

## Users Panel

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On the Users screen you will see a search box; this will auto-complete as you type in either the name, extension or department of a user. Click **Add User** to add to the domain



### Creating a New User

When adding a new user enter their first and last name. Create an **extension** keeping in mind that it has to be numeric unless otherwise configured. In the **Email Address(es)** field, enter email address(es) that voice mail notifications should be sent to. If a physical device is to be provisioned to this user then check the box **Add Phone Extension**. When entering a **password** make sure that it is numeric so the user can access their settings on the phone keypad.

## Editing User Profile

From this tab, **Profile** information can be added or modified. **Directory options** determine whether the user will be announced in the dial by name directory or whether user should be listed in the Contacts section of the basic user portal. **Caller ID** can be set to any number; typically, the company's main number. The **area code** is used by the system when processing a local seven-digit call. **Emergency Caller ID** helps to define the location where an ambulance will be sent in case of emergency. These are passed whether an emergency call is being made or not. **Change Password** can be reset if the user has forgotten a password. There is no way of telling what the current password is.

Users / Huck Finn (1011)
↻

Profile
Answering Rules
Voicemail
Phones

**Profile Information**

First Name

Last Name

Login Name

Department  ▼

Timezone  ▼

Email Address(es)  +

Directory Options  Announce in Audio Directory  
 List in Directory

**Caller ID Information**

Area Code

Caller ID

911 Caller ID

**Change Password**

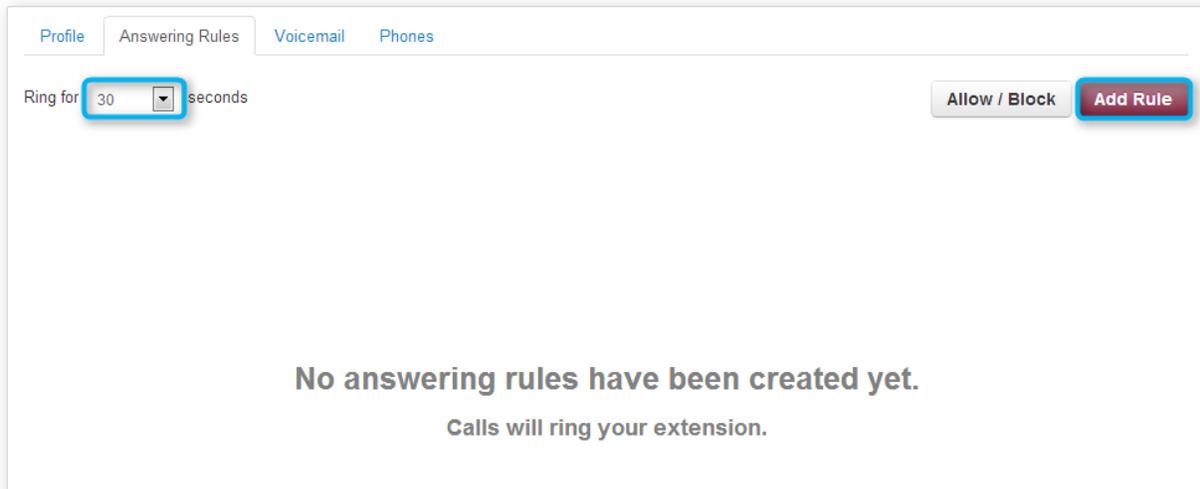
New Password  Note: Password must be numbers only.

Confirm New Password

## Answering Rules

**Answering Rules** combined with [time frames](#) tell the system what do with an incoming call. The default behavior is to ring the user's extension.

**Ring** time out determines how long a call will ring before the answering rule takes over. To add a rule, click on **Add Rule**.



Profile Answering Rules Voicemail Phones

Ring for 30 seconds

Allow / Block Add Rule

**No answering rules have been created yet.**  
Calls will ring your extension.

**Time Frames** determine specific hours of certain days or a span of days the answering rule will be active. For example: Monday-Thursday 5pm-8am, or July 7–July 25. It is a good idea to have one or more time frames ready before creating your answering rules. Give your time frame a name that matches the time frame and usage; e.g., *weekends forward to cell*. If you do not have a time frame created select *default (all the time)* until you create a desired time frame.

