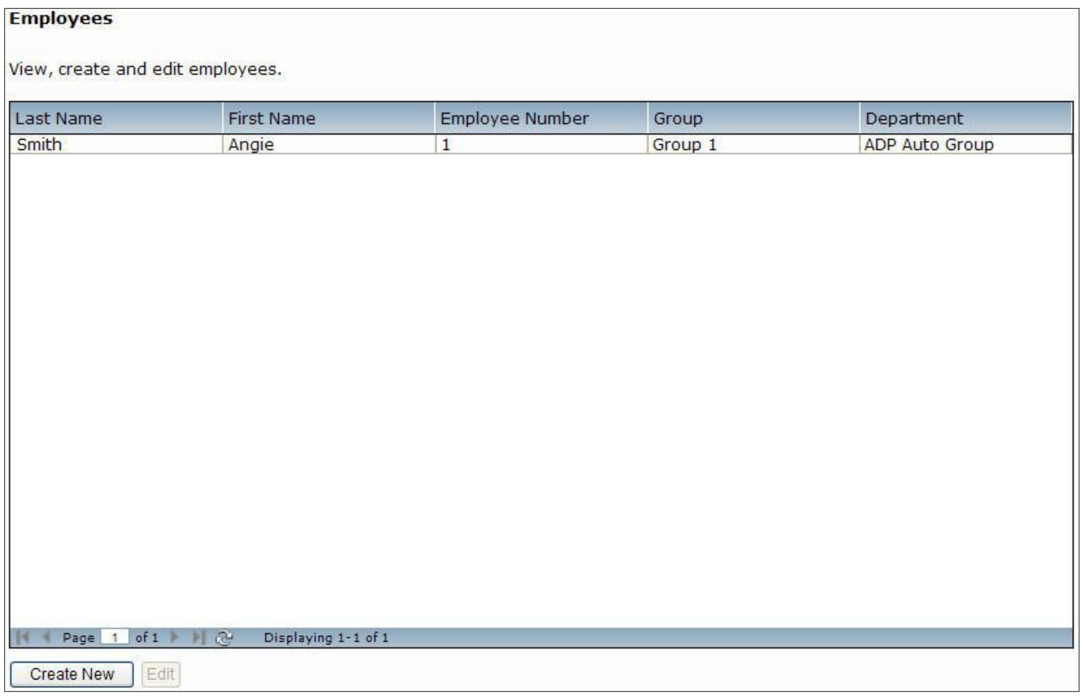
The Employees option allows you to:

- View a list of employees for your enterprise
- Add a new employee for your enterprise
- Assign an employee number to a new or existing employee
- Update an employee's information with a new group or department

Viewing Employees

To view a list of the user logins for your enterprise:

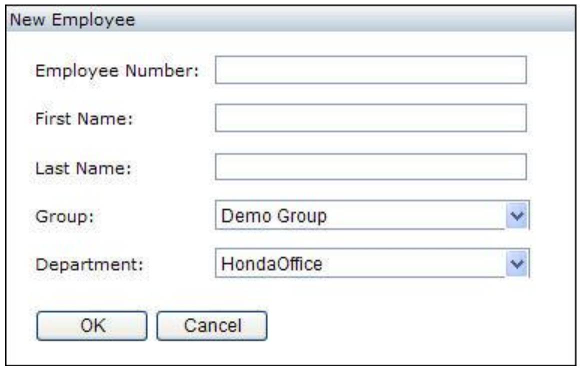
1. If necessary, access *Enterprise Administration*.
2. Click **Employees**. The Employees page displays.



Adding New Employees

To add a new employee:

1. If necessary, access *Enterprise Administration*.
2. Click **Employees**.
3. From the Employees page, click **Create New**. A New Employee dialog displays.



4. Enter the *employee number* in the Employee Number field. The employee number convention is tied back to an actual employee number. Each dealership uses its own employee numbering system. For example, your dealership might start with 001, 002, and so forth whereas other dealerships may use 1111, 2222, and so forth. If you are adding employees for the first time, you should verify the employee numbering convention.
5. Enter the employee's *first name* in the First Name field.
6. Enter the employee's *last name* in the Last Name field.
7. From the **Group** dropdown, select the group associated with the employee.
8. From the **Department** dropdown, select the department associated with the employee.

