
Feature Overview

Hoteling enables a user's phone profile of phone number, features, and calling plan to be temporarily loaded onto a shared (host) phone. It is comprised of two features: Hoteling Host and Hoteling Guest that work together to allow the customer to designate specific phones (hosts) that users (guests) can temporarily log into and use as their own phone. When a guest logs into a host phone, their user profile is automatically transferred to the device. The host device then becomes the user's primary device while they are logged into it.

The Hoteling feature is great for companies with traveling users which enables worker to be in a remote office but still have the functionality of their main desk phone with the same number all of its features. It is also useful in a Call Center environment where a site may have a limited number of phones but need their employees to share their phones over multiple shifts while being able to maintain a specific profile acting as their agent identity in the Call Center.

Feature Prerequisites/Restrictions

- Supported station types:
 - Premium User, Hosted PRI - User
- Supported phone models for the Host device:
 - Polycom SoundPoint IP 450, 550, 560, 650, 670 Phones configured with UC software version 4.0.4 or higher
 - Polycom VVX 300, 310, 400, 410, 500, 600 Phones configured with UC software version 4.1.5 or higher
- Only lines that are set up as private (not shared) in the Polycom phones can be configured to act as a host. The administrator should not configure the Sharing service on the user that is permanently assigned to the host device.
- The Host device must only be configured with one line registration. The host's line can be allowed to be on multiple line keys on the phone but all the line keys must share the same line registration (as in the Hosted Square Key configuration).
- The Hoteling Host's line can only be assigned on one device; it cannot be shared on other phones.

Feature Operation

Hoteling supports two ways for the Hoteling Guest to "sign-in" to the host phone.

- Directly on the host phone: After the feature is set up, a soft-key will be available on the phone. To sign in, the user hits the sign-in button and is prompted to enter their 10 digit telephone number and voice portal password.
- Through My Phone dashboard: Once configured in the My Site administrative dashboard, the user will have a button available under the My Phone dashboard.

Feature Setup

Step 1. Log in to My Site

The screenshot shows the top navigation bar with tabs: Home, Profile, Orders, Billing, Account Admin, **My Site**, Call Recording, and My Reports. The 'My Site' tab is circled in red. Below the navigation bar, there are sections for 'Account Summary', 'Enterprise Test', 'Account Information', and 'Manage My Account'. A callout box with the number '1' and the text 'Select the "My Site" tab' has a red arrow pointing to the 'My Site' tab.

Step 2. Select the appropriate Site to configure

The screenshot shows the 'Select a Site' dropdown menu with a search box and a list of site IDs. A callout box with the number '2' and the text 'Select a site from the scroll box or search for a site by name or site ID and then select the site' has two red arrows pointing to the search box and the list of site IDs.

Step 3. Go to the Phone Assignments – Select the Host Station

The screenshot shows the 'Welcome to My Site' dashboard. The top navigation bar has tabs: Home, Profile, Orders, Billing, Account Admin, My Site, Call Recording, and My Reports. The 'Phone Assignment' tab is circled in red. A callout box with the number '1' and the text 'Select "Phone Assignment"' has a red arrow pointing to the 'Phone Assignment' tab. The dashboard content includes a 'Welcome to My Site' heading, a subtitle 'Your dashboard to manage the SipAdvantage SipAdvantageTest service', and a list of quick links: Add/Modify Users, Set Up Auto Attendant, Share a Line, Set Business Hours, Reset User Password, Set Up Hunt Group, Monitor a Line, Set/Change Call Policy for Site, Set Business Continuity, Manage Voicemail/Admin Portal, Check Phone Status, and Set/Change Call Policy for a User.

Step 4. Select the station which will be the Host device

Enterprise Test

1000-1
1009 Pruitt Rd Suite B The Woodlands, TX 77380

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

Station Inventory | Export | Instructions

Phone Number	Station	Extension	Model	MAC Address	Port	First Name	Last Name	UC
2125413100	Mobile-only Stati...	3100			0		2125413100	
2125413103	Loudspeaker SR...	3103			0		2125413103	
2125413104	Alternate Num...				0		2125413104	
2125413201	Mobile-only Stati...	3201			0	Johnny	Mobile	
2125413202	Mobile-only Stati...				0		2125413202	
2125413203	Executive Station	3203			0		2125413203	<input checked="" type="checkbox"/>
2125413204	Alternate Num...				0		2125413204	
2125413206	Call Center DNIS				0		2125413206	
2125413207					0		2125413207	
2125413208	Call Center DNIS				0		2125413208	
2725413201	Analog Station				0		2725413201	
2725413202	Call Center DNIS				0		2725413202	
3422981000	Alternate Num...				0		3422981000	
3422981014	Hosted Square ...				0		3422981014	<input checked="" type="checkbox"/>
3422981024	Executive Station	1024	Polycm500	734984598601	1		3422981024	<input checked="" type="checkbox"/>
3422981044					0		3422981044	
3422981055					0		3422981055	
3422981063					0		3422981063	
3422981070	Announcement ...	1070			0		3422981070	
3422981081					0		3422981081	
3422981084					0		3422981084	
3422981094					0		3422981094	
3422981104	Common Area ...	1104	Polycm550	EEA14940002	1		3422981104	

