



EPOS

ADMIN GUIDE

# EPOS Manager





# Content

<b>1. Introduction</b>	<b>4</b>	<b>5. Manage device</b>	<b>19</b>
1.1 Product overview	4	5.1 All devices	19
1.2 Attributes of EPOS Manager	4	5.2 Devices in use	20
1.3 Scope of the document	4	5.3 Inactive devices	20
1.4 Intended audience of this document	4	5.4 Removed Devices	21
1.5 EPOS Manager Workflow	4	5.5 On Stock	22
<b>2. Getting started</b>	<b>5</b>	<b>6. Manage updates</b>	<b>23</b>
2.1 Registration	5	6.1 Pending updates	24
2.1.1 Signing up	5	6.2 Software updates	24
2.1.2 Logging in	5	6.3 Firmware updates	25
2.1.3 Forgot password	6	6.4 Rejected updates	25
2.2 Deployment of the EPOS Connect	6	6.5 Deployment status	26
2.2.1 Retrieving client files for the first time	6	6.6 Deployment details	27
2.2.2 Installing the client manually for the first time	7		
2.2.3 Firewall Setup	8	<b>7. Configuration</b>	<b>28</b>
2.3 EPOS Manager Layout	8	7.1 Configuration overview	28
2.3.1 Login information	8	7.2 Pending Configurations	28
2.3.1.1 Settings (General & Data privacy)	8	7.3 Rejected Configurations	29
2.3.1.2 Administration	9	7.4 Device Configurations	29
2.3.1.2.1 View Admins	9	7.4.1 Duplicate configuration package	29
2.3.1.2.2 Add/Edit Admin	10	7.4.2 Edit configuration package	29
2.3.1.2.3 Client config	10	7.4.3 Deploying Configuration	29
2.3.1.3 Change password	10	7.4.4 Deployment Status	29
2.3.1.4 Help	10	7.5 Software configuration	30
2.3.1.5 About	11		
2.3.1.6 Logout	11	<b>8. Reports</b>	<b>31</b>
2.3.2 Grid settings	11	8.1 User	31
2.3.2.1 Row count	11	8.1.1 User Overview	31
2.3.2.2 Display selections	11	8.1.2 Client versions	31
2.3.2.3 Column display order	11	8.1.3 Monthly Overview	31
2.3.3 Search	12	8.2 Device	31
2.3.4 Information fields	12	8.2.1 Device Overview	32
2.3.5 Page navigation	12	8.2.2 Other devices	32
2.3.6 Application menu	12	8.2.3 Device adoption	32
		8.2.4 Headsets per User	32
<b>3. Dashboard</b>	<b>13</b>	8.2.5 Update Overview	32
3.1 Active device	13	8.3 Call Activity	32
3.2 Firmware version	13	8.3.1 Call Overview	33
3.3 Software version	13	8.3.2 Call Duration – Device	33
3.4 Call activity	13	8.3.3 Call Duration – Softphone	34
3.5 Your assets	13	8.4 Softphone	34
3.5.1 Devices	14	8.4.1 Softphone Adoption	35
3.5.2 Softphones	14		
3.6 New updates and new configurations	14		
3.7 Deployments	14		
<b>4. Manage user</b>	<b>15</b>		
4.1 Users	15		
4.2 Manual group	16		
4.3 Inactive users	17		
4.4 AD group	17		
4.5 Deleted users	18		

# 1. Introduction

## 1.1 Product overview

EPOS Manager is a cloud-based multi-tenant server application used for managing and supporting EPOS devices in Enterprise environments.

Companies signing up for a tenant (company) account will gain access to an easy to manage system, from where enrolled EPOS Connect clients (End-users) in the organization can be managed.

A company IT administrator can easily track EPOS devices in the environment from any PC, push configurations and quickly deploy software and firmware updates to a vast number of users.

### **EPOS Manager:**

Administering devices, end-users and associated PC client application.

### **EPOS Connect:**

End-user PC client, providing local update service for connected devices.

## 1.2 Attributes of EPOS Manager

EPOS Manager enables a tenant administrator in an organization to:

- Manage assets by providing full status overview
- Locate devices and fetch device details from anywhere.
- Identify devices in the organization having an outdated version of firmware
- Accomplish uniform attributes throughout the environment by deploying firmware/software updates
- Read and set settings on EPOS devices from anywhere.
- Identify underutilized devices to fully use the inventory, hence optimizing the benefit of the device investment.

## 1.3 Scope of the document

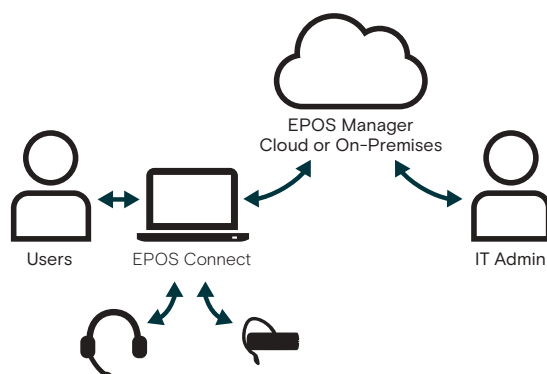
This document contains an overview of EPOS Manager features and how to perform tenant administrative tasks using the EPOS Manager.

## 1.4 Intended audience of this document

This document is intended for the selected Tenant Administrator. The tenant administrator will be able to manage deployed devices from EPOS.

## 1.5 EPOS Manager Workflow

The following diagram shows the basic workflow of the EPOS Manager (used by Tenant Administrator) and EPOS Connect (used by end-users) applications.





## 2. Getting started

### 2.1 Registration

If you have not yet applied for access to the EPOS Manager, this is done using the form available on the EPOS webpage.

**[www.eposaudio.com/eposmanager](http://www.eposaudio.com/eposmanager)**

Fill in the form and submit it. The submission will be sent to the support team.

Please expect a response within a couple of business days. A member of our support team will reach out to you to ensure a smooth start up with EPOS Manager

#### 2.1.1 Signing up

To sign up, following company information is required:

- Company name
- Tenant name
- Admin first name
- Admin surname
- Admin contact number
- Admin email address
- Number of users
- Country
- Solution

Please read the license terms and conditions carefully. Select the “I agree” option next to the terms and conditions to be able to sign up.

After submission, an email will be sent on behalf of EPOS to the Admin email address, with a password reset URL, website URL.