   Note: The departments that display are determined by the group you select in Step 7,

9. Click **OK**.

Updating Employees

As with any dealership, information changes. In the case of employees, they may move to a different group or department. With Call Intelligence, you can update that information in real time using the Edit Employee feature.

From the Logins – Enterprise Administration page, you can select an existing employee to view and then update as follows:

- Edit the employee number, and first and last name
- Update the group and/or department associated with the employee

Editing Employee Details

To edit the employee details:

1. Click **Employees**.
2. Select the employee you want to edit by clicking in the row that contains the employee's information. The row becomes highlighted in green.
3. Click **Edit**. The Edit Employee dialog displays.
4. Edit the employee information as needed.
5. Click **OK**.

Managing Users

The Users page allows you to:

- View a list of the user logins for an enterprise
- Add a new user login for an enterprise
- Delete a user login from the enterprise

  Important! You must call ADP Technical Support / ATAC to perform this request.

- Update a user login with a new e-mail address or time zone
- Reset the password for a user login
- Update the roles for a user login
- Assign phone lines to a user
- Add or update the user's Call Tracking login
- Assign departments to a user

Viewing Users

To view a list of users for your enterprise:

1. If necessary, access *Enterprise Administration*.
2. Click **Users**. The Users page displays. By default, the page displays a list of all users by user name – this includes enabled and disabled logins. To search for users using a different search type, continue with these steps; to select a user from the default search results, go to Step 3.
   a. Click **Change Filter**.
   b. From the Search Type dropdown, select **User name** or **Email**.
   c. OPTIONAL: Enter *additional search information* in the Search Criteria field. For example, if you are looking for users who are Service Leads and their user details have that information, enter Service Lead).

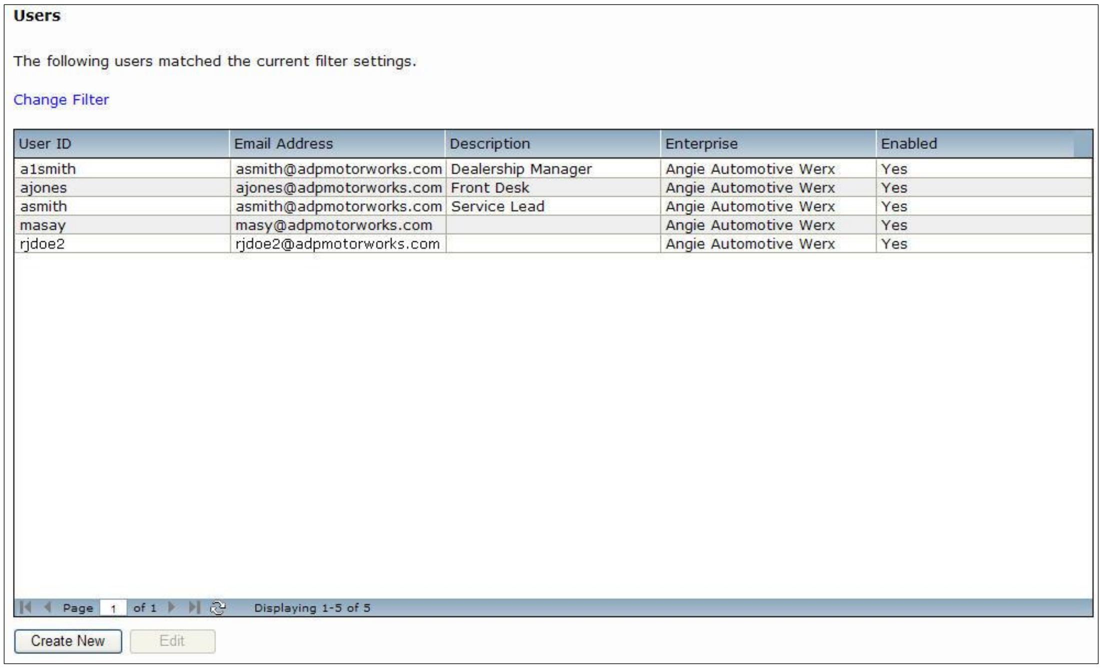
      To display results for a specific user, type *one or more of the beginning characters* of the user name or e-mail address in the Search Criteria field.