### Add an Answering Rule ×

Time Frame  ▼  
 This is when your answering rule will apply

**Enabled**

---

**Do not disturb**

**Call screening**

---

**Call Forwarding**

Always

When busy

When unanswered

When offline

---

**Simultaneous ring**

Include user's extension

Ring all user's phones

Answer confirmation for offnet numbers

+

---

Just ring user's extension

In the example shown above, we can assume the time frame (All the Time) is set to *always* and all of the user phones will ring, including the user's extension. If the extension is not answered, the user's cell phone (858-555-1234) will ring after the time out set on the Answering Rules screen. **Ring all user's phones** will ring all phones in a user's inventory ([phones](#)). If the user has only one phone, this may cause a problem. It would be better to add the cell number in the box next to *sim-ring* as a catch. The example above would most likely be used for a queue wherein the supervisor would want to receive a cell phone call if the queue wasn't handled.

If **Do not disturb** is selected then all calls are routed to the user's voice mail box. For **Call Screening**, the system will ask the caller to record their name and then a call is placed to the user. The user has a choice of answering the call or sending it to voice mail.

For **Call Forwarding** there are a few different options:

- **Always** - if selected this is the ONLY rule that the system will process when the call comes to this user
- **When busy** - if the user's device returns a busy signal then this option will be processed
- **When unanswered** - if the user does not answer the device then this option will be processed
- **When offline** - if the device ever becomes unregistered then this option will be processed

For **Simultaneous Ring** the system can ring all of the user's phones, other user's devices or off-net numbers. In order to add more simultaneous ring locations, click on the green plus sign.

Once the answering rule has been created this is what will be shown on the Answering Rules page. The **Active** label shows the answering rule that is currently in effect.

Time Frame	Description
All the Time <span style="background-color: #0070C0; color: white; padding: 2px;">Active</span>	Simultaneously ring x1011 Forward when unanswered to (858) 555-1234

Upon clicking on the **Allow/Block** button the following box will pop up. Enter numbers you wish to **Allow** and **Block**

### Allow and Block Numbers

**ALLOWED NUMBERS**

Enter a number +

Calls from these numbers are not subject to DND or Call Screening

**BLOCKED NUMBERS**

Enter a number +

Calls from these numbers will be dropped immediately

Block anonymous or unknown

Done

## Voicemail Settings

From this tab various voicemail settings are configured. From here you can enable or disable voicemail at any time. There are various voicemail options with regards to how you hear the messages. There are a couple of ways to clear space in the voicemail inbox; either by deleting all voicemail messages or by clearing the data (voicemail messages, greetings, music on hold and recorded name) in the account altogether. The latter is useful for re-purposing a mailbox for a new user using the same user name.

Profile Answering Rules **Voicemail** Phones

Enable Voicemail

**Inbox**

Options  Sort voicemail inbox by latest first  
 Announce voicemail received time  
 Announce incoming call ID

Number of Messages  **Clear messages** Useful for emptying a mailbox that is too full!

**Data**

Limit   
Used  **Clear data** Useful for creating a clean voicemail box ready for a new person to use!

**Greetings**

Voicemail Greeting

Recorded Name

**Unified Messaging**

Email Notification

**Save** **Cancel**

## Manage Greetings

You can also manage greetings by selecting a new one, confirming that the current selection is correct (by pressing the play button to the right), uploading or recording new ones.

**Manage Greetings** [X]

New Greeting  Upload  
 Record

Greeting Name

**Manage Greetings** [X]

New Greeting  Upload  
 Record

Call me at

Greeting Name

**Unified Messaging** determines the format in which email notifications from voicemail messages will be sent. Options that are sent with a **hyperlink** or **brief hyperlink** format reduce the size of the email message; i.e., The brief format has no branding information on it. There is also an option to keep the message as a new message or to move to saved or trash. For example: A user may want to organize phone messages in a separate desktop application while keeping the new messages file in the portal current.

**Unified Messaging**

Email Notification  [v]

- None
- Send w/ hyperlink
- Send w/ brief hyperlink
- Send w/ attachment (leave as new)
- Send w/ attachment (move to saved)
- Send w/ attachment (move to trash)
- Send w/ brief attachment (leave as new)
- Send w/ brief attachment (move to saved)
- Send w/ brief attachment (move to trash)

### Adding/Editing/Viewing Phones

If a phone extension was created at time of user creation then this can be seen by looking at the **Phones** tab. Information on the device type, MAC address and line to be assigned can be entered by clicking on the device name hyperlink.

Registered	Name	Device Type	IP Address	MAC Address	Line
X	1011	-	-	-	-

From this tab you can also add another phone or device such as an analog telephone adapter (ATA) or softphone.

#### Add a Phone

Phone Name   
Note: Phone Name cannot be changed

Model

MAC Address

Line number on Phone

The devices will be listed as such:

Registered	Name	Device Type	IP Address	MAC Address	Line
X	1011	-	-	-	-
X	1011a	Polycom 670		AB:12:CD:34:EF:56	1

Click on the name to edit or display device attributes.