SourceTech Tellus Web 3.0

Userguide

2016

SourceTech Tellus Web Admin

Revision 2016-01

Log in

Start by browsing to Tellus Web. You can get the URL from you system administrator.

The text is displayed in the default language that your browser has. If your language is not available in Tellus, all text will be displayed in English.

1. Write your user name, this is given to you by the system administrator.
2. Enter your password, this is given to you by the system administrator.
3. Tick the box if you want your user name and password to be saved.
4. Click on the link if you have forgotten your password. The system will generate a new password and send it to the email address that is entered in the system.

You need to have a valid email address in Tellus for this to work.

Dashboard

This is the first page you will see when you log in to Tellus Web.

1. You can click on the "Tellus globe" in the top left corner in any page on Tellus Web. You will then be redirected to the dashboard. The globe will be blue when the dashboard is active and grey when you are on any other page.

2. The menu in Tellus web is depending on licenses and rights, therefore the menu can vary.

3. In this list you will get a summary of your upcoming absences. If you click on the red icon to the right you can delete the absence.

4. This list shows five of your colleagues. These are five of the users you are following on the micro blog and the ones with the latest updates. In this view you will be able to see if the person has an active absence and if you hover on the icon you will get information about the absence. If you click the users name you will see the details for the user.

5. The logged in user will see their name in this display.

6. You will change you profile by clicking on the different phones, this is an easy way to decide where you should receive your phone calls.

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7. These six different icons will take you to:

		Our website sourcetech.se
		Our SourceTech Portal.
		Our videos about Tellus Web.
		Our manuals about the Tellus-suite.
		Download our application MyTellus (view page 32)
		Log out from Tellus Web.

8. In this pane you will see five messages from your inbox. If you click the message you will be redirected to the message pane.

9. Here you will see a summary of five upcoming birthdays. The present will change color when the date for the birthday is getting closer.

Menu
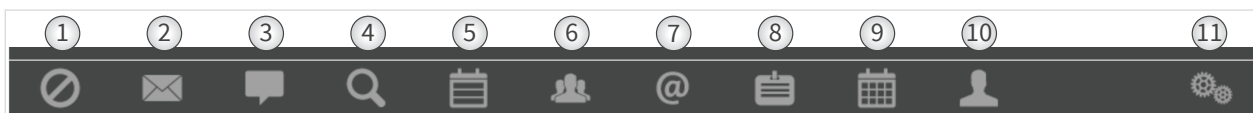
The menu in Tellus contains 11 icons that gives you access to all functions you might need. Depending on the rights and licenses the menu in your browser may differ from the one shown here.
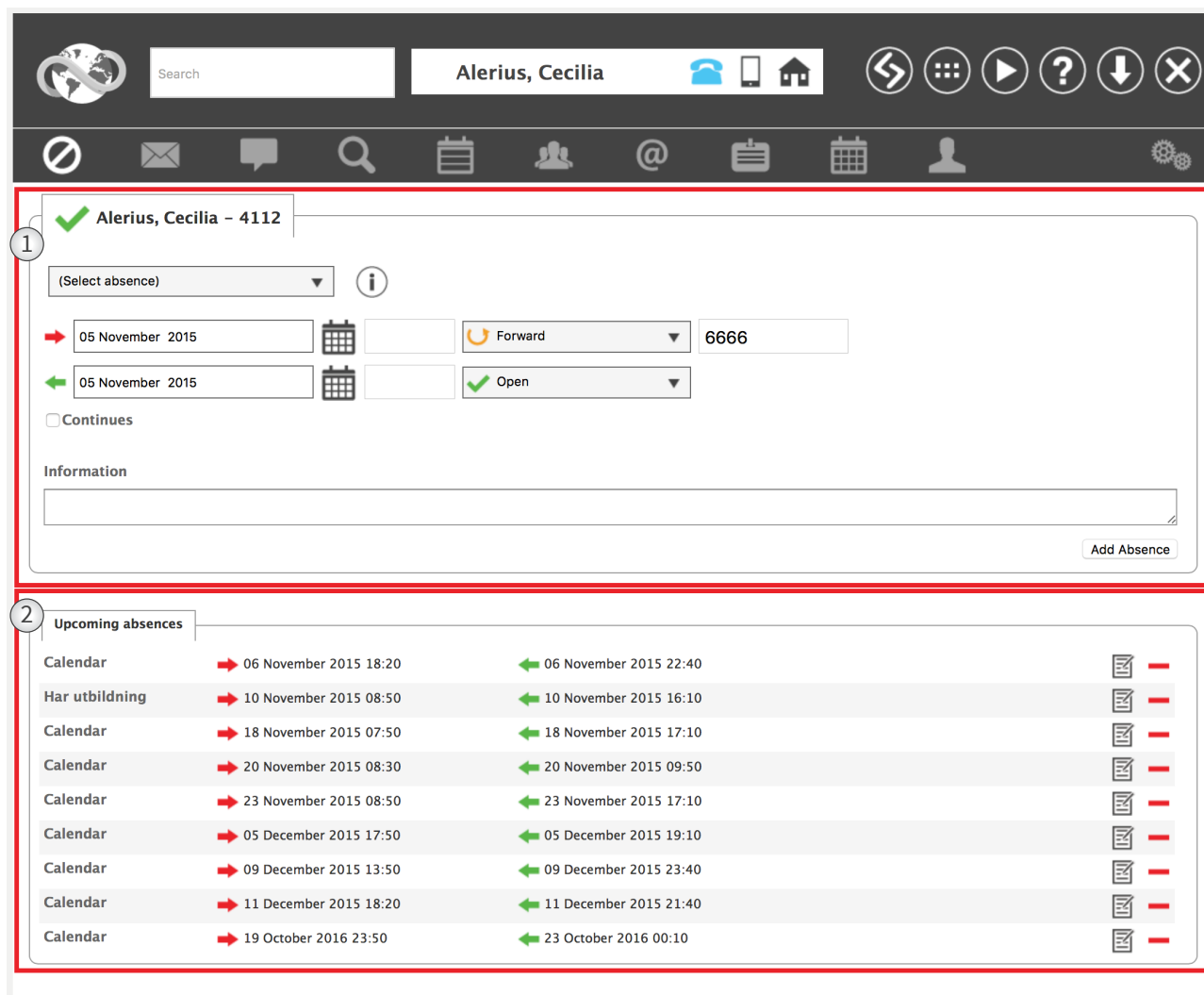
1. Absences - Handle you absences on this page. See page 9.

