



Grandstream Networks, Inc.

UCM6xxx Series

User Portal Guide



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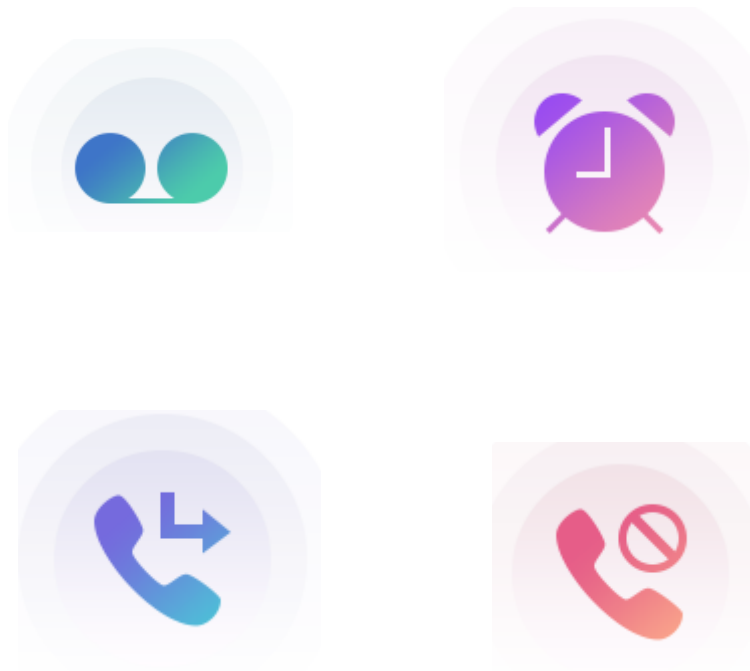


INTRODUCTION

Other than the web interface access for administrators, Grandstream UCM6xxx IP-PBX series offer to each extension a “User Portal” allowing to manage extension own data and information by the user from the web UI with no need of administrator intervention. Using the User Portal will reduce administrator interventions to the system for basic extension operations which will be managed by the extension owner directly.

A user portal account is automatically available upon extension creation and is designed to give access to a variety of features covering user information, extension configuration, CDR (Call Detail Records), and value-added features such as WebRTC, Fax Sending, Call Queue, wakeup Service and CRM (Customer relationship management). These features are categorized into 3 main menus: Basic Information, Personal Data and Value-added Features.

This document introduces the user portal features and offers step by step instructions to use them.



LOGIN TO THE USER PORTAL

After creating an extension, the super Administrator can configure/edit the login credentials for the user portal under UCM6xxx Web GUI → **Maintenance** → **User Management** → **User Information**.

Users will use only their extension number and the password set by the admin to access to the user portal as shown in below figure.

