

## Feature Overview

The Phone and User assignment functionality is the foundation for all other service setup components of the Altus Voice PBX service. This process ties together all the pieces of the service to make it available for user. The system is designed to allow customers and partners to quickly configure and modify user station and phone assignments in real time without requiring extensive technical knowledge.

There are four basic components to relate in order for a user to be ready for service:

1. The phone number or DID
2. The station type or feature package
3. The equipment to be assigned (this can be optional)
4. The end user assigned to the phone

## Feature Prerequisites

Before the User Assignment service can be used the following conditions must be met:

- At least one phone number needs to be in inventory. The number can be a 2-way number, 2-way Remote number or an inbound only number.
- At least one station package must be in inventory.
- At least one device needs to be in inventory. This is optional if a virtual station is being built.
- If an extension is required, it can be a 2 to 6-digit number conforming to the following rules:
  - The user's extension cannot conflict with special services numbers. As a result, the following numbers cannot be assigned as extensions: 00, 011, 211, 311, 0311, 1311, 411, 0411, 1411, 511, 611, 0611, 1611, 711, 811, 911, 0911, 1911.
  - If the last 4 digits of the user's telephone number conflicts with a 4-digit special services numbers, the extension will be left blank when the user is provisioned. If an extension number is required, any non-conflicting 2 to 6-digit number can be assigned.

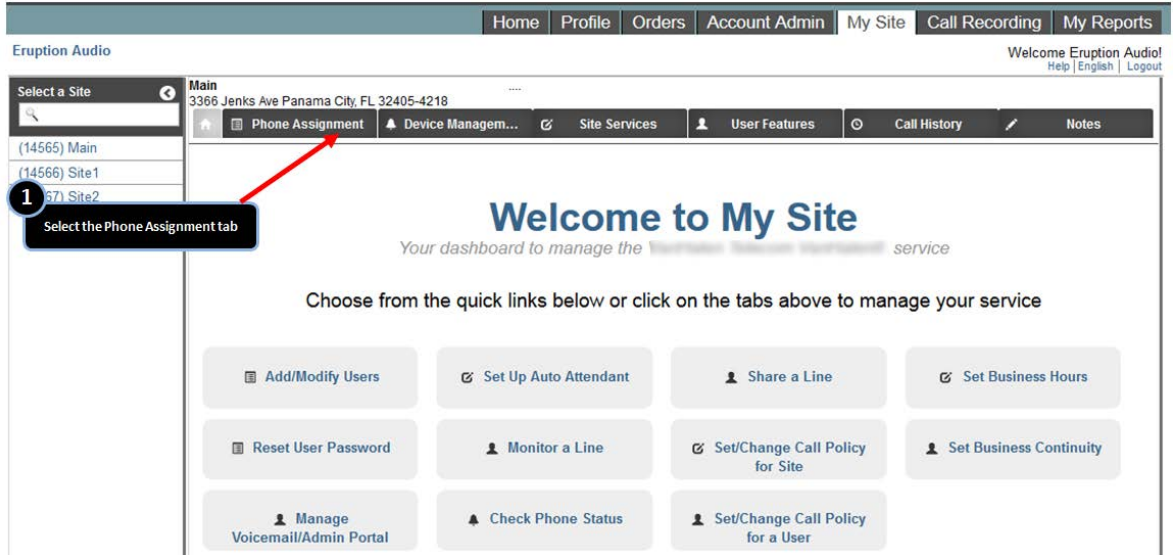
## Feature Setup

Prior to setting up and Site Services, or allowing Users to make calls, the Site administrator must set up the Users. Once logged into My Account, simply follow the steps detailed below.