2. Messages - All Tellus messages will be shown in this page, from the operator, colleagues and the voice mail system. See page 14.

3. Micro blog - Update your status and let you colleagues know what you are up to. See page 16.

4. Search - Search for colleagues. See page 18.

5. Schedule - Create you own working schedule that automatically will handle your extension. See page 23.

6. User groups - Create searchable user groups. See page 26.

7. Contacts - Gather all the companies external contacts in one place. See page 27.

8. Visits - Pre register your visitors for faster handling at the reception.[1] See page 29.

9. Resource booking - Reserve the companies resources directly in the web client.[2] See page 31.

10. Settings - Handle you account. See page 33.

11. Administration - Administrate the system here. [3]

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[1] Requires license for Tellus Visit.

[2] Requires license for the resource booking.

[3] Requires specific rights in the Tellus system.

Absence management

At this page you can handle your absences. This is a good way to increase the service level at the company. Your customers and colleagues will get information about where you are and when you can't answer the phone.

1. Use this form to create a new absence.
2. In this pane you can see your active and upcoming absences. If you have more than 20 upcoming absences you will be able to choose if you want to display 20, 50, 100 or all upcoming absences.

Add absence

The first thing you do when you are about to create an absence, you choose the absence code. When you have done this, the system will fill in som information automatically.

1. Choose absence code in the list. If you want to know what trigger words you have in the system, click on the grey info button next to the list.
2. Choose the time and date for the beginning of your absence. Also choose what you want your start action on your phone to be.
3. Choose the time and date for the ending of your absence. Also choose what you want your end action on your phone to be.
4. Tick this box if you don't want the absence to have an end date. This is often used when the user is sick.
5. Enter information about the absence that can be good for operators and colleagues to know about your absence.
6. Click the button to save the absence.

Handle your extension
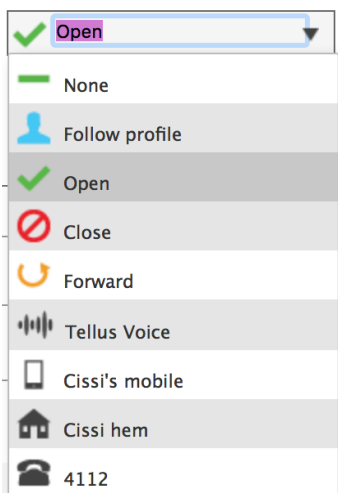
Extensions can be handled in several ways during an absence. These are the options you have on how to handle your extension during an absence.