#### 2.1.2 Logging in

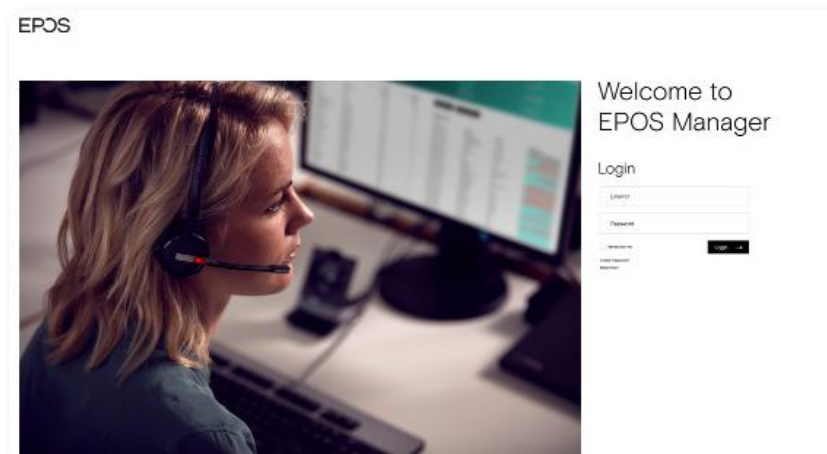
Post registration, you can log in by using your email address as the username and the desired password. For connecting to EPOS Manager, following browsers are recommended:

- Google Chrome
- Internet Explorer (IE) 10
- Internet Explorer (IE) 11
- Mozilla Firefox.

For connecting to EPOS Manager from a Mac OS, Safari browser is recommended.

Log into EPOS Manager at:

**<https://enterprise.eposaudio.com>**



### 2.1.3 Forgot password

In case the login password has been forgotten, click “Forgot Password?” Type in the registered email address and select Submit. A response email with a URL link will be sent to the registered email address. You can reset the password by following the URL provided in the response email sent.

## 2.2 Deployment of the EPOS Connect

The end-user application “EPOS Connect” must be installed on end-user PCs required to be managed via the EPOS Manager.

A suitable system management software like (SCCM) is recommended for deploying the PC client software.

Files that need to be deployed to end-user PCs are:

- EPOS Connect installer  
(Available from the menu “Manage Updates”)
- TenantConfiguration.dat file
- (This file is automatically downloaded as part of zip file but is manually available from the tenant admin menu\ClientConfig)

### 2.2.1 Retrieving client files for the first time.

Navigate to Manage Updates layout using “Manage Updates” menu. Go to the tab “Pending Updates”.

The list presented contains all the latest firmware and software released from EPOS. Look for EPOS Connect. If you cannot see it in the list, use the Search option by typing EPOS Connect.

Approve receiving this software.

The line will then disappear and reappear under the section called Software Updates.

This and the Firmware Updates section will be your working areas going forward.

Click the Software Updates TAB.

In this view, you have the possibility of downloading the latest EPOS Connect client to your local machine by clicking the download icon.

Once clicked, the download starts automatically or prompts you for options (depending on your browser settings). (Often to the Download folder)

Once downloaded, please create a folder where you unpack the downloaded file.

After unpacking the file, folder should now contain the following files: (version number can vary).

1. EPOSConnect\_4.0.0.9.exe
2. product details.txt
3. TenantConfiguration.dat
4. WebToolAgent.xml
5. WebToolAgentReleaseNote.txt

### 2.2.2 Installing the client manually for the first time

From the installation folder where you placed the installation files and the TenantConfiguration.dat file, run the exe file. (Administration rights to the PC are required.)

#### Follow the guide and complete installation.

Start the application by clicking the EPOS Connect shortcut on the desktop – or find it by typing EPOS Connect in the search program under the Windows menu.

Please leave time for the product to initialize and negotiate with the cloud service. Usually it takes a few minutes, but in a few cases it can take up to 5 minutes.

Log in to your web portal and click on the Manage User menu item. Your user automatically gets added to the system after the negotiation has taken place.

#### Updating already installed clients:

When an update to EPOS Connect is released from EPOS, the application will be available in “Pending Updates.” (In tab: “Manage Update” menu in EPOS Manager)

After accepting the update, you can deploy the update from “Software Update” under the “Manage Update” menu. Deploying an update of the EPOS Connect PC client:

PC client:

When deploying an update to end-users via EPOS Manager, the end-users must have administrator rights for being able to update their installation. If end-users do not have administrator rights on their PC, the EPOS Connect application must be deployed to end-users using a suitable system management deployment tool.

#### Mass Deployment

The ability to distribute software to a number of users or computers from a centralized location has become a requirement for many administrators. The software is installed without the administrator physically visiting each machine. An administrator can use system management software to control a user's environment.

EPOS Connect installation support silent installation and uninstall.

The command line arguments used for the silent installation of the EPOS Connect.

Application is: EPOSConnect.exe /S /v/qn For silent uninstalling EPOS Connect Application, the command line arguments are: EPOSConnect.exe -silent -uninstall

Note: The silent installation does not trigger the application to start, so a restart of the PC is required to start up application. If an administrator wishes to start the application after silent installation he should launch the below exe after installation.

32 bit OS: C:\Program Files\EPOS\EPOS Connect\ECLaunch.exe

64 bit OS: C:\Program Files (x86)\EPOS\EPOS Connect\ECLaunch.exe

#### Product Code

The Product details.txt files contain the Product Code. This is used for detection validation.

### 2.2.3 Firewall Setup

Open firewall port 443 over tcp outbound for the below endpoints:

For accessing application URL's:

<https://enterprise.eposaudio.com>

<https://api.enterprise.eposaudio.com>

For accessing static content

(device image, description, software and firmware):

<https://webapptoolstoreprod.blob.core.windows.net/>

For Logging:

<https://webtoolagentlog.table.core.windows.net/>

## 2.3 EPOS Manager Layout

The layout of EPOS Manager is divided into sections as described below.

### 2.3.1 Login information

The login information will give the administrator access to settings, download the account unique "TenantConfiguration.dat" file, change credentials and terminate the current session.

In the dropdown menu, select the option that corresponds to the required function to be performed.

#### 2.3.1.1 Settings

System settings are displayed here.

General settings:

- "Time Zone Preference" – can be set according to relevant location.
- "Updates End Point address" – Server address to updates. Not configurable

Client settings:

- |                    |   |                  |
|--------------------|---|------------------|
| – "Back End Point" | Server address.   | Not configurable |
| – "Tenant ID"      | Tenant specific system ID.                                      | Not configurable |
| – "Heart Beat"     | Interval in Sec. for client polling<br>EPOS Manager for updates | Not configurable |

- Update mode Configurable  
 Enable option for Update from File on clients.  
 This is by default disabled so end-user will not have  
 the option to select upgrade from file.

Note: Not applicable for EPOS Connect for thin clients as Update from File is not supported

- Allow Downgrade Configurable  
 Enable option for Allow Downgrade of the firmware.  
 This is by default disabled as EPOS always  
 recommend to run on the latest firmware version.