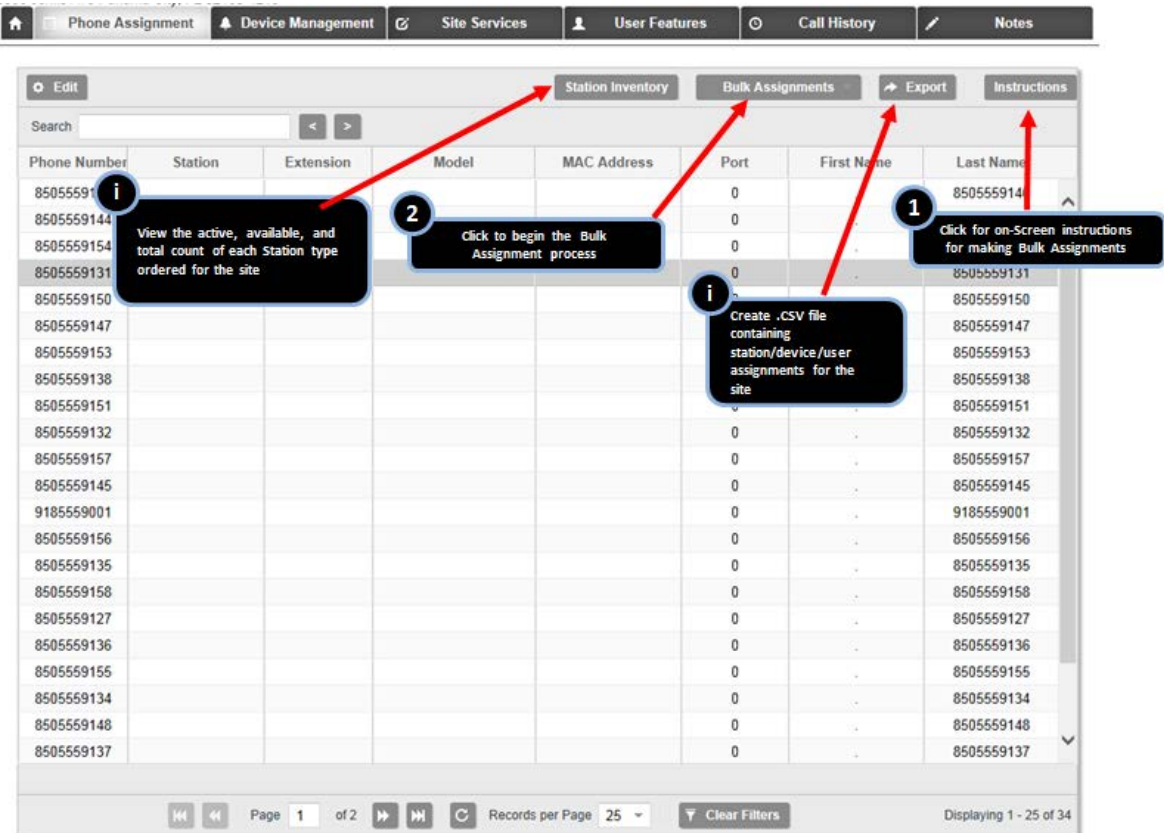
### Step 1. Go to My Site and select the appropriate Site to configure



## Step 2. Go to Phone Assignments



**Step 3. Determine if you are assigning a single station or multiple stations through bulk upload**  
 If you are assigning in bulk, follow the on-screen directions. If you are assigning a single station or one at a time, continue to step 4.



## Step 4. Select the Phone Number to assign

The screenshot shows a web interface for phone assignments. At the top, there are navigation tabs: Phone Assignment, Device Management, Site Services, User Features, Call History, and Notes. Below these are sub-tabs: Edit, Station Inventory, Bulk Assignments, Export, and Instructions. A search bar is present above a table with the following columns: Phone Number, Station, Extension, Model, MAC Address, Port, First Name, and Last Name. The table contains 20 rows of data. A callout box with a circled '1' points to the first row (Phone Number: 8505559146) and contains the text: "Select the Phone Number to assign station/phone/user". At the bottom of the interface, there are pagination controls: Page 1 of 2, Records per Page 25, and a Clear Filters button. The status bar at the bottom right indicates "Displaying 1 - 25 of 34".

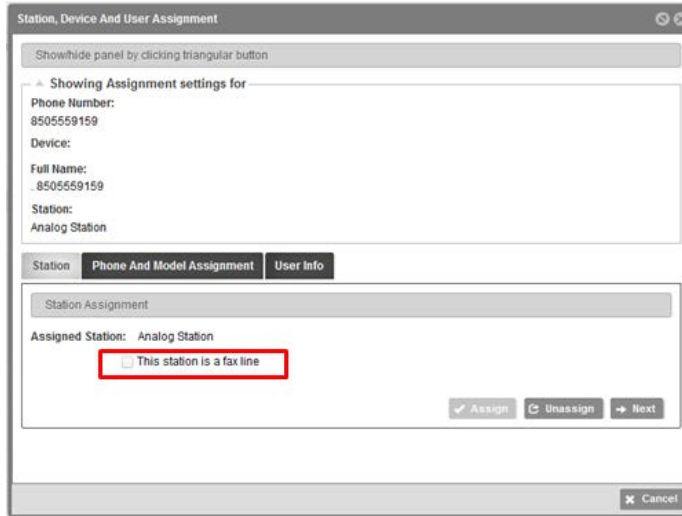
## Step 5. Assign the Station (Defines the available User features)