Page 1 of 7 | Records per Page 25 | Clear Filters | Displaying 1 - 25 of 160

Step 5. Go to Phone and Model Assignment and enable Multi-User Phone

Station, Device And User Assignment

Device: Polycom VVX 300
Full Name: Kimberly Jones
Station: Executive

Station | **Phone And Model Assignment** | User Info

Phone And Model Assignment

Model: Polycom VVX 300
MAC Address: 398474276902
Port: 1
Line Appearances: 6

Multi-User Phone Settings

Assign Unassign Next

Multi-User Phone Settings 9184988102

Enforce Association Limits to: Hours

Save Cancel

Step 6. Go to User Features

Enterprise Test

Home Profile Orders Billing Account Admin My Site Call Recording My Reports

Welcome Enterprise Test! Help | English (United States) | Logout

1000-1
1009 Pruitt Rd Suite B The Woodlands, TX 77380

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

Select a Site

(19164) 1000-1
(19163) 1001
(19162) 1002
(19213) 1003
(19212) 1004
(19211) 1005
(19210) 1006
(19209) 1007
(19208) 1008
(19207) 1009
(19206) 1010
(19205) 1011
(19204) 1012
(19203) 1013
(19202) 1014
(19201) 1015
(19200) 1016
(19199) 1017

Welcome to My Site
Your dashboard to manage the SipAdvantage SipAdvantageTest service

Choose from the quick links below or click on the tabs above to manage your service

- Add/Modify Users
- Set Up Auto Attendant
- Share a Line
- Set Business Hours
- Reset User Password
- Set Up Hunt Group
- Monitor a Line
- Set/Change Call Policy for Site
- Set Business Continuity
- Manage Voicemail/Admin Portal
- Check Phone Status
- Set/Change Call Policy for a User

Step 7. Select Hoteling Guest

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

Hide Buttons Hoteling Guest

Call Waiting

Call Forward Always

Call Forward Busy

Call Forward No Answer

Business Continuity

Sharing

Monitoring

Alternate Numbers

Unified Messaging

Privacy

Push To Talk

Recording

Outbound Calling

Inbound Calls

Hoteling Guest

Analog Hotline

Double-click on the row to change hoteling guest service for the user

Edit

Search

First Name	Last Name	Phone Number	Extension
.	8505559161	+1-8505559161	
.	8505559146	+1-8505559146	
.	8505559158	+1-8505559158	
.	8505559147	+1-8505559147	
.	8505559150	+1-8505559150	
cbanner	8505559131	+1-8505559131	
.	9185559001	+1-9185559001	
BB	Bill	+1-8505559138	
David	Lee	+1-8505559135	
.	8505559132	+1-8505559132	

Page 1 of 2 Records per Page 10 Clear Filters Displaying 1 - 10 of 16

Step 7. Select the user to have a transportable profile / be a hoteling guest.

The screenshot shows the 'Transportable Profile' interface. At the top, there is a instruction: 'Click on the checkbox to enable the transportable profile service for the user'. Below this is a table with columns: First Name, Last Name, Phone Number, and Extension. The table contains one row with the following data: First Name: David, Last Name: Roth, Phone Number: +1-9186695003, Extension: (empty). To the left of the table is a search bar and navigation buttons. Above the table is an 'Edit' button with a gear icon. A red arrow points from a callout box 'Hit "Edit"' to the 'Edit' button. Another red arrow points from a callout box 'Select a user' to the 'Phone Number' field. At the bottom, there are pagination controls: 'Page 1 of 1', 'Records per Page 10', and 'Clear Filters'. The status 'Displaying 1 - 1 of 1' is shown at the bottom right.