▬	No update on the extension status will be sent to the PBX.
	This option is often used when you want to make a "soft" absence. The absence will be shown in the operator application and in Tellus Web, but your extension will be open for calls.
👤	This means that your extension will keep your standard settings. This is usually forward to voicemail.
✔	A order to open the extension will be sent to the PBX.
⊘	A order to close the extension will be sent to the PBX.
↺	This option will forward the extension to the number entered in the input field that will appear to the right. This is usually the default setting for most absence codes, the number that the extension will be forwarded to is then a voice mail or the operator.
ᯤ	This choice forwards your extension to your voicemail.
☎	You can choose to create a forwarding to this extension during the absence.
📱	If you choose this option your calls will be forwarded to this specific mobile number during the number.

Set date and time

Date

There are several ways to set the date. You can choose to click on the calendar icon and the calendar will be opened and you can choose the date from there. You can also use the arrow keys when the focus is in the input field and set the date.

Time

The system tries to interpret what you write in the text box as a time. At least two characters must be entered. For example, the text "09", "0900", "09 AM" and "09;00" will be interpreted the same way: 09:00. To enter the time 17:15 you can write "1715", "17:15", "515 PM" or "0515 PM".

When will the default times be used?

The times that are set in the system will be used when you choose the absence type.

Edit or delete absence

Active absence			
Busy	➡ 05 November 2015 10:18	⬅ 05 November 2015 12:00	📝 ➖

Upcoming absences

Calendar	➡ 06 November 2015 18:20	⬅ 06 November 2015 22:40	📝 ➖
Har utbildning	➡ 10 November 2015 08:50	⬅ 10 November 2015 16:10	📝 ➖
Calendar	➡ 18 November 2015 07:50	⬅ 18 November 2015 17:10	📝 ➖
Calendar	➡ 20 November 2015 08:30	⬅ 20 November 2015 09:50	📝 ➖
Calendar	➡ 23 November 2015 08:50	⬅ 23 November 2015 17:10	📝 ➖
Calendar	➡ 05 December 2015 17:50	⬅ 05 December 2015 19:10	📝 ➖
Calendar	➡ 09 December 2015 13:50	⬅ 09 December 2015 23:40	📝 ➖
Calendar	➡ 11 December 2015 18:20	⬅ 11 December 2015 21:40	📝 ➖
Calendar	➡ 19 October 2016 23:50	⬅ 23 October 2016 00:10	📝 ➖

You use the icons on the right to edit or delete an absence. Use the icon with a paper and a pen to edit or the minus icon to delete.

1. Edit the absence. Edit the information you want and then press update.
2. Click here to delete the chosen absence.

Messages

All users has a personal inbox in Tellus Web. In this inbox you will get messages from operators and colleagues.

(You can also get the messages to your regular email and as an SMS if your system has the license for SMS).

1. Click here to compose a new message.
2. Browse your folders in this tree view.
3. All your messages will be listed here. If the envelope is opened the message has been read. You can also see that the message has been sent by the operator application, then the icon to the left of the envelope is a headset.
4. The content of the marked message will be shown here.

Compose message

Use the link "Compose" to send a new Tellus message. (Number 1 on the previous picture).

1. Choose what type this message should be. The choices you have are depending on the licenses in the system.
2. Choose how you want the message to be sent. The message will always be sent as a Tellus message. The choices you have are depending on the licenses in the system.
3. Use the plus sign to add recipients to your message. If you want to remove a recipient, mark the user in the list and press the minus icon.
4. Enter the subject for the message here.
5. Write your message and press send.

Change state

When you have read a message it is automatically marked as read the next time you load the message page. To change the status of the messages, select one or more messages and use the buttons above.

Micro blog

1. The first pane you will see in the micro blog is your feed. Here are all the updates of the users you follow in a list, you will also be able to see their presence status and if you hover over the icon you will get information about the absence.

2. Here you can see information about your micro blog. How many users you are following and how many followers you have. You can also see how many blog updates you have made. If you press the link "Following", "Followers" or "Updates" you will be redirected to a summary.

3. The users with the most followers will be listed under the category "Popular bloggers", press the green plus icon to start following the user.

4. You can search for specific users here. Click on the green plus icon next to the name to start following the user.

Create a post

Type the text you want to publish and click on "Update".

When you have updated the feed you will be able to see your blog post. If you want to delete your update you just press "Updates" in the user part and press the red icon next to your update. The information will be displayed in the details pane in Tellus Web and in the operator application.

Search

There are several ways to perform a search in Tellus Web. The most common is to use the quick search, but you can also use the advanced search or the click and search function.