Please note that changes made in settings will be applicable for all users



### Advanced data privacy configurations

- Collect Personal Data (Configurable)  
Collect Personal Data is selected by default as EPOS always recommend to collect user records. Deselecting this option can cause hard delete of all the users related to that tenant.

Note: Not applicable for EPOS Connect for thin clients as no Personal Data is collected

- Anonymize with AD  
If IT admin switches to anonymize with AD then admin can use AD groups to push the update and EPOS Connect will not send the user information to the EPOS Manager.
- Anonymize without AD  
If IT admin switches to anonymize without AD then admin cannot able to push the updates to AD group. EPOS Connect should never talk to AD and send the data back to the server. Also, in 'Manage User' section 'AD Group' tab will be hidden.

### Collect Reports

- Call Statistics (Configurable)  
By default call statistics settings is set to collect and agent should consider the setting of call statistics for sending data. If the IT admin unchecks this option, delete all the table data related to the call activity and stop generating the Call Activity Reports for that tenant. Also, 'Call Activity' related data shown in 'Dashboard' section will be displaying lock-icon.
- Softphone Statistics  
By default softphone statistics settings is set to collect and agent should send the softphone list to the server after receiving the changes in the heartbeat. If the IT admin unchecks this option, delete all softphone related information from the database and stop generating the Softphone Reports for that tenant. Also, 'Softphone' statistics table will be hidden from 'Dashboard' section.

Note: Not applicable for EPOS Connect for thin clients as reports feature is not supported

### 2.3.1.2 Administration

EPOS Manager enables the possibility to create more admin users with different roles and privileges to manage this application.

Note: Only the administrator created on signup can create more admin users.

#### 2.3.1.2.1 View Admins

The tab 'View Admins' is in the main view of the 'Manage Admin' layout, showing all the admins information.

The following details can be found in the view:

- Admin Name
- Role
- Email ID
- Contact
- Country
- Region
- Created On
- Created By

You can edit or permanently delete a specific admin from the database using the icon buttons available in the grid 'Action' column.

To create a new admin, click 'Add Admin' button available in the 'Manage Admin' layout and fill in the required information.

#### 2.3.1.2.2 Add/Edit Admin

To create new admin or update admin, following information is required:

- Admin First Name
- Admin Last Name
- Admin Email ID
- Admin Contact Number
- Region
- Country
- Time Zone
- Role

After filling in all the required details, click on 'Add' button to submit the details. Once details submitted successfully, E-mail(s) sent to newly created user to reset password.

Three different roles are supported:

- Power User  
(Provides full permissions for all the features except no access to 'Administration' feature)
- Internal User  
(Provides read-only permission for all the features except no access to 'Administration' feature)
- Tenant Admin  
(Logged-In Tenant details will be displayed in View-Admin grid and Edit/Delete action will be hidden for the same)

#### 2.3.1.2.3 Client config

A Tenant account specific Token (TenantConfiguration.dat) can be downloaded here, for deploying to end-user installations.

- The token must be deployed to end-user PCs when installing the EPOS Connect client.
- The token ensures that the clients are allowed to connect the tenant-specific account on the EPOS Manager system.
- The token is required for clients to be managed and to receive updates from the IT administrator.

The token (TenantConfiguration.dat) contains Tenant account specific information, ensuring a secure connection between the end-user application and the tenant-specific account. Once downloaded, the TenantConfiguration.dat file is encrypted and cannot be read.

- Backend Endpoint (address of the server with which the EPOS Connect will communicate)
- Initial Heartbeat Time (The value set in "Heart Beat" indicates the duration in seconds for when the EPOS Connect will contact the server and check for available FW and SW updates).
- Tenant specific ID

#### 2.3.1.3 Change password

The administrator can change the account password at any time. Go to the tenant drop-down menu and select "Change Password"

#### 2.3.1.4 Help

Documentation and user guides for the system can be accessed by selecting "Help."

### 2.3.1.5 About

Select “About” to learn about system information.

The following system info will be shown:

- Version
- Build
- Date of the application.

### 2.3.1.6 Logout

To secure account details and eliminate misuse of the system, select Logout after finishing tasks in the system.

## 2.3.2 Grid settings

In Grid Settings, the listed column view can be arranged.

A user can customize the field columns by changing the following settings:

- Column properties
- Display selections
- Column display order

The changes made in the grid will be valid only for that specific machine and specific browser until that specific browser’s application data is cleared.

### 2.3.2.1 Row count

“Number of rows” per page to be viewed can be set by clicking the drop-down button.

### 2.3.2.2 Display selections

Including, excluding and order of displayed fields can be set in the grid settings view.

Add to the Selected Column from the Available Column.

Remove from the Selected Column to the Available Column.

Add all fields to the Selected Column from the Available Column.

Remove all fields from the Selected Column to the Available Column.

### 2.3.2.3 Column display order

The column display order in the Selected Columns box determines the display order in the final view. Top to bottom order in the list box makes the change in reference of left to right order in the display. Once the column selection is highlighted in the Selected Columns, the column display order can be changed using the following functions.

Move the selected column up in the list box  
(left in the final display).

Moves the selected column down in the list box  
(right in the final display).

To get the default settings, click “Restore Default Settings.”

### **2.3.3 Search**

Use the Search bar to quickly search for a specific attribute in the current view.

### **2.3.4 Information fields**

The information field shows the result of the chosen main menu and associated tabs. The listed order can be sorted alphabetically and numerically in ascending or descending order.

To change the order of sorting, click on the field name to change the displayed order.

### **2.3.5 Page navigation**

Navigating multiple pages in EPOS Manager is easily accessed at the bottom of the displayed view.

### **2.3.6 Application menu**

The main menu contains associated selectable tabs, which will display subject specific information:

- Dashboard
- Manage Device
- Manage Updates
- Manage User
- Configuration
- Reports

The selected menu will always be highlighted

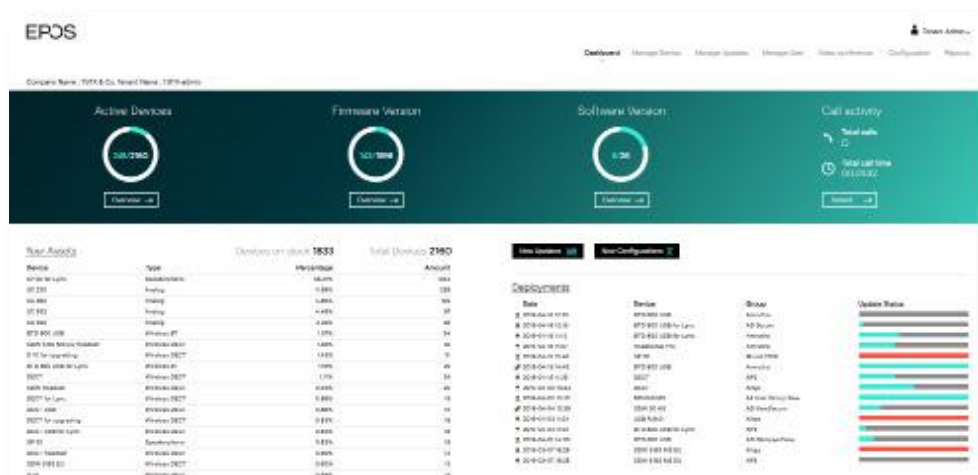


## 3. Dashboard

Dashboard gives the overall analysis of active devices, version updates, call Activity, Assets, and Deployments etc.