The screenshot shows a dialog box titled "Station, Device And User Assignment". It has a "Showing Assignment settings for" section with tabs for "Station", "Phone And Model Assignment", and "User Info". A callout box with a circled '1' points to the "Station" dropdown menu, with the text: "Select the Station type from the drop down". The dropdown menu is open, showing options: Common Plus Station, Executive Station, Analog Station, Messaging Station, and Office Station. Another callout box with a circled '2' points to the "Assign" button, with the text: "Click the Assign button". Other buttons visible are "Unassign" and "Next". A "Cancel" button is at the bottom right.

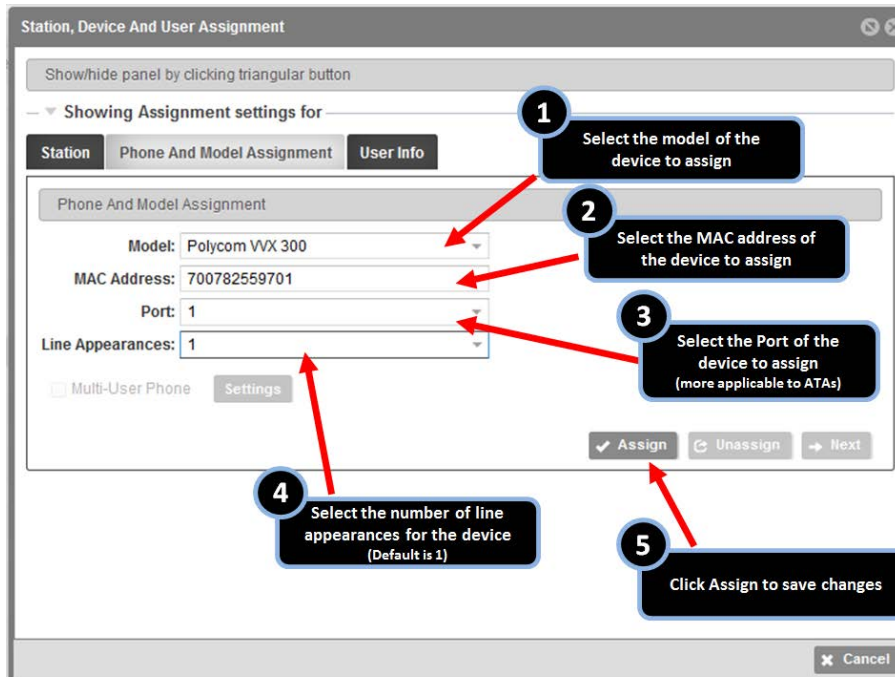
*Note: The list of available Station Types will reflect the current list of available station types that can be assigned for that site. If additional stations are required, an order must be entered to add them, or an existing assigned station must be unassigned.*

In the event that a Station is being reassigned from a previous user, you will be prompted if there are any Voicemail messages left for the previous User, and asked if you wish to remove those messages for the new assignment or not, simply Click to select Yes or No and proceed.

To designate a station as Fax lines (removing compression), select the checkbox shown below:



## Step 6. Assign the Phone



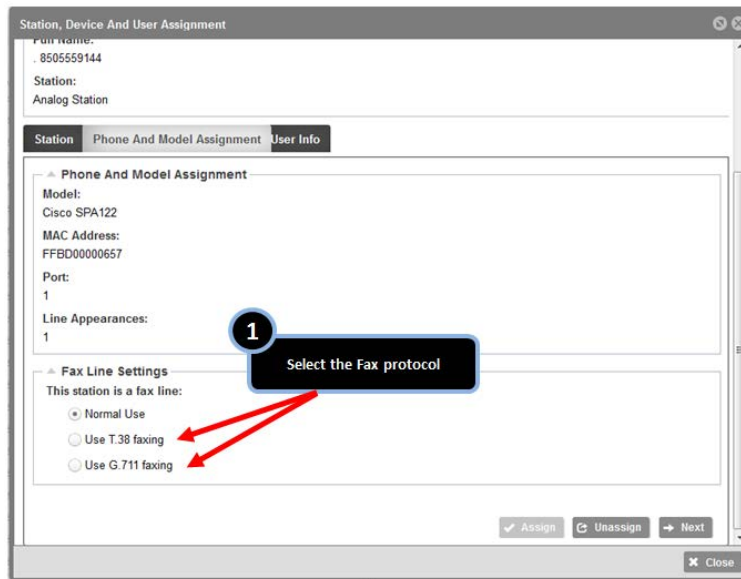
*Note: The list of available Phones and MAC addresses will reflect all phones related to this customer site – even if they already assigned to other users. This allows the option to assign multiple phone numbers to the same phone.*