1. The quick search is available from every page in Tellus Web. The search will be made on Name/Number, which means that the system looks at the first characters written in the text box. If it is a number, the system searches for extensions, if it is a letter, the system searches by first name. If the first character entered is a space and the second is a letter, the system will search for a user with a last name that matches the search criteria.

2. You can access advanced search by choosing "Search" in the menu. A drop down menu provides options for various search criteria, e.g. company, keywords, title etc. You can also choose name or number; these can be used to search for names that begin with a number or a number that begins with a letter.

3. Use this link to go to the tree view and the "click and search".

Advanced search

The first thing you have to do when you are going to perform a search is to choose the search criteria. You do that by picking one in the drop list. The search criteria that are default is name/number and you can choose from the following:

Name[4]

Number

Name/Number[5]

Company

Organisation

Cellphone

Title

Keywords

User groups

State

Street

Username

First name

Last name

Location

E-mail

Sip Adress

Birthday

If you want to search for all users you can press space, * or % to do a wildcard search. You can also set a % before or after the search string for a wildcard search.

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[4] This search is on first names. The search criteria will change to last names if the first character is a space. It takes 3 characters to search on phonetics.

[5] This is the standard criteria and the search will be made as the following: If the first character is a letter, the search will be made on first names. If the first character is a space, the search will be made on last names. If the first character is a number, the search will be made on extensions.
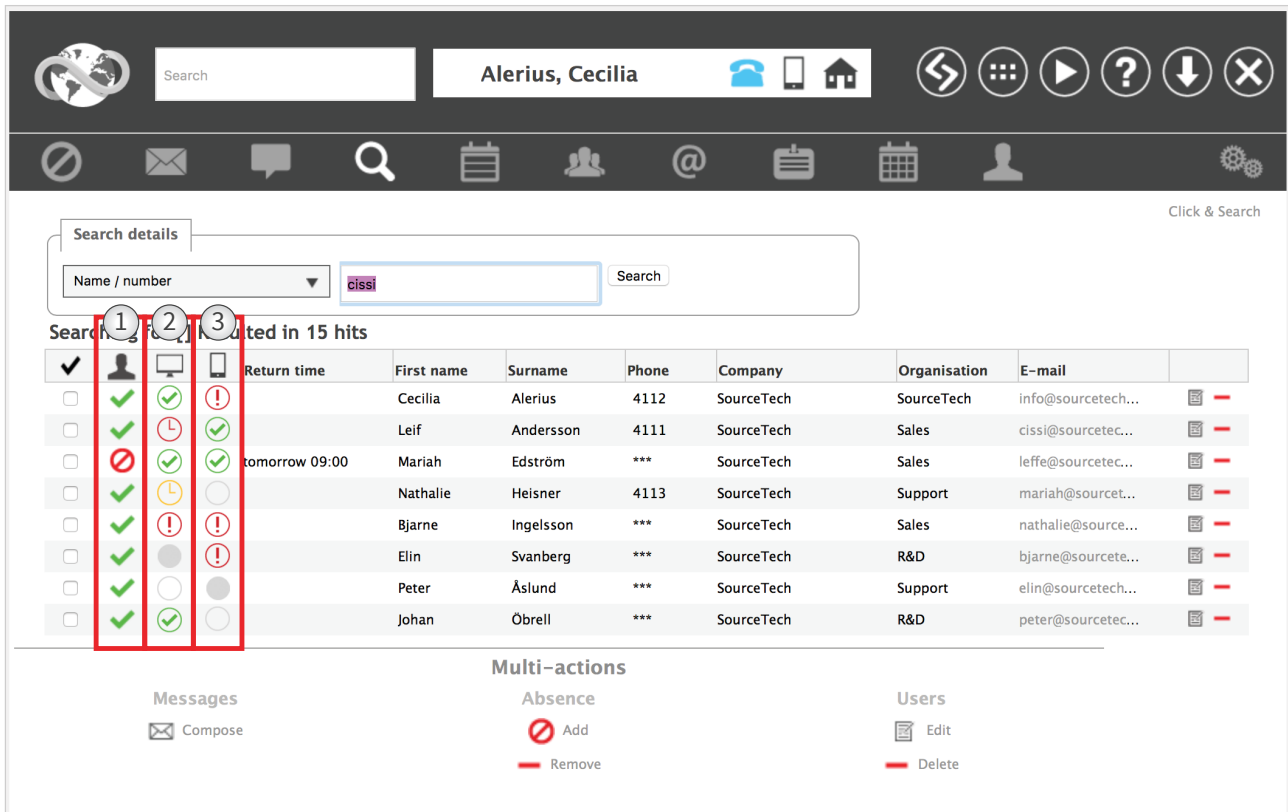
Click and Search

You can search by clicking around in the organisation tree with the "Click & Search" function. You can also search for titles, keywords, user groups, locations, and birthdays.