The dashboard contains the following categories:

- Active Device
- Firmware Version
- Software Version
- Call Activity
- Your Assets
- New Updates and Configuration
- Deployments



### 3.1 Active Device

This chart gives the information about the total count of active devices to the total number of devices. On click of Overview button, the site will navigate to the 'Device' tab of 'Reports', selecting 'Device Overview' from sub-category.

### 3.2 Firmware Version

This chart gives the information about the total count of firmware versions up to date to the total number of firmware versions available. On click of Overview button, the site will navigate to the 'Device' tab of 'Reports', selecting 'Update Overview' from sub-category.

### 3.3 Software Version

This chart gives the information about the total count of software versions up to date to the total number of software versions available. On click of Overview button, the site will navigate to the 'User' tab of 'Reports', selecting 'Client Versions' from sub-category.

### 3.4 Call Activity

Call Activity gives the total number of calls and Total call time. On click of Details button, the site will navigate to the 'Call Activity' tab of Reports, selecting 'Call Overview' from sub-category.

### 3.5 Your Assets

Total Devices: This shows the total number of devices. On click of 'Total Devices' count, user is redirected to "All Devices" tab of "Manage Device" section.

Devices on stock: This shows the total number of devices which are on stock. On click of 'Devices on Stock' count, user is redirected to "On Stock" tab of "Manage Device" section.

### 3.5.1 Devices

This section contains the summary of Devices in a tabular view with the following columns.

- Device
- Type
- Percentage
- Quantity

### 3.5.2 Softphones

This section contains the summary of Softphones in a tabular view with the following columns.

- Softphone
- Type
- Percentage
- Quantity

The total number of users, Users without devices, Total Admins count is shown at the bottom of the table. On Click of 'Total Users' count and 'Users without Device', user is redirected to "Users" tab of "Manage User". And on click of 'Total Admins', user is redirected to 'View Admins' tab of 'Manage Admin'.

## 3.6 New Updates and New Configuration

This section gives the count of New Updates and New Configurations where on click of the icons will redirect to Pending Updates tab of Manage Updates section and Pending configurations tab of Configurations section respectively

### 3.7 Deployments

This section gives the deployment status of the updates and configurations. The following details are present in tabular view.

- Type: Download icon indicates update and settings icon indicates configuration
- Date
- Device
- Group
- Update Status

## 4. Manage user

Manage user menu is for managing users having the client application EPOS Connect installed on their local PC.

The user are automatically created in the system the first time the EPOS Connect is started on the end-user PC.

### 4.1 Users

For the user to be created in the system the information FirstName, LastName and Email address needs to be available. This will happen automatically by the client querying the AD. If these information are not available or empty the user will be created using the PC login name as firstname, domain name as lastname and email address as a combination of login name and domain name.

Information such as Office, Country and City will also be queried. If no information is available the user information will stay blank.

The Administrator can manually add this information on the user if desired by clicking the edit icon on every user.

User have an option to export the data by clicking on the excel icon on the top right corner

The users screen view will have the following details

- User  
(User information is the combination of First Name and Last Name)
- E-mail
- Client Version
- No of Device(s)  
(Will have the number of devices associated with the user)
- Last seen
- Action  
(Have options to edit or delete the user)

For much more information, Tenant or IT Admin can click on user name link to view Detail(s), Device(s) & Machine(s).

The Details tab view contains the following details

- First Name
- Last Name
- E-mail
- Client Version
- Last seen
- Country
- Office
- City

The Devices tab view contains the following details

- Device Name
- FW Version
- Registered User
- Current User  
(Gives info if the current user using that device)
- Last Seen

The Machines tab view contains the following details

- Machine Name
- Operating System
- OS Version
- Model
- System Type
- Client Version

On expanding the 'Machine Name', details of the softphone installed in that machine will be displayed.

## 4.2 Manual group

When deploying a FW or SW update, this must be done to a group.

(In case just one user is to receive an update, add the user to an empty group)

The Manual Group tab allows the tenant administrator to organize users into groups. In case a more detailed grouping of users is desired based on member criteria, sub-groups to an existing group can be created.

Example: A tenant administrator can choose to create groups for indicating departments, locations, floors, etc. having attached sub-groups containing members based on user/device profile.

For creating a new group or sub-group, click "Create New Group."

Select New Group from group type and fill in the group name and group description fields.

For a sub-group, select new sub-group from group type and fill in the following details:

- Parent group
- Sub-group name
- Description

Add relevant users to a group by selecting users enrolled into the system and transfer to the group member list.

To quickly identify a specific user in the system, use the search bar located above the users list to search for the user to be added to the group. To remove user(s) from a group, click the "x" icon in the action column inside the group member list. Once group information and users have been added, click "Save" to save the created group.

Select all users checkbox can be used if you want all users registered in the system to receive the updates, also users added in the future. Enabling this checkbox will overrule any other selecting you might have made and will disable the grids for manual selection.

In the manual group list, a "+" sign next to a group name indicates that the group contains sub-groups. Click the "+" sign to expand the structure to view the sub-groups connected. Clicking "-" next to an expanded group structure will collapse the group view.



You can edit or permanently delete a specific group. To edit the parameters for a group or sub-group, click the edit icon.

When a change to group parameters has been performed, click “Save” to apply changes.

#### 4.3 Inactive Users

It helps to manage the inactive users in the system for a certain span of time period and option provided to filter inactive users based on different time period.

Following are the different time periods:

- 1 Month
- 3 Months (Default)
- 6 Months
- 1 Year

Delete option is provided in the layout to delete the users.

#### 4.4 AD group

Adding users to EPOS Manager AD Group Active Directory (AD) provides options to create groups and is used by EPOS Connect to determine if the end-user belongs to the group or not and also to handle large number of users. The data in the Active Directory is stored in a hierarchical and extensible form. The AD group tab enables the tenant to create, view and edit an AD group.

The following details can be viewed:

- AD group name
- Creator
- Date and time

You can edit or permanently delete a specific AD group from the database.

To create a new AD group, select the Create AD Group button. Fill in the AD group name (according the syntax AD\_\*) and AD search string. Click Add to create the new AD group.

Note: As an example, the below stated information is required to be filled in the “Create AD Group” window to create an AD Group under the name GroupIdentifier.