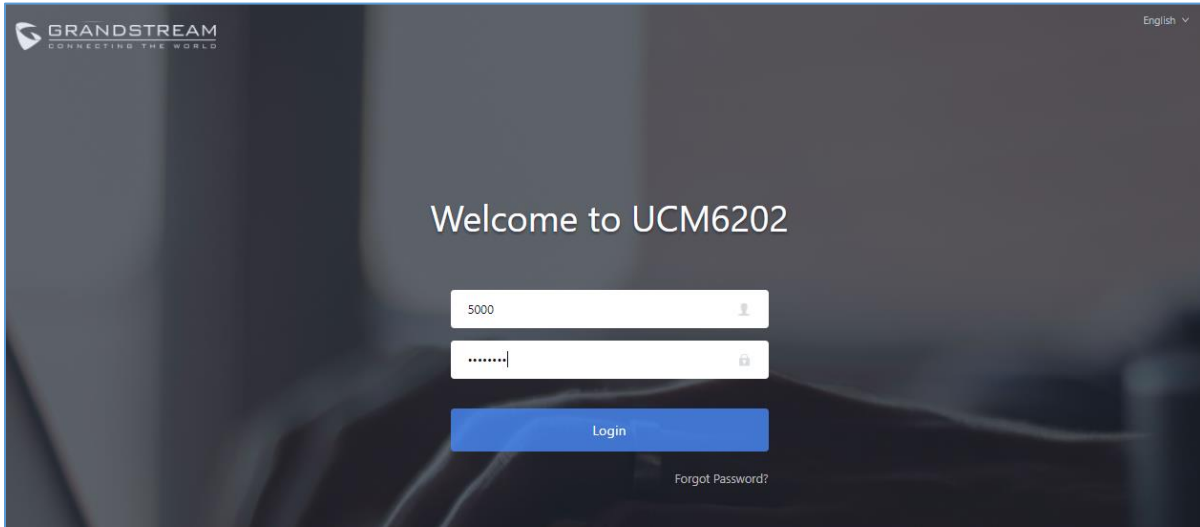


Figure 1: User Portal Login

The UCM6xxx User Portal Web GUI appears once you click “Login”. The following figure shows the user portal interface:

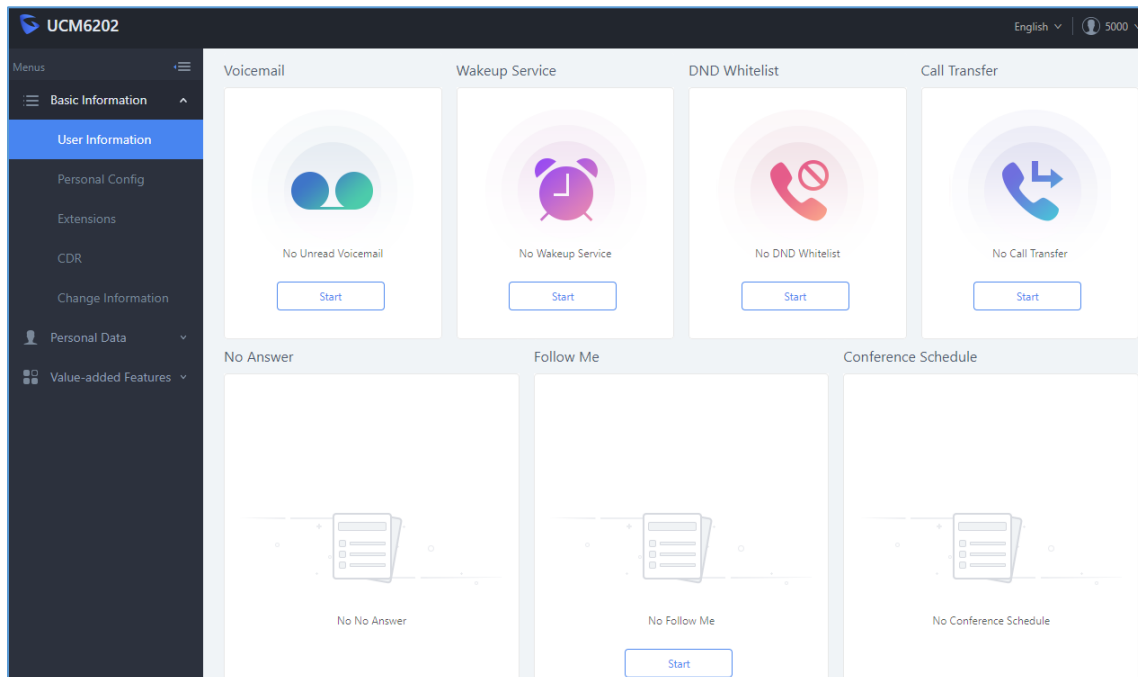


Figure 2: User Portal Layout



BASIC INFORMATION

Basic Information menu includes following sub-menus:

- User Information.
- Personal Config.
- Extensions.
- CDR (Call Detail Records).
- Change Information.

User Information

User Information page displays the extension call features statuses including Voicemail, DND whitelist, Call Transfer, No Answer, Follow Me, and Conference Schedule.