Search results

Here you can see the search result from my search on name/number on the string with a space.

To the left you will see four columns. The first column gives you the possibility to choose multiple users. Tick the boxes of the users that you want to mark, and use the black check mark at the top of the column to invert your choice.

1. Here you can see the users status in Tellus, a red icon means that the user has an active absence and if there is a green icon the user is present. If the icon is a yellow arrow the user has an active forwarding on their extension. If you hover on the icon you will get further information about the status.

2. This column represents the users data presence; in this case the data is received from Lync. If you hover on the icon you will get further information about the status.

3. This column represents the users tele presence; in this case the data is received from TDC mobil, Ventelo or Telenor Bedriftsnet. If you hover on the icon you will get further information about the status.

Data- and tele presence demands special licenses in Tellus.

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Detailed view

If you click on a user in the search result list you will be redirected to the details for the chosen user.

This view will allow you to see all information available about the specific user.

At the top you will see the active status and the users name. You also see information about the active status in the field with red boarder. (With the correct role you can remove the active status from the user).

You will find all contact information below the status. The internal numbers have the extension part underlined. If a number is private it will be marked with 4 stars as the example above. All information is clickable and will redirect you to the chosen information. For example; If you click on the replacers name, you will be redirected to that users information.

Under the users name is the most recent micro blog update. If you want to follow/unfollow the users micro blog you simply click on the plus/minus icon inside the update.

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Schedule

A schedule shows working hours and automatic absence messages.

Tellus has two types of schedule - system schedule and personal schedule. Only administrators can change a system schedule. A personal schedule can be created based on a system schedule, but then only the user can administrate it. A schedule can define working hours and one or more absence message types.

At least one schedule must be associated, but of course it is possible to belong to a schedule that only contains working hours so that the user only uses the absence management to control the presence status on their extension.

1. Here you can change the timezone.
2. Use the arrows to change week, click ont he calendar icon to go to a specific date and click on today to see the current day/week.
3. When you first click on the schedule menu item you will see your own week and all absences that you have planned. If you click in the schedule (on the white part) you will be redirected to edit mode.
4. Here you see color explanation of the schedule.
5. Click on this link to edit the schedule.

Edit schedule

Start by pressing the schedule you want to edit. You will after that be redirected to the schedule manager (as seen above).

1. Here you can see between which hours that this schedule will be active and on which days. Click on the green plus icon to add working hours.
2. Here you see the name of the schedule.
3. Click on this icon to add a week, you can create a rotating schedule with up to 99 weeks.
4. Click on this icon to add an absence type. You do this so you can add an automatic absence in your schedule. You can add several types.
5. Click on this icon to remove an automatic absence. You will get a new dialog where you can choose which absence you want to remove.
6. Click on this icon to add an automatic absence of the chosen absence type.
7. Change the information to edit the automatic absence. Use the red minus icon to remove the absence and the green icon to save.

Automatic absence
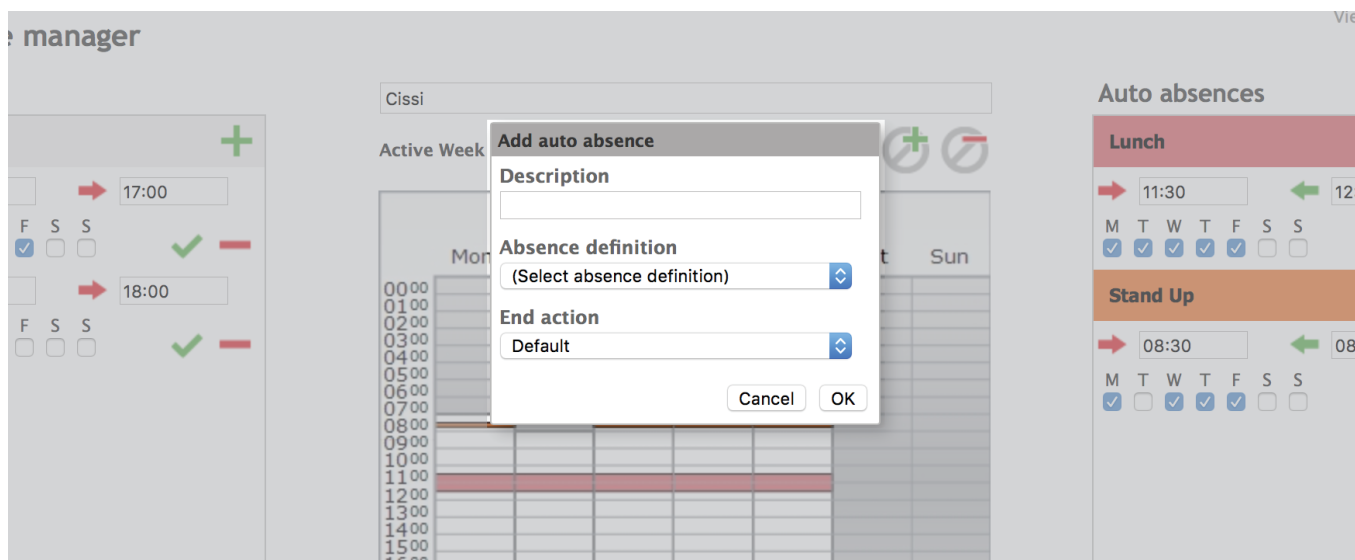
Start by pressing the icon to add absence type (see image on page 21).