*Note that when adding Multiple Line Appearances (MLA) in phone assignments:*

- The number of line appearances displayed on the phone will be determined by the number of buttons the model supports.
- The maximum number of call waiting calls in queue is 4 per station. Additional line appearances can be assigned, but do not extend the concurrently usable number beyond 4. The exceptions are Hosted Square Key 8-line and 12-line station types.
- Shared Call Appearances only display one Line Appearance for the shared station, regardless of the MLA configuration for the primary device.
- MLA does not apply to soft clients as they only support a single line appearance.

Note: Once Assigned, the Multi-User Phone and Settings button are enabled. These are used only if the phone is designated as a Hoteling Host. See the Hoteling QRG for details.

If an analog station is selected, assign the ATA, and specify the protocol for Fax or general analog use. T.38 is the default for faxing and will support higher speed fax machines.



## Step 7. Define the User

*Note: The User will have a default assignment for Outbound Caller ID. This will either be the Main number for the site, or the individual users phone number if the phone number is a 2Way DID. The default Caller ID number is shown in the above screen, and can be changed to any 2 Way DID available on the site by clicking on the '2Way List' and selecting another number. This allows the users to display different appearances when making outbound calls.*

Once saved, the Show Assignment settings area will display the revised information for the user. Closing the Station, Device and User Assignment box will return to the main view of Phone Assignments and reflect the recently completed assignments reflected.

Station, Device And User Assignment

Show/hide panel by clicking triangular button

Showing Assignment settings for

Phone Number:  
8505559139

Device:  
Polycom VVX 300

Full Name:  
Test User

Station:  
Executive Station

Station Phone And Model Assignment User Info

Create/Edit User Info

End User Info

First Name:  
Test

Last Name:  
User

Caller ID#:  
8505559139

MyPhone User Info

User Id:  
testuser

Email:  
name@domain.com

Cancel

Phone Assignment Device Managem... Site Services User Features Call History Notes

Edit Station Inventory Bulk Assignments Export Instructions

Search

Phone Number	Station	Extension	Model	MAC Address	Port	First Name	Last Name
8505559127					0	.	8505559127
8505559136					0	.	8505559136
8505559155					0	.	8505559155
8505559148					0	.	8505559148
8505559137					0	.	8505559137
8505559126					0	.	8505559126
8505559159	Analog Station				0	.	8505559159
8505559160					0	.	8505559160
8505559133					0	.	8505559133
8505559139	Executive Station	9139	Polycom VVX 300	70078259701	1	Test	User
8505559161	Executive Station	9161			0	.	8505559161
8505559146	Executive Station	9146			0	.	8505559146
8505559158	Executive Station	9158			0	.	8505559158
8505559147	Executive Station	9147			0	.	8505559147
8505559150	Executive Station	9150			0	.	8505559150
8505559143	Common Plus...	9143			0	.	8505559143
8505559145	Hosted Squar...	9145	Polycom300	B12312313712	1	.	8505559145
8505559131	Executive Station	9131	Polycom300	B12312313712	1	cbanner	8505559131
9185559001	Executive Station	9001	Polycom300	691462613486	1	.	9185559001
8505559138	Executive Station	9138	Polycom300	266168082897	1	BB	Bill
8505559135	Executive Station	9135	Polycom300	266168082897	1	David	Lee