      Note: The Search Criteria field does ***not*** *accept wildcard (*) searches.*

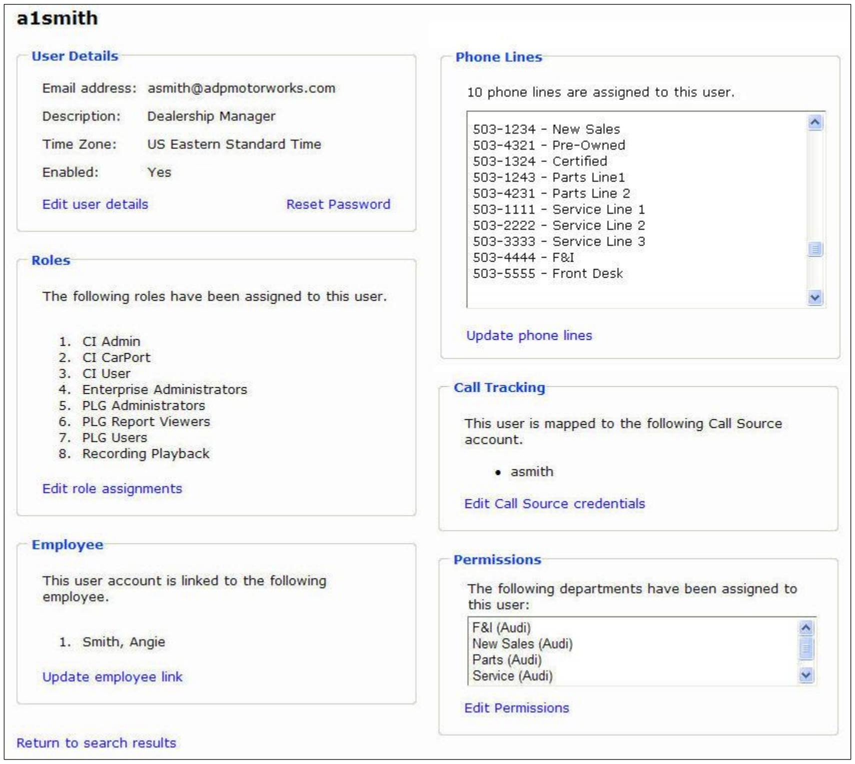
   d. From the Show dropdown, All Logins is the default search. To change the default, select **Enabled Logins** to search for enabled logins or select **Disabled Logins** to search for disabled logins.
   e. Select *Search all Enterprises* to search all enterprises in the system. Only use this option if you are unsure if the search result you need is not available in the enterprise you selected as this search returns many results, which may take time.

      Tip: If you want to change the User Search criteria, click Reset and you can re-select and/or re-enter the search criteria.

3. Click **OK**. A Search Results list displays with the user logins that matched the search items.



4. To view user details, click the row that contains the user you want to edit. The row becomes highlighted in green.
5. Click **Edit**. The user's corresponding page displays.

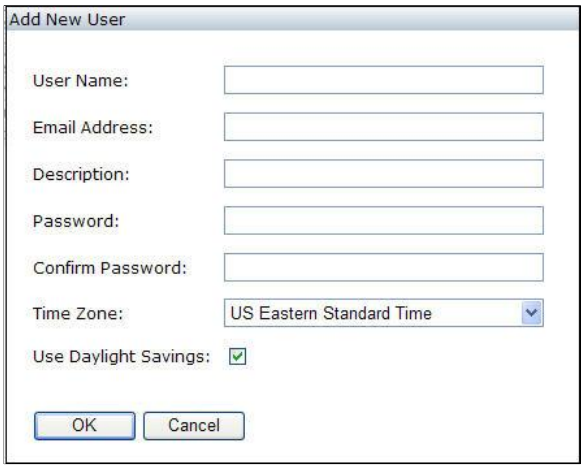


6. Click **Return to search results** in the bottom-left corner to return to the Users' page.

Creating a New User

To create a new user:

1. If necessary, access *Enterprise Administration*.
2. Click **Users**. The Users page displays.
3. Click **Create New**. An Add New User dialog displays.



4. Enter the following information:
    - User Name
    - Email address
    - Description

      Note: This is optional. An example of a description is Service Lead or F&I Manager.