1. Enter a description of the absence. This text will only be displayed in this view.
2. Choose an absence definition in the drop list. This is used for the color scheme in the schedule and if the system has spoken absence.
3. Choose what end action the absence should have. (E.g. If the phone should open)

User groups

Groups can be created for various purposes. Group members can belong to different organisations, so you can create a project group where you can easily reach the people participating in a certain project. A group can be public or private, if the group is public everyone in the system can see it, but if it's private it will only be visible for the members.

1. If you are a member of several groups you can choose which group you want to see by using the tabs.
2. Here you will see a list of all users that are members of the group. You can see status, organisation and the users extension.
3. Use these buttons to send messages or to set an absence message on a user. You can also remove users from the group by using the minus icon.
4. Use these links to handle the group.
5. Use these options when you have several users selected.

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Contacts

Tellus there is a function for external contacts. This means that you can have all the company contacts in one place.

Search for a contact by entering the name in the search field and click "Search". You can also use the buttons that represent a letter and do a search in that way. If you want to add a new contact, just press "Add".

Add contact

Enter the information about the new contact.

Remember that everyone at the company will be able to see these contacts.

Visit

You don't have any upcoming visits, Add a Visit
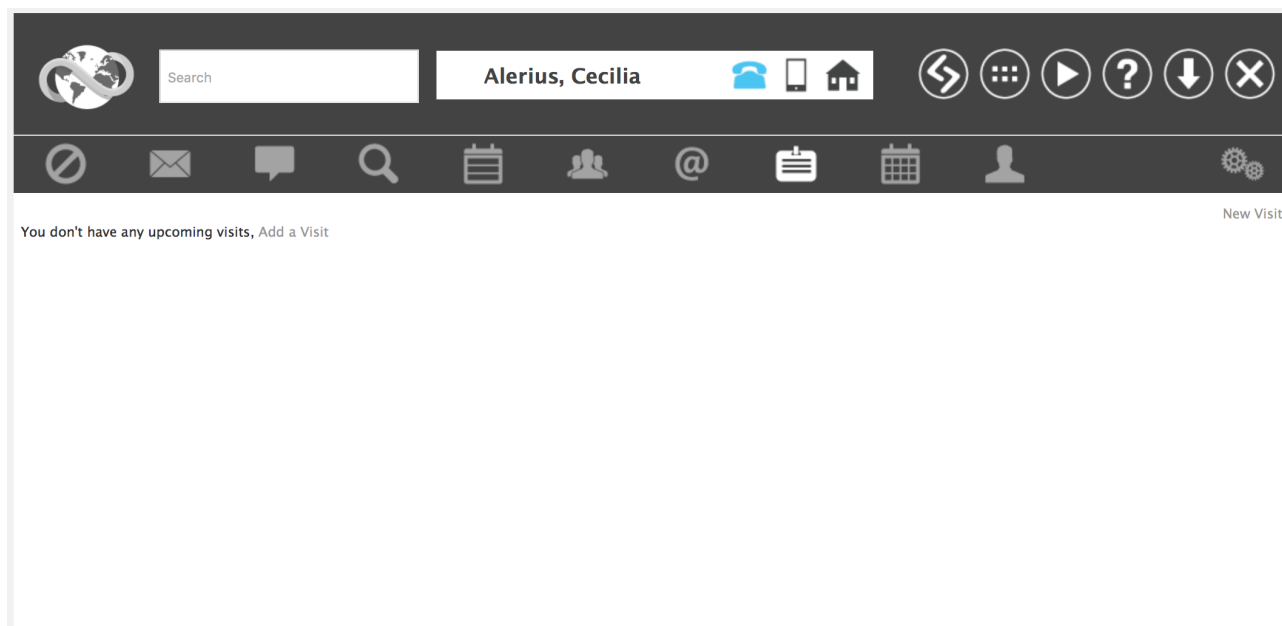
New Visit

Tellus has an integrated visit system. This means that you can register your visitors in advance. This way the receptionists will have an easier workflow and your visit will be registered in the system.