AD Group name: AD\_GroupIdentifier

AD search string: LDAP://LocalDomain/CN=GroupIdentifier,OU=Group,OU=Department,OU=Organization,OU=Operating region,DC=Root domain,DC=com

Where

CN = Common name

OU = Organizational unit Name

DC = Domain component.

To edit an AD Group, click the  edit button and make the desired changes for the AD Group name and AD search string.

Click “Save” to apply the changes.

Note: It is not possible to edit an AD Group if there are active deployments using the group. It is required to stop deployments, edit and then resend the deployment.

#### **4.5 Deleted users**

Users deleted from the “Manage User” list will be placed under the “Deleted User” tab. A tenant administrator can choose to either permanently delete a user from the system, or to restore the user.

If a user resides in the “Deleted users” list, the EPOS Connect client belonging to the user will no longer be able to receive updates.

If a user is permanently removed from the “Deleted Users” tab, all user specific information and historical data about usage is deleted.

User have an option to export the data by clicking on the excel icon on the top right corner

Select the “Restore User” button to move the user from the deleted users tab list to the Users tab list and the user will be able to receive updates again.

Select the “Delete User” button to permanently delete the user from the system.

## 5. Manage Device

The Manage Device menu is for managing the assets deployed in the organization. The devices can be registered manually. You can view the details such as firmware version and configuration settings by selecting an asset.

### 5.1 All Devices

The tab “All Devices” is the main view, showing all EPOS devices, as well as competitor products.

The following details can be found in the view:

- Device name
- Vendor  
(competitor devices will be recognized and displayed, but the update/detail info possibility is limited)
- Type of device
- Device ID
- Firmware version installed on the device  
(update symbol is shown when a new update is available)
- Current user
- Last seen
- Status
- If a device is registered (no symbol) or not registered (symbol).

For even more detailed information about a device, click on the device name and find the following information about the device.

- Device name
- Status of device
- Registered/Not registered
- Type
- Device ID
- Firmware version installed
- Update available (shown when a new update is available)
- Voice Prompt Version
- Voice Prompt Language
- Registered user
- First seen
- Last used date
- Last user
- Country
- Office
- City
- Description
- First Contact FW Version
- First Contact IP Address
- Last Contact IP Address

The second TAB in the details page shows list of configuration/settings applied to the device.

The third TAB in the details page shows which products are connected to each other with an easy way to navigate between the products by clicking the hyperlink of the product in the “connected to” list.

A device can be registered to a user, or have a registered user removed from device “ownership.”

To change the registration status, select the devices in the adjacent box of the same row and click the desired action button.

- “Registered device” – is when a user is set as a registered user (“owner”) of a device.
- “Unregistered device” – indicates that no specific owner has been assigned.
- “Current User” – shows the name of a user last seen using the device

A device can be removed (set inactive in EPOS Manager) by selecting the device in the “View Device” list. Click the “Remove Device” button. A pop-up information box appears, a remove device window appears and the following details will be displayed:

- Status of device           Active or inactive
- Device Name             Product Name
- Device ID                Product specific ID
- Vendor
- Reason                   Add comment about why the device is removed  
from active devices

Select “Remove” to remove the device from the View Device tab. The removed device can be viewed by clicking the tab “Removed Device.” Click cancel to close the window without removing any device.

## 5.2 Devices in use

The details of registered and unregistered devices are shown under devices in use tab.

“Registered device” – is when a user is set as a registered user (“owner”) of a device.

“Unregistered devices” are not tagged to a particular user. However, in the column “Current user”, the name of the latest user of the device can be seen, no matter if the device is registered or not. A device can be restored and then registered to a user by selecting it from the “Devices in use” list

The view includes the following details:

- Device Name
- Registered User
- Vendor
- Type
- Device Id
- FW Version
- Voice Prompt Version
- Current User
- Last Seen
- Status



### 5.3 Inactive Devices

It helps to manage the inactive devices in the system for a certain span of time period and an option is provided to filter inactive devices based on different time period.

Following are the different time periods:

- 1 Month
- 3 Months (Default)
- 6 Months
- 1 Year

Remove option is provided in the layout to soft delete the devices.

The view includes the following details:

- Device Name
- Registered User
- Vendor
- Type
- Device ID
- FW Version
- Voice Prompt version
- Current User
- Last Seen
- Status

### 5.4 Removed device

Devices taken out for maintenance, or discarded can be removed from the system by using the Removed Device tab. Once a device is removed from the View Device tab, the device is moved to the Removed Device tab. A removed device can be set active again by clicking “Put On Stock” action button. Details will then be updated when device is being used.

The view includes the following details:

- Device Name
- Device ID
- Firmware Version
- Current User
- Type of the device
- Last used time and date
- Reason for removal
- Voice prompt version

To perform any of the actions, select the checkbox for the device/devices being targeted for the same action.

- Select “Delete Device” to remove a device from the system.
- Select “Restore Device” to restore a device to the View device List.

### 5.5 On Stock

Under the TAB On stock devices that have no current user, not registered user are listed. If the administrator gets back a device, he/she can find the device in the overview by searching for user or device and click the Put to stock button to place the device in stock. All user information is cleared from the device. The device can be removed from stock by clicking the Register button to assign the device to a new user.

Note: If the system detects a device being connected, the device will be moved from On stock list to the Unregistered list. (See definition of an unregistered device above).

You can create a new device by Selecting “Create New” in on-stock tab. A “Create New Device” window appears and the following details have to be entered.

- Device ID
- Device Type
- Device Name

User has to input the 16 characters alphanumeric device ID, based on the device ID, system will identify the device family and device name and auto-fill the information.

The Device ID can be found on the box.

For adding analog devices the option analog must be selected. In this case the form is not auto fill and any ID's are allowed. Analog headsets are not detectable by the EPOS Connect and usage information is not going to be updated by the system.

IT Admin or Tenant Admin now have the ability to add multiple EPOS devices manually to EPOS Manager or by using Import devices option and uploading a csv file.

## 6. Manage Updates

In the “Manage Updates” menu, actions for approving applicable firmware and software received from EPOS is managed together with functions for deploying software and firmware updates to users and devices enrolled into the system.

Software deployment: EPOS Connect client from EPOS.

Firmware deployment: Device specific firmware from EPOS.

The steps of managing software and firmware in EPOS Manager are:

1. Go to the tab “Pending Updates” to check for new releases from EPOS.  
Approve applicable releases.
2. Go to the tab “Firmware Updates,” or Software Updates.  
Locate release to be deployed.

Click the deploy icon in the Action column.