    - Password: Enter the user's *password* in the Password and Confirm fields.
5. From the Time Zone dropdown, select which time zone you want associated with the user's login.
6. Select whether you want to use Daylight Savings.
7. Click **OK**.

User Page

The user page displays a user's information and lets you edit areas associated with a user login. You can perform all administrative functions tied to this information, such as assigning a phone line or role, from this page.

The user's page is divided into six sections:

- User Details: Displays the user's name, email address, description (if created), time zone, whether the user's login is configured for daylight savings, and whether the user's login is enabled.

Note: Enterprise administrators can disable a user's login for various reasons; for example, if the user is taking a long vacation or if the employee is leaving the dealership.

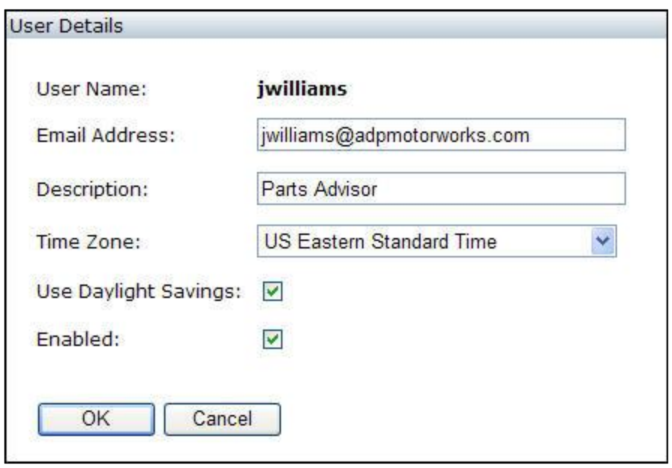
- Roles: Displays the roles assigned to the user. If no roles are assigned or if you want to add/remove roles, you can do that here.
- Employee: Displays, if applicable, the employee(s) associated with this user account. If the user is not linked to an employee, you can link them here.
- Phone Lines: Displays phone lines assigned to the user. If none are assigned, which is the case for new employees or (potentially) employees moved to another dealership or department, you can assign phone lines here.
- Call Tracking: Indicates if the user has Call Source credentials for the Call Tracking feature. If not, you can enter the credentials here.
- Permissions: Displays the departments assigned to the user. You can also assign/remove departments assigned to the user here.

Note: *You can only associate the Call Intelligence user with the phone system user after creating the user's login. For more information, refer to Assigning Phone Line Associations.*

Updating User Details

To edit a user's details:

1. If necessary, access *Enterprise Administration*.
2. Search for the user whose details you want to change.
3. From the Users page, click **Edit user details**. A User Details dialog displays.



4. Update the user's information as follows:

   Note: You cannot change the user name. If necessary, delete the user and create a new user.

   - Email address
   - Description

Note: This is optional. An example of a description is Service Lead or F&I Manager.

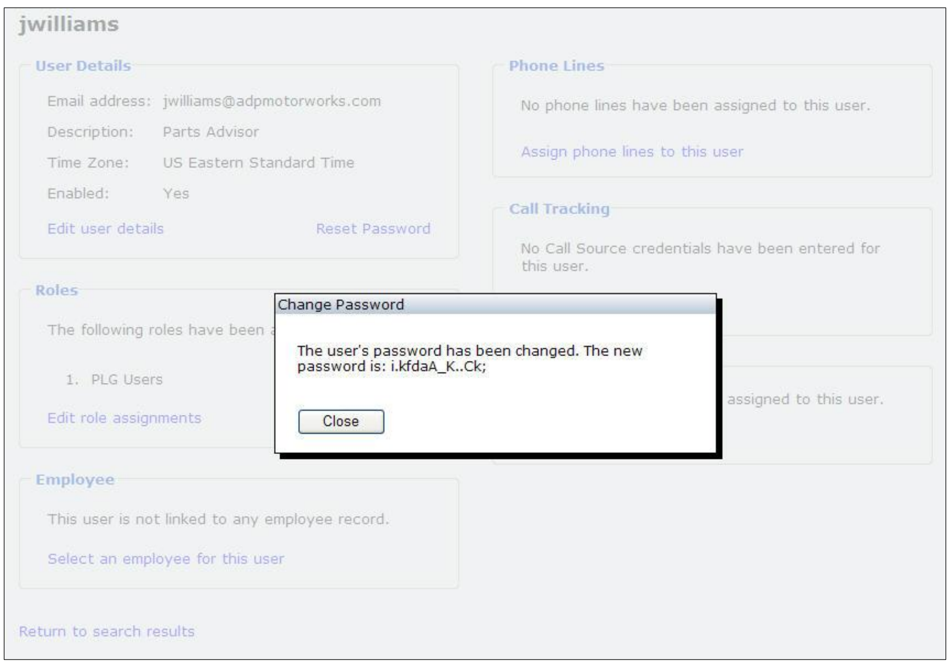
5. From the Time Zone dropdown, select which time zone you want associated with the user’s login.
6. Select whether you want to use Daylight Savings.
7. Select whether you want the user login enabled. If this option is not selected, the user cannot log in to their account.
8. Click **OK**.