To add a new visit, just click on the link "New Visit" in the right corner.

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Register visitor

In this dialog you can fill in the information about the visit. Enter time and date for when you expect the visitors arrive and when you expect them to depart.

If you tick the box "Notify me" you will get an SMS or email when your visitor has arrived. (This requires a license for SMS)

Press the green plus sign to add visitors to this visit. Enter the information about the visitor, first name and last name are mandatory. Press "Create visitor" when you are done. If you want to search for visitors that already is in the system, click the magnifying glass.

Booking

You can book conference rooms, projectors and other company resources through the booking in Tellus Web.

1. Here you can see the name of the object you have chosen.

2. These icons represents the equipment that is located in the room. In this room there is seating for 300 persons, a projector, conference phone and a white board. The administrator sets these settings in the administration.

3. Use the search field to search for a specific booking.

4. All bookable resources are listed in the tree view. Next to the room name is a number in a parentheses, this is the capacity of the object. This means that the room "Stockholm" has the capacity of 300 people, and under the area "Sweden" there are 8 objects (in this case rooms). If you click on the object, you will get a day view over those objects that are in that area.

5. Press this icon to create a new booking. You can also click in the calendar at the time and date that you want to make the booking.

6. Press this icon to open the resource booking in full screen.

7. Press this icon to change the date displayed to "today".

8. Press this icon to open a calendar where you can choose a date or a week that you want the object to be displayed in.

9. Click on this icon to show the object in a monthly view.

10. Click on this icon to show the object in a week view.

11. Click on this icon to show the object in a day view.

Add booking

When you create a new booking, enter the information in the form above and choose which object you want to book.

My Settings

The final tab for standard users is the tab for your own settings. Here the user can change various information.

Note that the ability to make changes here are depending on what rights you have in the system and it can therefore differ from the pictures in this manual.

Account information

The first part of the settings is login and account information.

- Change your login name (Note that this must be unique. Don't change this without consulting your administrator)

- E-mail address is used for messages that are sent from the operator, other users, the visit system or the voice mail. This is also used for the function "Forgot Password".

- The "Remember Me" is used so you do not have to type in your login name and password each time you log into Tellus.

- To change password, enter the new password here and repeat it.

Personal information

The next part of the settings are the personal information. The following settings can be changed here:

- First name (Don't change this without consulting your administrator).
- Last name (Don't change this without consulting your administrator).
- You can enter your birthdate here, this will make your colleagues aware of your birthday. This information is optional.
- Choose your title in the list. Contact your administrator if your title is missing from the list. This information is optional.
- You can choose a pre defined location in the list. This can make it easier for colleagues to know where you are located. This information is optional.
- Here you can enter information that is personal. It may include information about allergies, telephone numbers of family members or the like. Only users with a specific right to see this information. This information is optional.

Globalization

In this part you can enter information on your preferred language in the system and your timezone.

Fonetics

Use the fonetic to enter alternative spellings. This will make it easier for colleagues and operators to find you is you hav a nickname or a name that can be spelled in several ways.

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Användarbild

To upload a image you start by pressing the button for "Choose file" and locate the image you want on your computer. If you want to remove the image you can use the link at the bottom of the image.

This image will be used in TellusWeb, Tellus Mobile, the operator application and the visit terminal.

Message settings

You can choose how you want to receive your messages that are sent from Tellus. Tick the boxes to choose the ways you want to receive the messages.

Calendar

These settings are only used if your company uses a calendar integration with Lotus Notes.