The user can press **Start** button to enable and configure a call feature directly.

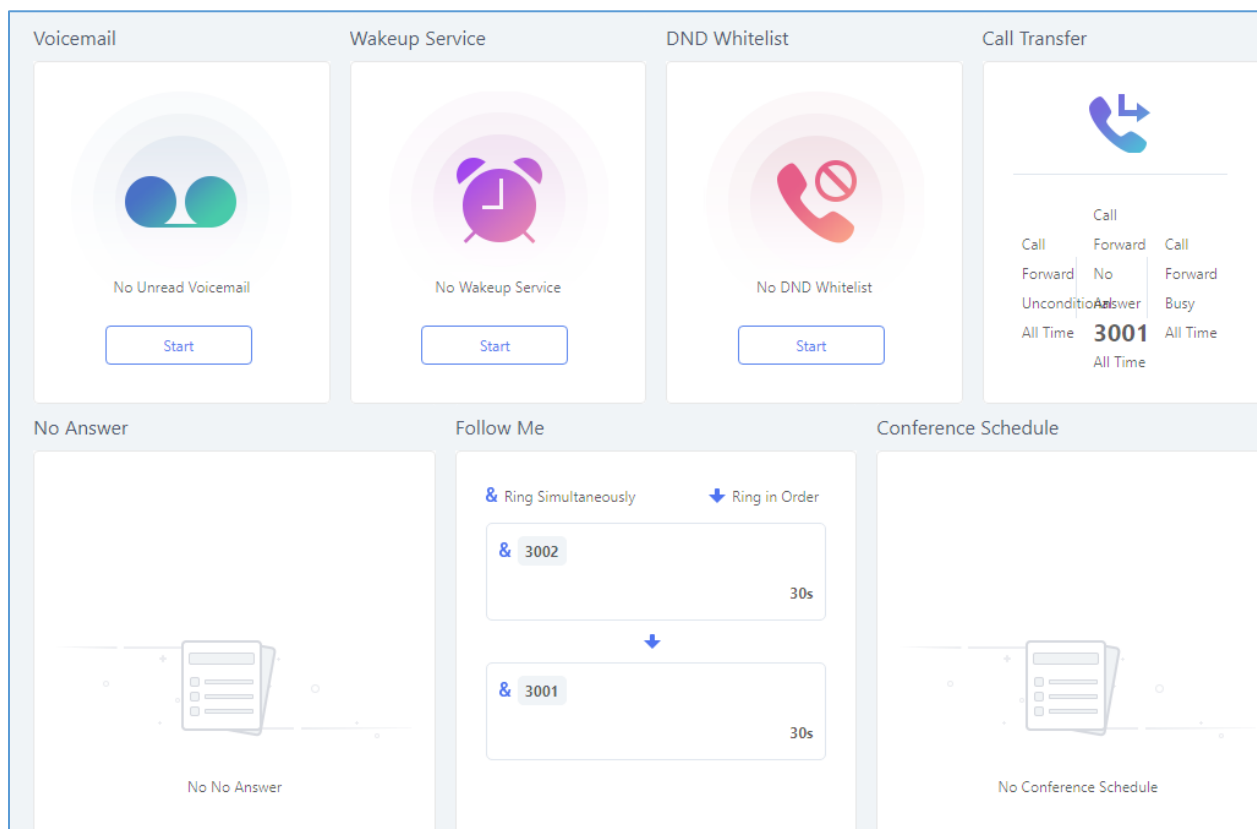


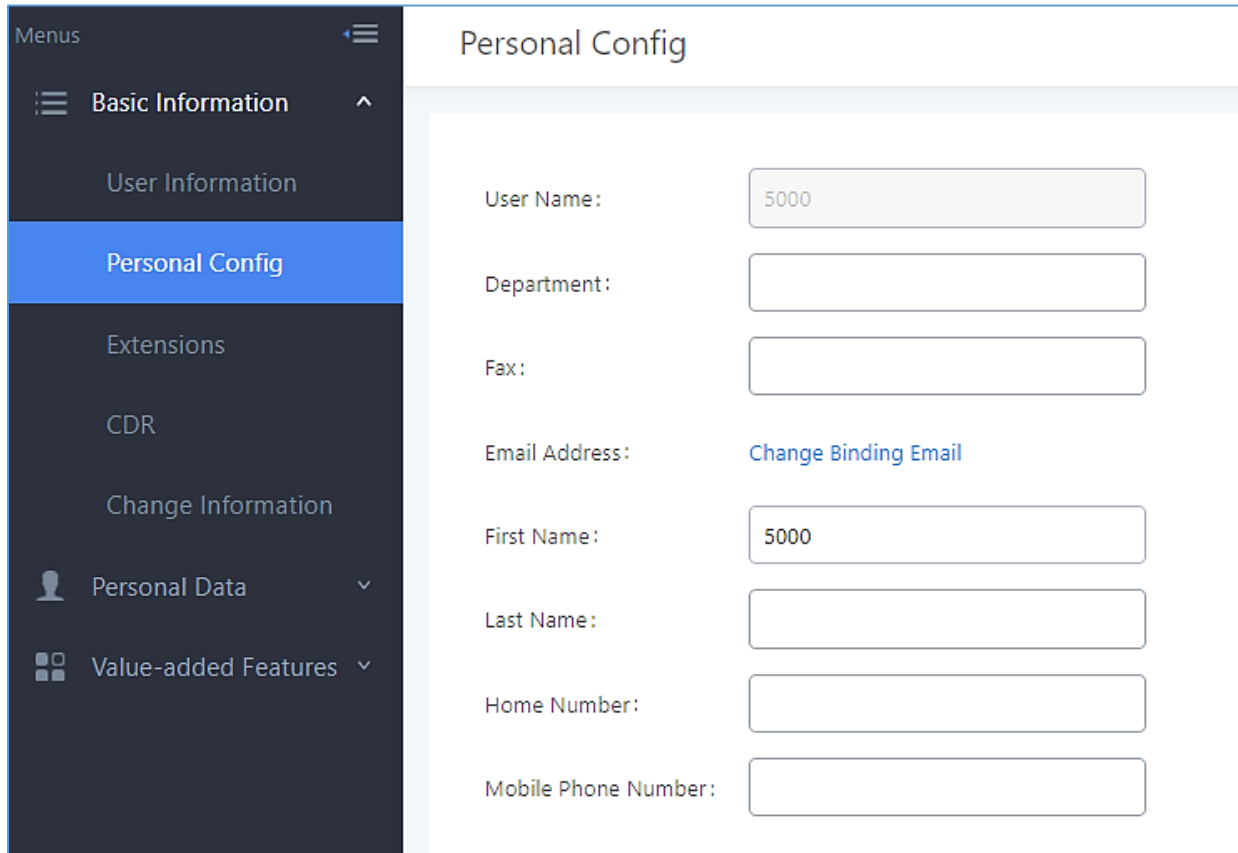
Figure 3: Basic Information → User Information



Personal Config

Personal Config page allows the user to edit his/her personal information including Department, Fax Number, Email Address, First Name, Last Name, Home Number and Mobile Phone Number.

The “User Name” cannot be edited from the User Portal. Only Admin can edit this field if needed.



The screenshot displays the 'Personal Config' page. On the left is a dark sidebar menu with the following items: 'Basic Information' (expanded), 'User Information', 'Personal Config' (highlighted in blue), 'Extensions', 'CDR', 'Change Information', 'Personal Data', and 'Value-added Features'. The main content area is titled 'Personal Config' and contains the following fields:

User Name:	<input type="text" value="5000"/>
Department:	<input type="text"/>
Fax:	<input type="text"/>
Email Address:	Change Binding Email
First Name:	<input type="text" value="5000"/>
Last Name:	<input type="text"/>
Home Number:	<input type="text"/>
Mobile Phone Number:	<input type="text"/>

Figure 4: Basic Information → Personal Config

Extensions

Extension page is divided into 3 tabs as follows:

1. **Basic Settings:** Allows to:
 - Change the SIP Extension Password and Authentication ID.
 - Enable/Disable Voicemail and set the Voicemail Password.
 - Enable/Disable the extension.
 - Select the extension prompts language.