Resetting Passwords

If a user forgets or loses their password, you can reset the password to enable the user to log back into the My Network Phone applications. The user can then change the temporary password as needed.

To reset a user’s password:

1. If necessary, access *Enterprise Administration*.
2. From the Users page, click **Reset Password**. A Change Password dialog displays.



3. Click **Close** to close the dialog.

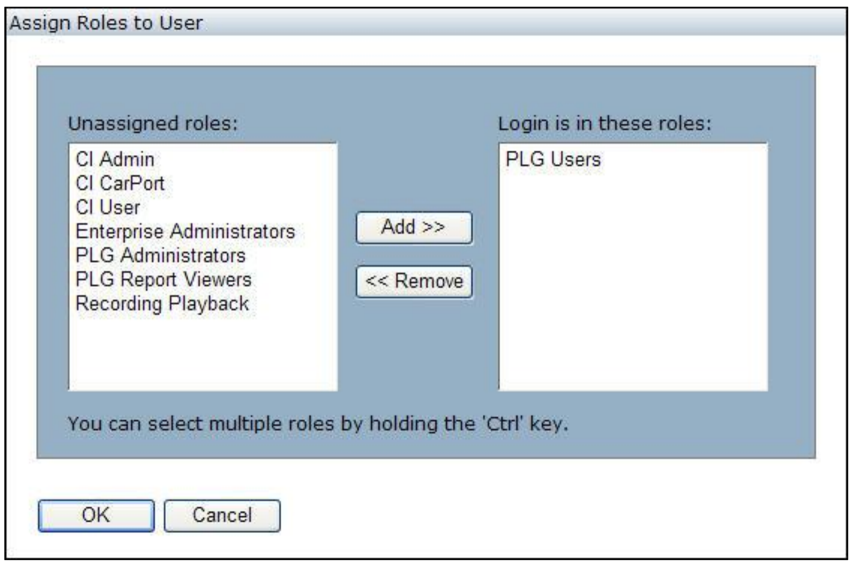
   A Reset Password e-mail message is sent to the user, which provides the new password and a link to the Enterprise Administration Logins page for changing the password.

Assigning Roles

Roles assigned to a user allow them access to specific application features. For example, a user assigned the Recording Playback role can listen to call recordings in Call Intelligence reports.

To edit a user's roles:

1. If necessary, access *Enterprise Administration*.
2. Search for the user whose details you want to change.
3. From the Users page, click **Edit role assignments**. An Assign Roles to User dialog displays. As mentioned previously, if the enterprise was created with Phone Lead Generator as an associated application, the PLG Users role is automatically assigned to the user as shown in the following screenshot:



4. Assign the role(s) for the user login as follows:
   a. Under Other available Roles, click to select the roles for the user as follows. To select more than one role, press the Ctrl key and click each role you want to assign.
      – Click **CI Admin** to set up a standard user with administrative privileges.
      – Click **CI CarPort** to set up generic user permissions for a system requiring database access. Used for SMDR integration to CRM systems.
      – Click **CI User to** set up a standard user without administrative privileges. Assign this role to a new Phone Lead Generator user if your dealership has a Network Phone Enterprise (Onsite) system.
      – Click **Enterprise Administrators** to allow the user to manage user logins and DMS accounts for the enterprise.
      – Click **PLG Administrators** to set up a standard PLG-only user with administrative privileges.
      – Click **PLG Report Viewers** to set up a use who can only view PLG reports.