In the deploy window:

- Select the user group to whom the update should be deployed.
- Select if the release should be mandatory to user(s) or deployed as optional to user(s) or deployed as silent to user(s). Silent update is only applicable for firmware updates.
- Select time schedule for deployment
- Select default or custom message (applicable only for mandatory updates). If Admin selects custom option, he/she can enter the custom message up to 250 characters.
- Deploy


In case of deploying important mandatory updates in the organization, a “Mandatory Update” can be initiated. This ensures that an important update to a device cannot be ignored by end-users, by only allowing the end-user to postpone the update. Reminder will pop up every hour, maximum three times. After the third time the update will take place automatically.


In case of deploying updates which should happen without any user interaction or when the user is logged off from the machine, a “Silent Update” can be initiated. This ensures that an update happens silently in the defined Update Window. After the end date, the “Silent Update” will behave as a mandatory update for the end user.


To schedule the date and time, click in the box and select the date and time as required.


To select the date, click on the specific day in the month of the year.

Default is set to current date and time is set to 10 minutes later.

To select the time, click the  clock button (the format for selecting time is <hour><minutes>)

To return to the date selection, click the  calendar button.

It is possible to download the software or a firmware locally by clicking the download  icon.

To discard any version of the software or firmware, click on the  reject icon.


### 6.1 Pending updates


EPOS sends a notification email to the Tenant Administrator about new software or firmware that has been released. The tenant administrator will be able to view these updates in the “Pending update” tab.

If a release is found to be applicable to be deployed in the organization, the tenant approves the update.

**Important:**

Update packages from EPOS cannot be used for deployment to users until the Tenant Administrator has approved the package for use.

Click the  approve icon to approve the update to be used, hence moving the update to “Firmware Upgrade,” respectively “Software Update.”

- Click the  reject icon to reject the update. The update will be moved from the pending updates tab to the rejected updates tab.

User can filter the data using the versions dropdown which has two options.

- Show Latest: gives the highest Firmware/Software version list.
- Show All: will display all the records

The following details are available in the view:

- Device name or software name targeted by the update
- Type of device
- Version of the firmware/software or voice prompt
- Release notes for the update
- Date and time of receiving the update

### 6.2 Software updates

Under the tab “Software Updates,” new versions of the end-user software “EPOS Connect” will be available for deployment in your organization.

User can filter the data using the versions dropdown which has two options.

- Show Latest: gives the highest Software version list.
- Show All: will display all the records

The following details can be viewed:

- Release notes
- Date and time of receiving the update notification.
- Source from where the update has been sent.

From the column “Action,” you can deploy, download or delete the software released from EPOS.

Note: When deploying a software update of the client a warning will be presented. This is because the EPOS Connect software requires administrative rights for installation. This has the following impact. For users without administrative rights on their PC, they will be prompted to enter user credentials and password for a user with the right permissions.

For user with administrative rights the user can still be prompted with a “Do you want allow the following program to make changes to this computer” message box. This is default windows behavior caused by the UAC settings. This can be removed by changing the UAC settings to Never notify, but this is not recommended. The user has to click yes for the software to install.

The recommended way of updating the software is to use a mass deployment tool such as SCCM.

### 6.3 Firmware updates

Under the tab “Firmware Updates,” new device-specific firmware/voice prompt releases from EPOS will be available for deployment in the organization if approved under “Pending Update.”

To benefit from device firmware improvements and enhanced functionality released via updates from EPOS, it is highly recommended to keep devices in the organization updated.

User can filter the data using the versions dropdown which has two options.

- Show Latest: gives the highest Firmware version list.
- Show All: will display all the records

The following details about the release can be viewed:

- Device name of the device to be upgraded
- Type of the device which can be firmware/voice prompt
- Latest version of the firmware/voice prompt in the device
- Release notes by clicking on the associated icon
- Date and time of receiving the update notification
- Source from where the update is sent.

From the column “Action,” you can deploy, download or delete the software released from EPOS.

### 6.4 Rejected updates

You can choose to reject an update from the Pending Updates view if the update is not found to be relevant. Rejected updates can always be restored from the “Rejected Updates” tab.

The following details about the release can be viewed:

- Name of the firmware, software or voice prompt in the device
- Type of target for the release
- Firmware, software or voice prompt version
- Release notes
- Date and time for receiving the release

## 6.5 Deployment Status

All active deployment jobs are listed in this view.

The following information is presented here:

- Job Created : Time stamp the job was created.
- Type: The job type. (Currently only Update)
- Device: The device, software or voice prompt targeted with this job.
- Group name: The name of the group the update is sent to.
- Version: Version of the software, firmware or voice prompt that was deployed.
- Devices Reached: KPI of the distribution.
- Update success: KPI of update being completed.

The “Device Reached “ KPI represents:

Gray	color as status is not yet available – It is a background job, it collects the KPI status and display one of the below status after some time interval.
Green	color as download success.
Red	color as download not yet done.

On hovering over the color bar, it shows the no of devices for which firmware download was success or not yet downloaded.

The “Upgrade Status” KPI represents:

Gray	color as status is not yet available – It is a background job, it collects the KPI status and display one of the below status after some time interval.
Green	color as Upgrade success
Red	color as upgrade failed
Orange	color as upgrade pending.

When clicking the color bar or device link will bring you to the details page.

Note: The KPI information is only rendered after 60 minutes and will therefore only be available thereafter.

## 6.6 Deployment details

The deployment details page gives you more specific information of the actual status.

- Scheduled Time: The schedule time that was given when deployed.
- Update: The name of the device or software and its new version.
- Deploy Group: The name of the group the update is sent to.
- Devices Reached: KPI of the distribution.
- Update success rate: KPI of update being completed.
- Deploy Type: Update type deployed to end-users Mandatory/Optional/Silent
- Deployment Start Date: The date from when Silent update is applicable.
- Deployment End Date: The date when Silent update period ends.
- Update Window: Updates will be applied only during this time interval.

The “Device Reached “ KPI represents:

Gray	color as status is not yet available – It is a background job, it collects the KPI status and display one of the below status after some time interval.
Green	color as download success.
Red	color as download not yet done.

On hovering over the color bar, it shows the no of devices for which firmware download was success or not yet downloaded.

The “Upgrade Status” KPI represents:

Gray	color as status is not yet available – It is a background job, it collects the KPI status and display one of the below status after some time interval.
Green	color as Upgrade success
Red	color as upgrade failed
Orange	color as upgrade pending.

Update Success tab displays the devices for which deployment succeeded.

Update Failure tab displays the devices for which deployment failed.  
(Update was downloaded and update attempt was done.)

Update pending tab displays the devices for which update is pending.  
(Download had been done but update has not yet started.)

Device not Reached tab displays the devices which have not yet downloaded the update.



## 7. Configuration

EPOS Manager enables the possibility to read the settings of the connected devices and softphone settings of EPOS Connect.

Using the tool you are also able to push configurations and lock specific settings on the end users devices by pushing a configuration package.