Tellus Voice

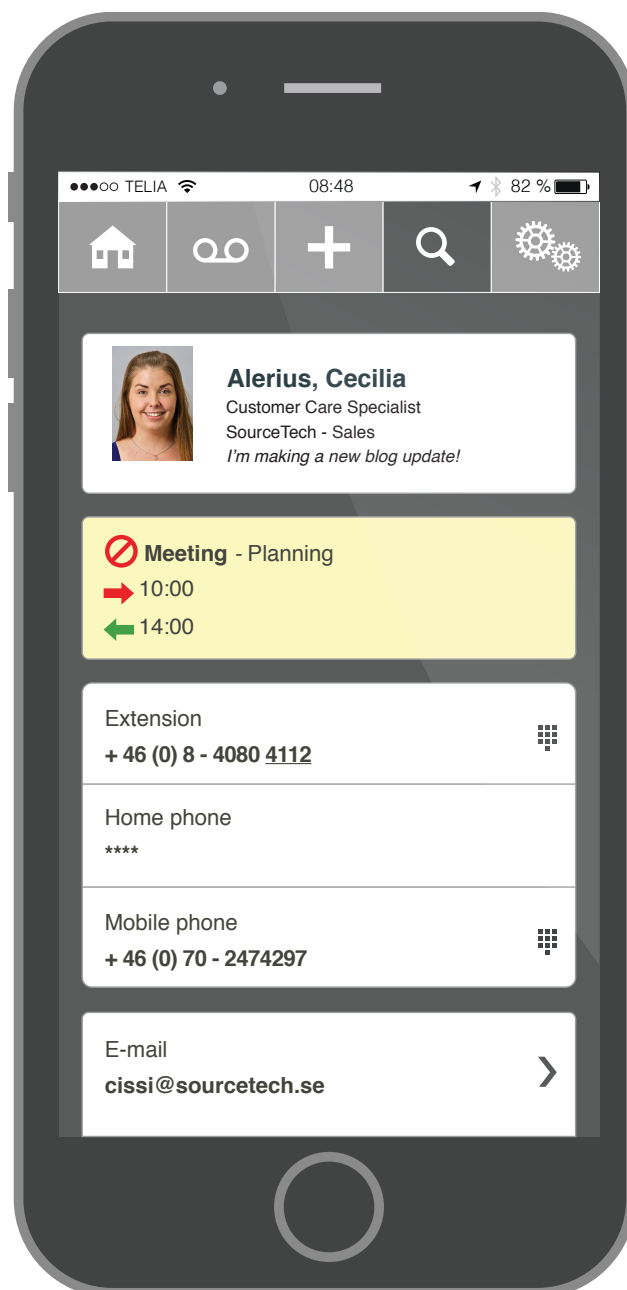| Tellus Voice	
Enabled	☑
Locked	☐
PIN	••••
Auto login	☑
Message lamp	☑
Enable inbox	☐
Language	svenska (Sverige) ⇕
Use name playback	☑

The settings you can change for your voice mail are available here.

- Enabled - This box needs to be ticked if you want to use the voice mail with spoken absence.

- Locked - This box is ticked if you have made to many failed log in attempts.

- Enter the pin code you want to use here.

- Tick this box if you want to be automatically logged in when you call to listen on the voice mails.

- Tick this box if you want to have the message lamp on your office phone to blink when you have a new message.

- Tick this box if you want to have an inbox.

- Choose the language you want to have on the prompts when you call the voice mail.

- Tick the box if you want the spoken absence to say your name instead of your extension number. (This requires a specific license and that your name has been recorded. Contact your administrator if you have any questions.)

Tellus Mobile

Tellus Mobile is a website developed for smart phones. You can use it to search for your colleagues when you are not in the office, create absences etc. With Tellus mobile you will have your whole company directly in your phone.

Tellus Mobile supports the leading operating systems for mobiles, Android, iOS and Windows Phone 7.5.

●●●○○ TELIA 🤶   08:48   ⌕ ⚹ 82 % ▮

Alerius, Cecilia
Customer Care Specialist
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I'm making a new blog update!

🚫 **Meeting** - Planning
➡️ 10:00
⬅️ 14:00

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MyTellus

MyTellus is an application available to all Tellus users. You download MyTellus via the small download icon in the top right corner of the web client. MyTellus is a "tray application" that displays current status as an icon to the left of the clock. The icon is green if you are available and red when an absence message is in place. You can right-click on the icon to bring up a menu where you can easily access absence messages, messages, visits and change active profile. Each time the program starts MyTellus checks to see if there is a new version of the application on the Tellus server and then automatically updates the software.

MyTellus (Cecilia Alerius)

Designing sourcetech.se ▶

✔ **Present - 12:00**
➡ **12:00 - Lunch**
⬅ **13:00 - Present**

Favorite absences

Busy ▶

Demo ▶

Duty Travel ▶

Forwarded ▶

Lunch ▶

Meeting ▶

Out Of Office ▶

Sick ▶

Other absences ▶

6306 ▶

No visits today

Send message

Settings

Log out...

Exit