Extension Information

Basic Settings
Features
Specific Time

General

<p>* Extension: <input style="width: 100%;" type="text" value="1000"/></p> <p>AuthID: <input style="width: 100%;" type="text"/></p> <p>* Voicemail Password: <input style="width: 100%;" type="text" value="1802"/></p> <p>Disable This Extension: <input type="checkbox"/></p>	<p>* SIP/IAX Password: <input style="width: 100%;" type="text" value="hY9d6D1vdIBhy4x"/></p> <p>Enable Voicemail: <input checked="" type="checkbox"/></p> <p>Skip Voicemail Password <input type="checkbox"/></p> <p>Verification:</p> <p>* Language: <input style="border: none; border-bottom: 1px solid #ccc; text-decoration: none; padding: 2px 5px; font-family: sans-serif; font-size: 1em; color: #000; background-color: #fff; border-radius: 2px; margin-bottom: 0;" type="text" value="Default"/> v </p>
---	---

Figure 5: Basic Information → Extensions → Basic Settings

2. **Features:** The extension configuration parameters in this menu provide the user with a variety of call features to perform, such as:

- **Presence:** Set up presence status of the extension (6 statuses are available).
- **Call Transfer:** Configure call forward for each presence status. (Call Forward Unconditional, Call Forward No Answer, Call Forward Busy and FWD Whitelist).
- **Do Not Disturb:** Enable/Disable DND feature and configure its conditions including DND Whitelist.
- **Ring Simultaneously:** Enable/Disable “Ring Simultaneously” feature and configure its conditions.
- **Seamless transfer privilege control:** Select the extensions that can perform seamless transfer to the user’s extension.
- **Ring Timeout:** Configure the ring time out parameter for the extension.



Extension Information Save Cancel

Basic Settings **Features** Specific Time

Call Transfer

Presence Status:

Available
 Away
 Chat
 Custom Presence Status
 Unavailable

Call Forward	<input type="text" value="None"/>	CFU Time Condition:	<input type="text" value="All Time"/>
Unconditional:			
Call Forward No Answer:	<input type="text" value="None"/>	CFN Time Condition:	<input type="text" value="All Time"/>
Call Forward Busy:	<input type="text" value="None"/>	CFB Time Condition:	<input type="text" value="All Time"/>

Do Not Disturb: * DND Time Condition:

Figure 6: Basic Information → Extensions → Features

- Specific Time:** User can configure specific time for his extension to use time condition based features.