In the current example we will be pushing a regulatory compliance setting to a group. The flow is very similar to a firmware update so prerequisites are the same.

Before start using the configuration please ensure that the devices are updated with the latest firmware.

### 7.1 Configuration Overview

The configuration overview page is designed to have a one place to see and easily compare a configuration setting. The page lists all devices that are applicable for a configuration and gather all the settings in one place.

In Configuration overview layout, implemented 'Device Type' filter and currently this filter supports to filter on four device types

- Wireless DECT
- Wired USB
- Wireless BT
- Speakerphone
- EPOS Connect

By default, 'Wireless DECT' filter will be applied

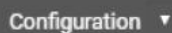
In this view all configurable devices are listed and you can do a global search to filter on either devices, users or deployed configuration package.

The deployed pack column shows if and what configuration package has been pushed to the specific device.

Now, we can see configuration package version numbers

Shows the number of configuration parameters available on the product. Clicking it will open up a view of all the configurations and their value on the product.

If the number shows 0 it means that the device did not support any configuration. Most likely because the firmware version is not supporting it. Suggestion is to update to latest firmware.



For comparing a single value, it is possible to click the drop down on the title bar to select 1 of the available configurations. The grid now changes to only show the selected configuration and value. This provides an easy way to compare many devices quickly just by looking.

### 7.2 Pending Configurations

Packages for all our supported products are available under the Configuration section selecting the Pending Configurations TAB. Here is the option to either approve or reject them. When approving the package is moved to either the device configuration or software configuration TAB based on the configuration type and when rejected they are moved into Rejected Configurations TAB.

User can filter the data using the versions dropdown which has two options.

- Show Latest: Will show highest version followed by the latest timestamp of the received On / Uploaded On column.
- Show All: will display all the records

### 7.3 Rejected Configurations

All rejected packages are moved to this TAB. The main reason for rejecting them is to filter them away from the daily working folders in case the product models are not relevant for your portfolio. Rejected configurations packages can be restored by clicking the Restore Configuration button.

### 7.4 Device Configurations

The device Configuration TAB contains a list of all raw device configuration packages received and approved. These packages will be read only when received and all values will be empty.

User can filter the data using the versions dropdown which has two options.

- Show Latest: Will show highest version followed by the latest timestamp of the received On / Uploaded On column.
- Show All: will display all the records

#### 7.4.1 Duplicate configuration package

For editing the package and choosing the values of the configuration it is needed to create a copy of the package. This is done by clicking the Copy icon on the line, providing a new pack name and clicking Save.

A new package is then added and an Edit icon is shown on the line.

#### 7.4.2 Edit configuration package

Once the package is duplicated it is now editable and a small edit icon will appear.

Package can now be duplicated again, deployed, edited or deleted.

Clicking the edit button opens the package to allow setting the values.

The values can be selected by opening the drop down. When a selection have been made a graphical representation is shown for the device MMI where available. When selecting a value and deploying it, the given value will be locked on the end user device and the user will not be able to change the value themselves, not even by changing the physical switch. To release the setting again (so the end user can decide setting), you need to choose the blank value and redeploy the package.

When settings have been selected, remember to click the “Save” button.

#### 7.4.3 Deploying Configuration

Once package is ready, it can be deployed to a user group. This is done by clicking the Deploy icon on the line.

When deploying you need to choose a user group (see section 3). To send the package click the Deploy Now button. The configuration will happen silently on the end user device on the next heartbeat.

#### 7.4.4 Deployment Status

Very similar to the firmware deployment it is possible to follow the status of the deployment. (Referring to the section 5.5).

Clicking the specific job gives more detail regarding who is missing a deployment and potential reason.

Reasons are often due to a firmware is not supporting configuration. Please update to latest update.

### 7.5 Software Configuration

The Software Configuration TAB contains a list of all raw EPOS Connect softphone configuration packages received and approved. These packages will be read only when received and all values will be empty.

User can filter the data using the versions dropdown which has two options.

- Show Latest: Will show the highest version followed by the latest timestamp of the received On / Uploaded On column.
- Show All: will display all the records

All grid action use cases like duplicating, editing and deploying the packages are similar to the 'Device configurations' TAB grid action use cases. (Referring to the section 7.4.1 to 7.4.4)

## 8. Reports

Reports offer an in-depth analysis of existing conditions in the company.

The reports have two sub-menus showing the details of the following:

- User
- Device
- Call activity
- Softphone

A chart being viewed can be downloaded or printed by clicking the  shown at the right top corner of the chart interactive region.

To select the desired output format, click the icon and select the relevant option. The below stated options are available to the tenant:

1. PNG image
2. JPEG image
3. PDF document
4. SVG vector image

Click the legends to show or hide the values in the existing chart.

An active user for a monthly statistics is defined as: ‘

“Someone who has used the EPOS Connect at least once during the month”

An active user for daily statistics is defined as:

“Someone who has used the EPOS Connect at least once during the day”

Note: All the data for the reports are with reference to Greenwich Mean Time (GMT).

### 8.1 User

The total number of active and inactive users will display an index with a standard goal and help to identify inactive devices. A status summary of deployed EPOS Connect client software compared to available versions is also available.

#### 8.1.1 User Overview

“Users overview” will show the daily statistics summary of the total number of active users in a week.

The pointer can be placed over any section of the day column for the exact key values.

#### 8.1.2 Client versions

The Client versions pie chart shows the version of the EPOS Connect being used.

#### 8.1.3 Monthly Overview

The overview will show the monthly statistics summary of the total number of users and active users in a year. To view the exact numeric value, position the pointer over any section. This graph can be used to monitor that your installations correspond to the number of users/employees.

### 8.2 Device

Evaluating the statistics of the devices used by the end-user reflects the device usage by the company.

The device menu does a competitive analysis based on the competitors and the product criteria.

### 8.2.1 Device Overview

There are different series of devices used by the end-users. “Devices overview” help to find out the usability index of the active devices on a daily basis.

- Wired ED headsets (analog headsets)
- Wireless DECT headsets
- Wireless BT headsets (Bluetooth products)
- Wired USB headsets
- Speakerphones

The trend of the active devices can be seen on a weekly basis.

### 8.2.2 Other devices

The “Other Devices” menu shows the usage of EPOS products as well as devices from competitors.

Click on a segment to explode that segment for a better understanding of the comparison.

### 8.2.3 Device adoption

An overview shows a clear synopsis of the total number of devices (active/inactive) with the following active devices of the series.

The following active vs. inactive devices under series are shown in the chart.

- Wired ED headsets (analog headsets)
- Wireless DECT headsets
- Wireless BT headsets (Bluetooth products)
- Wired USB headsets
- Speakerphones

The chart identifies the number of devices that have not connected in three different time ranges and the following selections are available:

- Monthly: the chart shows a full calendar month.
- Half Yearly: the chart shows a six calendar months.
- Yearly: the chart shows a full calendar year.