   – Click **PLG Users** to set up a standard PLG-only user.

     Note: If an enterprise is initially created with the Phone Lead Generator application, by default, this role is associated with the user.

   – Click **Recording Playback** to allow the user to play back call recordings (for Call Intelligence ASP Package users only).

b. Click **Add** >> to move the role(s) to the Login is in these roles list.

   To remove a role, click to select the *role* from the **Login is in these roles** list, and then click << **Remove**. The role is moved to the Unassigned roles: list. To remove more than one role, press the Ctrl key as you make your selections.

c. Click **OK** to save the assigned role(s).

   If you are mapping the user to a Call Tracking login, refer to *the Updating Call Tracking*.

   Note: If you added a login for a standard Call Intelligence user (CI User role), you must assign user permissions in Call Intelligence to specify the groups and departments the user has access to.

Linking a User to an Employee Record

When a user is created, you can associate the account with an employee. For example, if you create a user for the front desk using Front as the first name and Desk as the last name, you can link one or multiple employees to that user account.

To link an employee to a user:

1. If necessary, access *Enterprise Administration*.
2. Search for the user whose details you want to change.
3. From the Users page, click **Update employee link**. The Link Employee to User dialog displays.

4. Select the employee you want to link to the user account or select (none) and then skip to Step 5. If the employee is not listed, add a new employee by doing the following:

    a. Click **Add New**. The New Employee dialog displays.
    b. Enter the *employee number* in the Employee Number field.
    c. Enter the employee's *first name* in the First Name field.
    d. Enter the employee's *last name* in the Last Name field.
    e. From the **Group** dropdown, select the group associated with the employee.
    f. From the **Department** dropdown, select the department associated with the employee. Click **OK**. The new employee's name displays in the Employee area of the user's page.

5. Click **OK**. The employee's name displays in the Employee area of the user's page.

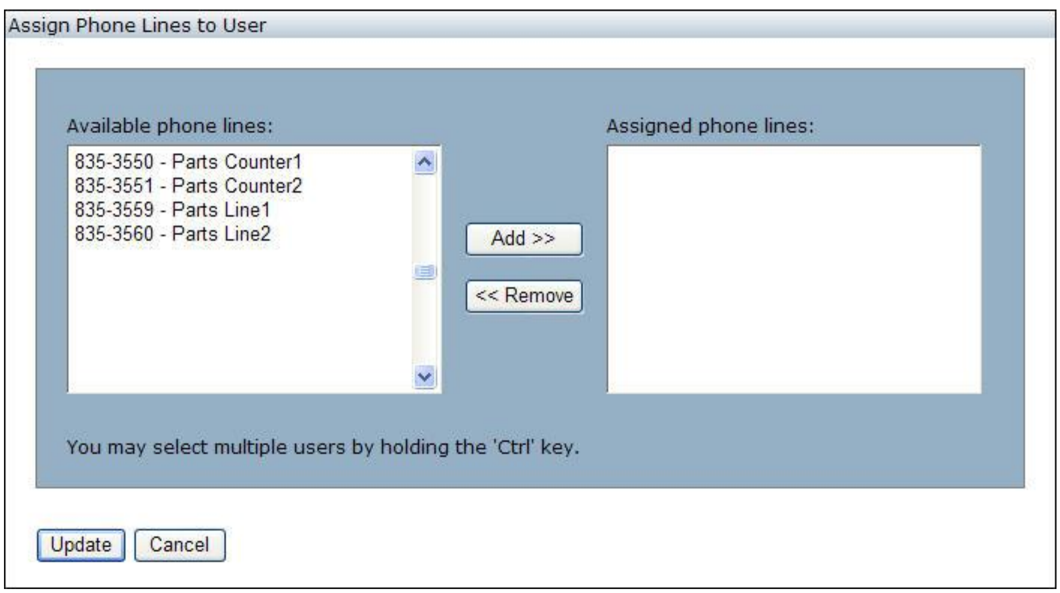
Assigning Phone Line Associations

For the Call History widget on the Call Intelligence home page to display data for the user, you must associate the Call Intelligence user with the phone system user.

To add or update the association between the user's login and the phone line:

1. If necessary, access *Enterprise Administration*.
2. Search for the user whose details you want to change.
3. From the Users page, click **Assign phone lines to this user**. The Assign Phone Lines to User dialog displays.