Extension Information Save Cancel

Basic Settings Features **Specific Time**

Time: -

Frequency: By Week By Day

Sun
 Mon
 Tue
 Wed
 Thu
 Fri
 Sat

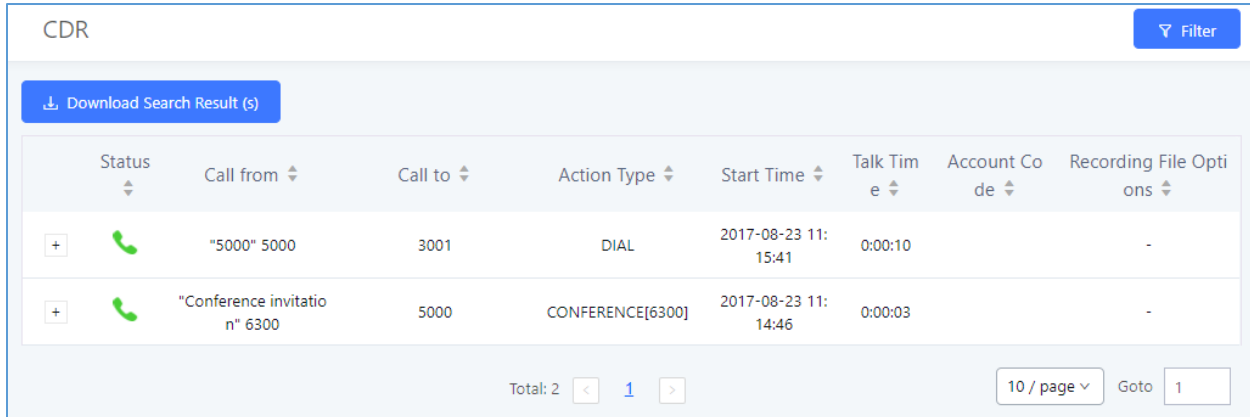
Time	Week	Month	Day	Options
------	------	-------	-----	---------



Figure 7: Basic Information → Extensions → Specific Time



CDR (Call Detail Records)

The CDR page provides to the user all the call records details related to his extension.



Status	Call from	Call to	Action Type	Start Time	Talk Time	Account Code	Recording File Options
+ 	"5000" 5000	3001	DIAL	2017-08-23 11:15:41	0:00:10		-
+ 	"Conference invitation" 6300	5000	CONFERENCE[6300]	2017-08-23 11:14:46	0:00:03		-

Total: 2 < 1 > 10 / page Goto 1

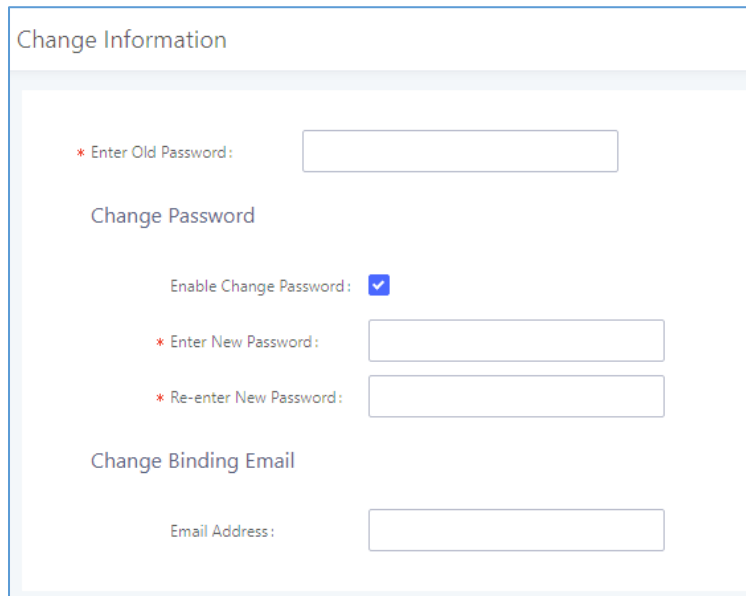
Figure 8: Basic Information → CDR

Notes:

- User can also filter records by: start/end time, Caller Number/Name, Call Number, Action Type, Call Type, and Status. Click on **Filter** button to have the filtering menu and once the criteria are set then click on **Filter** button in order to process the request and get the desired result.
- User can also download all his CDR records in an excel file from the user portal.

Change Information

User can easily change the user portal password by entering the old one already set by the administrator and setting a new one. In addition to this, user Email Address can also be set or modified in this menu.



Change Information

* Enter Old Password:

Change Password

Enable Change Password:

* Enter New Password:

* Re-enter New Password:

Change Binding Email

Email Address:

Figure 9: Basic Information → CDR



PERSONAL DATA

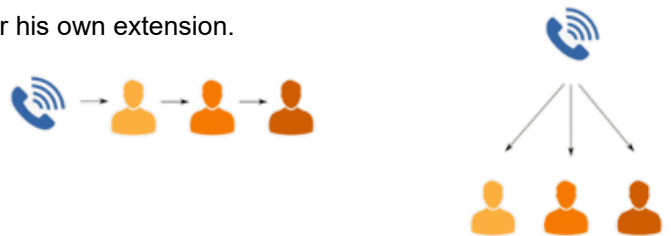
Personal Data menu includes following sub-menus:

- Follow Me.
- Voicemail.
- Recording Files.
- Fax Files.