By clicking the specific product group in the graph, it is possible to get a detailed overview of the product models under the groups.

### 8.2.4 Headsets per User

This report overview shows the user count based on the number of headsets being used.

### 8.2.5 Update Overview

The overview will show the percentage of the devices which are having the latest version to the ones which are yet to be updated. The firmware version approved by the tenant is taken as reference to calculate the percentage.

## 8.3 Call Activity

Evaluating the statistics of the call activity of the end-user reflects the call activity statistics by the company.

The Call activity menu does an analysis based on the call type and call duration of softphones and devices.

### 8.3.1 Call Overview

Call overview gives the analysis about the number of incoming and outgoing calls attended during the specified period.

Following are the different time period filters can be applied on the chart

- Last week: the chart shows the number of calls attended daily basis for the last seven days
- Last Month: the chart shows the number of calls attended daily basis for the last month i.e. last thirty days.
- Monthly: the chart shows the number of calls attended monthly basis for the last one year
- Half Yearly: the chart shows the number of calls attended half yearly basis for the last one year
- Yearly: the chart shows the number of calls attended yearly basis for last one year

By clicking on a specific series/bar in the chart, more details of the call for the corresponding time period will be displayed in the table view.

The following details can be found in the table view.

- User Name
- Softphone Name
- Softphone Version
- Device
- Type
- Start Time
- End Time
- Duration

The user has an option to export the data to an excel sheet by clicking the excel icon present on the top right side

### 8.3.2 Call Duration – Device

Call duration-Device tab gives the information about the call duration of different devices during the specified period.

Following are the different time period filters can be applied on the chart

- Last week: the chart shows call duration for which each device used on daily basis for the last seven days
- Last Month: the chart shows call duration for which each device used on daily basis for the last month i.e. last thirty days.
- Monthly: the chart shows call duration for which each device used on monthly basis for the last one year
- Half Yearly: the chart shows call duration for which each device used on half yearly basis for the last one year
- Yearly: the chart shows call duration for which each device used on yearly basis for the last one year

By clicking on a specific item in the chart the drilldown data for the corresponding time interval will be displayed in the table where all the details of the call for the different **devices** will be displayed

The following details can be found in the table view.

- User Name
- Softphone Name
- Softphone Version
- Device
- Type
- Start Time
- End Time
- Duration

The user has an option to export the data in the table to an excel sheet by clicking the excel icon present on the top right side.

### 8.3.3 Call Duration – Softphone

Call duration–Softphone tab gives the information about the call duration of different softphones during the specified period.

Following are the different time period filters can be applied on the chart

- Last week: the chart show call duration for which each softphone used on daily basis for the last seven days
- Last Month: the chart shows call duration for which each softphone used on daily basis for the last month i.e. last thirty days.
- Monthly: the chart shows call duration for which each softphone used on monthly basis for the last one year
- Half Yearly: the chart shows call duration for which each softphone used on half yearly basis for the last one year
- Yearly: the chart shows call duration for which each softphone used on yearly basis for the last one year

By clicking on a specific item in the chart the drilldown data for the corresponding time interval will be displayed in the table where all the details of the call for the different **softphones** will be displayed

The following details can be found in the view.

- User Name
- Softphone Name
- Softphone Version
- Device
- Type
- Start Time
- End Time
- Duration

The user has an option to export the data in the table to an excel sheet by clicking the excel icon present on the top right side.

## 8.4 Softphone

Softphone overview shows the statistics of the different Softphones used spread across the company.



#### 8.4.1 Softphone Adoption

Softphone adoption gives the analysis of the UC and CC clients using the different softphones of different brands. This section has three charts.

**SOFTPHONE BRAND SHARE:** This report gives the information about percentage of total softphones of different brands.

**SOFTPHONE SHARE:** This report gives the information about the percentage of total users using different softphones for a given brand.

Filter option is available to change the brand and filter the specific data for the selected brand.

**SOFTPHONE VERSION:** The report gives the information about the number of users using a specific version softphone used.

Filter option is available to change the softphone and filter the specific data for the selected softphone.

By clicking on a specific chart series/bar in the above charts, more details will be displayed in table view.

The following details will be included in the table view.

- User Name
- Softphone
- Version
- Host Name
- Model
- Operating System
- OS version
- System Type

Three filter options in the table view, to filter based on Brand, Softphone and Version.

The user has an option to export the filtered data to an excel sheet by clicking the excel icon present on the top right side.

## Contact information

Support Portal: [eposaudio.com/enterprise-support](https://eposaudio.com/enterprise-support)  
 E-mail: [software-help@eposaudio.com](mailto:software-help@eposaudio.com)  
 Phone: Find your local support phone number and opening hours here below.

### ASIA-PACIFIC

**Australia**  
 T +61 2 9910 6700  
 8:00 - 17:00

**China**  
 T +86 1057319666  
 9:00 - 18:00

**Hong Kong S.A.R., China**  
 T +85 234128400  
 9:00 - 18:00

**India**  
 T 1 800 200 3632  
 9:00 - 18:00

**Japan**  
 T +81 364 068 919  
 9:00 - 18:00

**New Zealand**  
 T +64 (9) 580 0489  
 8:00 - 17:00

**Singapore**  
 T +65 6408 5143  
 9:00 - 18:00

**South Korea**  
 T +82 1544 1699  
 10:00 - 18:00

**Europe**  
**Austria**  
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 8:00 - 17:00

**Belgium**  
 T +32 28080784  
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**Denmark**  
 T +45 89882841  
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**Finland**  
 T +358 942450352  
 8:00 - 17:00

**France**  
 T +33 170610386  
 8:00 - 17:00

**Germany**  
 T +49 3030808045  
 8:00 - 17:00

**Hungary**  
 T +36 14088056  
 8:00 - 17:00

**Iceland**  
 T +353 15262572  
 8:00 - 17:00

**Ireland**  
 T +353 15262572  
 8:00 - 17:00

**Luxembourg**  
 T +352 27860234  
 8:00 - 17:00

**Netherlands**  
 T +31 20-8080956  
 8:00 - 17:00

**Norway**  
 T +47 23961052  
 8:00 - 17:00

**Russia**  
 T 8800-1008557  
 8:00 - 17:00

**Spain**  
 T +34 911238085  
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**Sweden**  
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**Switzerland**  
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**Brazil**  
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**Mexico**  
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**NORTH AMERICA**  
**Canada**  
 T 1-800-895-7412  
 8:00 - 17:00

**United States**  
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 8:00 - 17:00

**MIDDLE EAST/AFRICA**  
**United Arab Emirates**  
 T 800 035703844  
 8:00 - 17:00