   Note: If the user was set up and a phone line assigned, click Update.



4. Click **Add** >> to move the phone line(s) to the Assigned phone lines: list.

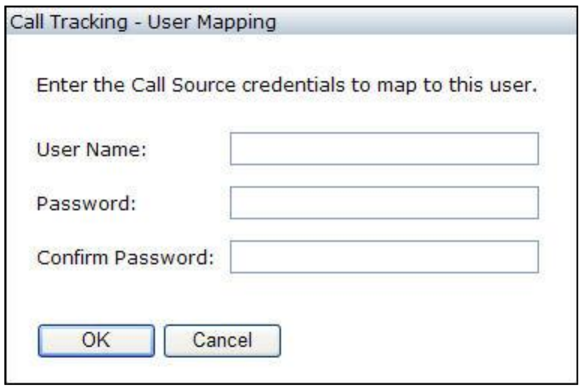
   To remove a phone line, click to select the *phone line* from the Assigned phone lines: list and then click << **Remove**. The phone line is moved to the Available phone lines: list. To remove more than one phone line, press the Ctrl key and click as you make your selections.
5. Click **Update**.

Adding Call Tracking Credentials

Note: *Call tracking logins are only required for customers who purchased Call Recording for Call Intelligence ASP.*

To add call Source Credentials to a user's Call Tracking login:

1. If necessary, access *Enterprise Administration*.
2. Search for the user whose details you want to change.
3. From the Users page, click **Add Call Source credentials**. The Call Tracking – User Mapping dialog displays.



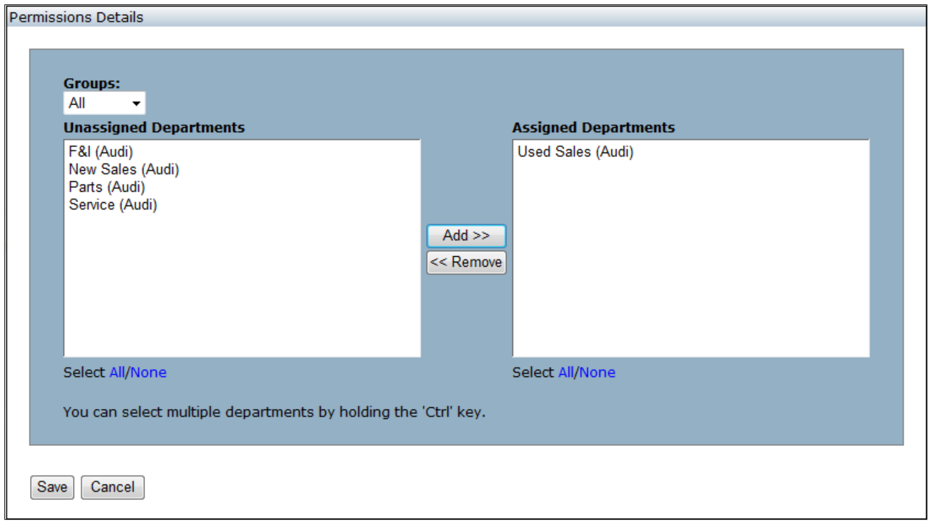
4. Update the Call Tracking login as follows (see example below):
   a. To change the user name, type a new *User Name* in the field provided.
   If an e-mail user name is used, users can use the e-mail user names without the @ address extension.
   b. To change the password, type the new *password* in the Password and Confirm Password fields.
5. Click **OK** to save the Call Tracking credentials.

Updating Permissions

You can associate departments to the user, giving them permission to access that department's call records.

To update a user's permissions:

1. If necessary, access *Enterprise Administration*.
2. Search for the user whose details you want to change.
3. From the Users page, click **Edit Permissions**. The Permissions Details dialog displays.



4. From the Groups dropdown, select which group's departments you want to view. By default, All is selected.
5. Click **Add** >> to move the unassigned department to the Assigned Departments list.

   Tip: Click All to select all departments or click None to remove all departments selected.

   To remove a department, click to select the *department* from the Assigned Departments list, and then click << **Remove**. The phone line is moved to the Available phone lines: list. To remove more than one phone line, press the Ctrl key as you make your selections.
6. Click **Save**.