Page 1 of 2 Records per Page 25 Clear Filters Displaying 1 - 25 of 41

**Step 8. Resetting User Logins**

Station, Device And User Assignment

Show/hide panel by clicking triangular button

Showing Assignment settings for

Station Phone And Model Assignment **User Info**

Create/Edit User Info

End User Info

First Name: Test

Last Name: User

Caller ID#: 8505559139

Extension: 9139

MyPhone User Info

User Id: testuser

Email: user@domain.com

Reset Voicemail Password Delete MyPhone User Reset MyPhone Password Save

Cancel

1 Select the User Info tab

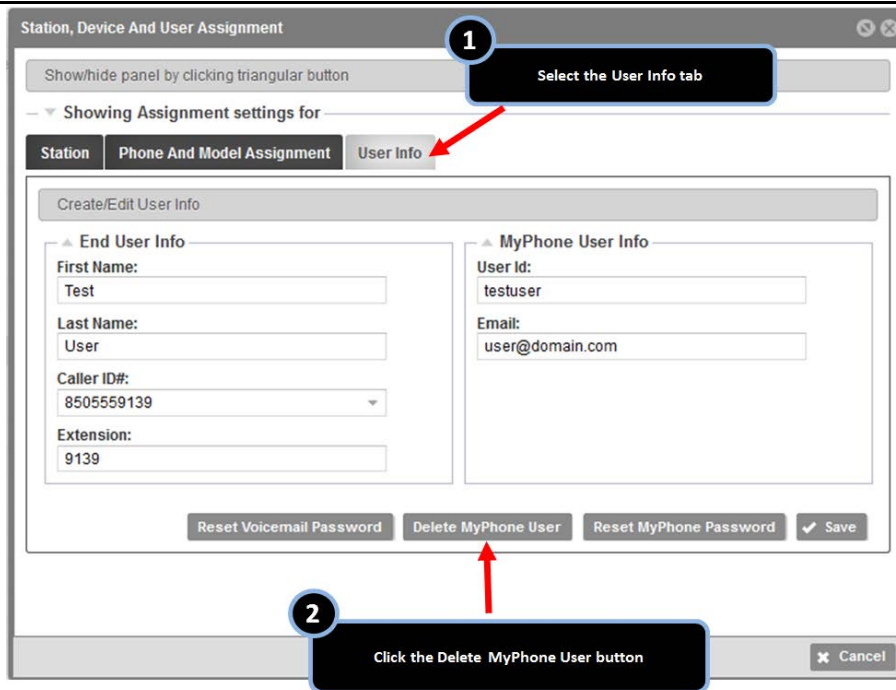
2 Click the respective button to reset the Voicemail Password or My Phone Password, sending an email to the address above

Once completed, the User will receive an email with their new login credentials.

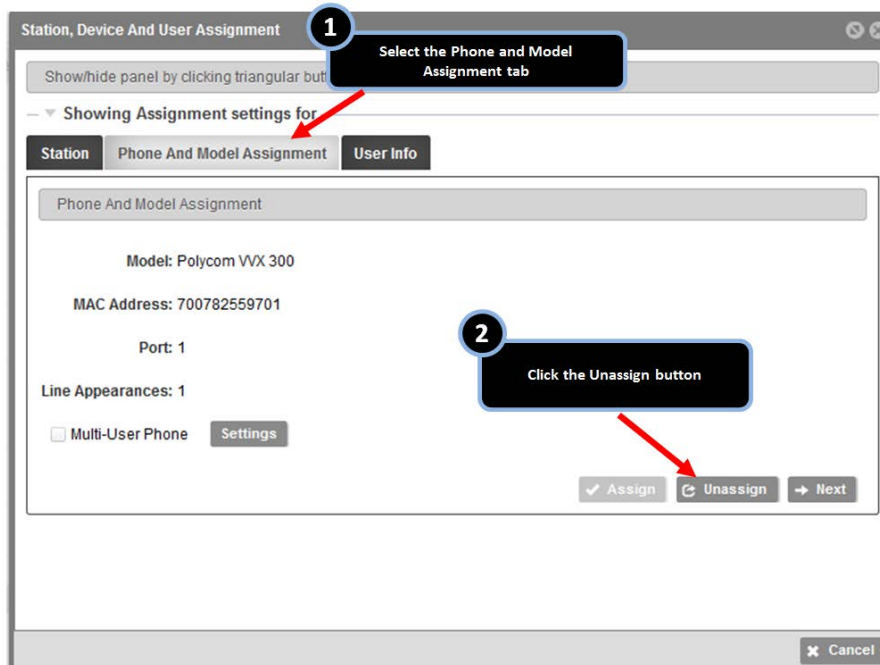
**Step 9. Unassigning Users, Phones, & Stations**

Removal of assignments is a simple matter of repeating the above steps in a manner that results in removed User information, no phone assignment, and no station assignment. This would be required in the event that partial disconnection of service is required, or if change out of phones or User is required.





To unassign a device



To unassign a station, unassign the device, then