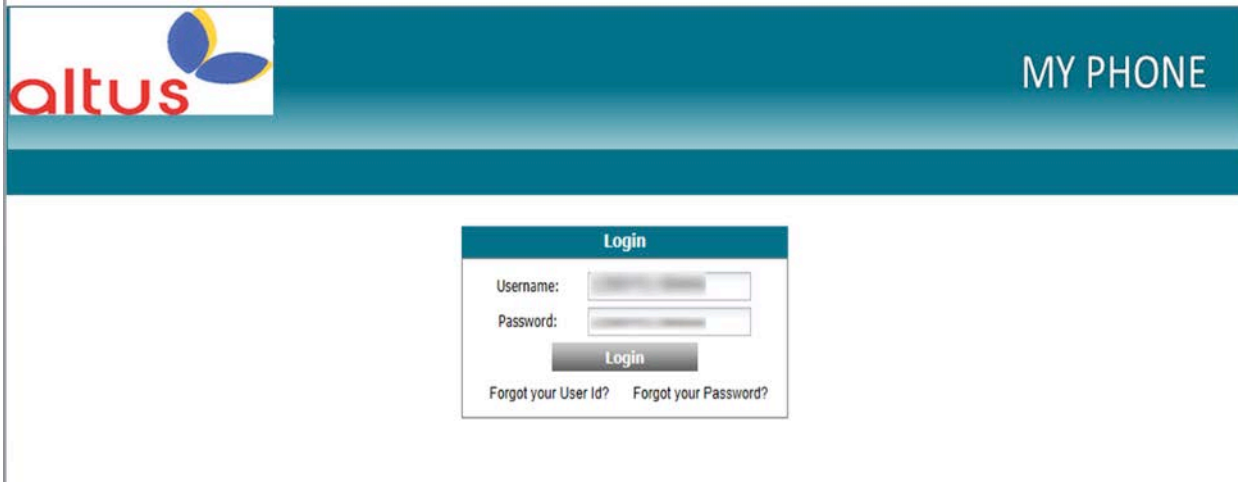
Step 8. Enable or Disable a user to have a transportable profile and be able to log into host devices as a Guest user.

The screenshot shows the 'Edit Hoteling Guest' dialog box. It has a title bar with 'Edit Hoteling Guest' and standard window controls. The main content area contains a section titled 'Enable Hoteling Guest?' with two radio buttons: 'Yes' (selected) and 'No'. A red arrow points from a callout box 'Select "Yes" to enable the Hoteling Guest or "No" to disable it.' to the 'Yes' radio button. At the bottom right, there are 'Save' and 'Cancel' buttons.

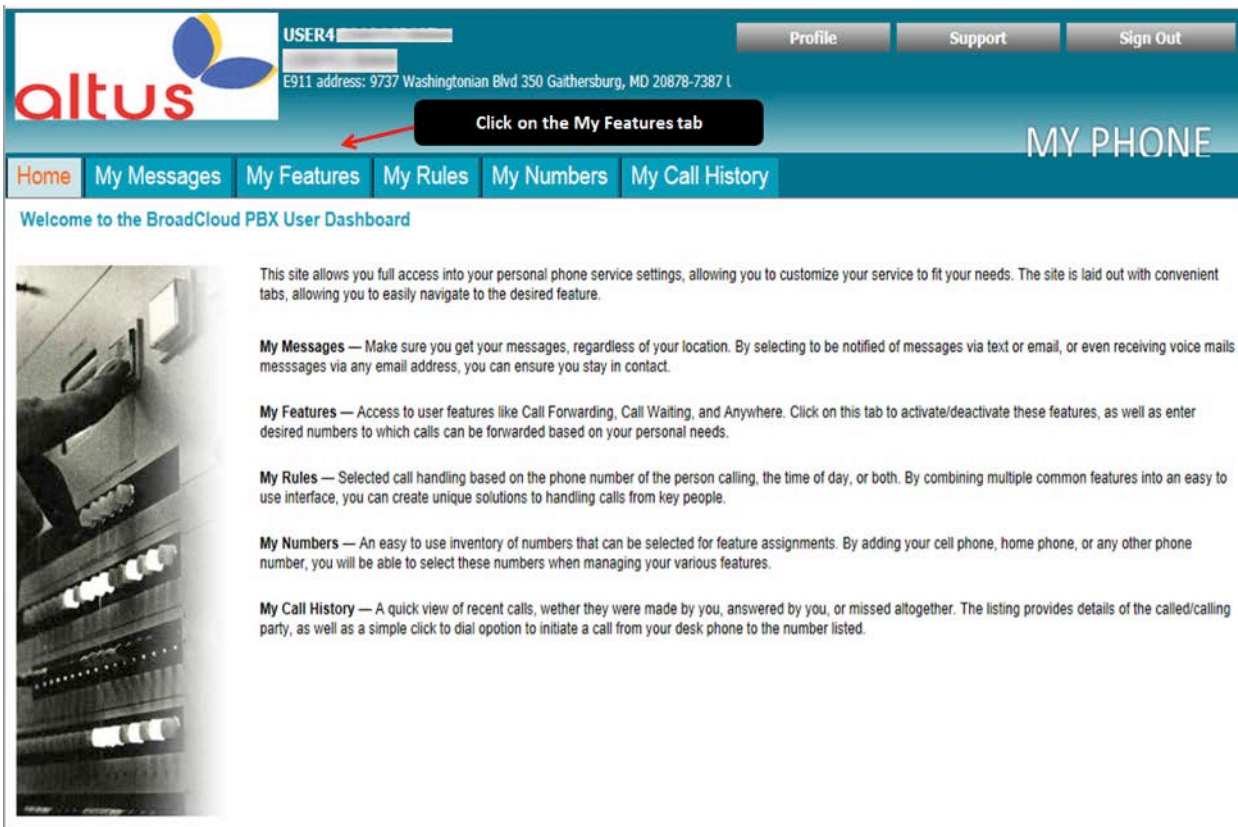
My Phone User Configuration

Guest users may use My Phone to select the Host device.

Step 1. Log in to My Phone



Step 2. Go to the My Features tab



Step 3. Go to the Transportable Profile tab

Home | My Messages | My Features | My Rules | My Numbers | My Call History

Overview
Forward All Calls
Do Not Disturb
Remote Office
Sim Ring/Anywhere
Forward Unanswered Calls
Call Waiting
Business Continuity
Reject Unidentified Callers
Receptionist Soft Console
Call Center
Barge In
Hoteling Guest

✓ This service has been enabled by your site Administrator. Use the buttons below to proceed.

Your profile is currently Transported to host: None [Remove Association](#)

Host Number	Associate to Host
8505559131	<input type="checkbox"/>
8505559138	<input type="checkbox"/>
9185559001	<input type="checkbox"/>

[Get Available Hosts](#) [Refresh](#)

1 Click the "Hoteling Guest" tab

Step 4. Retrieve List of Available Hosts

Home | My Messages | My Features | My Rules | My Numbers | My Call History

Overview
Forward All Calls
Do Not Disturb
Remote Office
Sim Ring/Anywhere
Forward Unanswered Calls
Call Waiting
Business Continuity
Reject Unidentified Callers
Barge In
Hoteling Guest

✓ This service has not been enabled by your site Administrator. Please contact your site administrator.

Your profile is currently Transported to host: None [Remove Association](#)

Host Number	Associate to Host
8505559131	<input type="checkbox"/>
8505559138	<input type="checkbox"/>
9185559001	<input type="checkbox"/>

[Get Available Hosts](#) [Refresh](#)

1 Hit the "Get Available Hosts"

Step 5. Select Host phone to Associate with User's Profile

Home | My Messages | My Features | My Rules | My Numbers | My Call History

Overview
Forward All Calls
Do Not Disturb
Remote Office
Sim Ring/Anywhere
Forward Unanswered Calls
Call Waiting
Business Continuity
Reject Unidentified Callers
Barge In
Hoteling Guest

✓ This service has not been enabled by your site Administrator. Please contact your site administrator.

Your profile is currently Transported to host: None [Remove Association](#)

Host Number	Associate to Host
XXXXXXXXXX@domain.adapt.tech.com	<input type="checkbox"/>
XXXXXXXXXX@domain.adapt.tech.com	<input type="checkbox"/>
XXXXXXXXXX@domain.adapt.tech.com	<input type="checkbox"/>

[Get Available Hosts](#) [Refresh](#)

1 Click "Get Available Hosts"

2 Check the box for the phone to use

Step 6. Remove User's Profile Association with Host phone

Home | My Messages | My Features | My Rules | My Numbers | My Call History

Overview
Forward All Calls
Do Not Disturb
Remote Office
Sim Ring/Anywhere
Forward Unanswered Calls
Call Waiting
Business Continuity
Reject Unidentified Callers
Barge In
Hoteling Guest

✓ This service has not been enabled by your site Administrator. Please contact your site administrator.

Your profile is currently Transported to host: XXXXXXXXXX@domain.adapt.tech.com [Remove Association](#)

Host Number	Associate to Host
XXXXXXXXXX@domain.adapt.tech.com	<input checked="" type="checkbox"/>
XXXXXXXXXX@domain.adapt.tech.com	<input type="checkbox"/>
XXXXXXXXXX@domain.adapt.tech.com	<input type="checkbox"/>

[Get Available Hosts](#) [Refresh](#)

1 Click Remove Association