Follow Me

This page allows the user to configure Follow Me feature for his own extension.

Follow Me is a very useful feature to locate a user by ringing different extensions and external numbers in a pre-defined order. This feature allows users to be reached at numerous devices, such as mobile, home-telephone, office-telephone, or softphones.



Follow Me User Preference
Save

Enable: <input checked="" type="checkbox"/>	Skip Trunk Auth: <input type="checkbox"/>
Music On Hold Class: <input type="text" value="default"/>	Confirm When Answering: <input type="checkbox"/>
Enable Destination: <input checked="" type="checkbox"/>	
* Default Destination: <input type="text" value="Voicemail"/>	<input type="text" value="1000"/>

Follow Me Numbers

New Follow Me Number: Dial Local Extension Dial External Number

for (seconds)

Dialing Order: Ring after trying previous extension/number Ring along with previous extension/number



+ Add

Extension	Options
3002 for 30 (seconds)	
3100 for 30 (seconds)	



Figure 10: Personal Data → Follow Me



VoiceMail

User can view all the voicemails he received under the UCM6xxx portal Web GUI → **Personal Data** → **VoiceMail**. He can download them as well by clicking on , delete them by clicking on  or Mark them as Read by clicking on the **Mark as Read** button.



Voicemail					
Voicemail Prompt		Mark as Read			
<input type="checkbox"/>	Name ↕	CallerID Number ↕	Date ↕	Size ↕	Options
<input type="checkbox"/>	Unread	3000	2017-08-28 11:52:48 UTC-04:00	12.69 KB	 

Total: 1 Goto

Figure 11: Personal Data → VoiceMail

User can also customize his Voicemail greetings messages by uploading a custom prompt for each greeting message. To do so, user needs to click on **Voicemail Prompt** and upload a prompt for each status.

Notes:

- Available greetings are:
 - **Busy**: The corresponding message will be played when the extension is busy.
 - **Unavail**: The corresponding message will be played when the extension is unavailable.
 - **Temp**: Highest priority. If exists, the corresponding message will be played.
 - **Greet**: This is the welcome message played when reaching extension VM.

The priority is “temp > busy/unavail > greet”.

- Sounds file must be PCM encoded, 16 bits at 8000Hz mono with mp3/wav format or raw ulaw/alaw/gsm file with .mp3/.wav/.ulaw/.alaw/.gsm suffix. The file size must be less than 5MB.

Voicemail Prompt Cancel


Voicemail prompt will be played when user enters voicemail. "busy" indicates the extension is busy, "unavail" indicates the extension is unavailable. Priority: temp > busy/unavail > greet
 Sound file must be PCM encoded, 16 bits at 8000Hz mono with mp3/wav format, or raw ulaw/alaw/gsm file with .mp3/.wav/.ulaw/.alaw/.gsm suffix. The file size must be less than 5MB.

Busy:	<input type="button" value="Choose file to upload"/>	<input type="button" value="Download"/>	<input type="button" value="Delete"/>
Greet:	<input type="button" value="Choose file to upload"/>	<input type="button" value="Download"/>	<input type="button" value="Delete"/>
Temp:	<input type="button" value="Choose file to upload"/>	<input type="button" value="Download"/>	<input type="button" value="Delete"/>
Unavail:	<input type="button" value="Choose file to upload"/>	<input type="button" value="Download"/>	<input type="button" value="Delete"/>




Figure 12: Personal Data → VoiceMail – Voicemail Prompt





Recording Files

From this menu, the user can find all the Extension Call Recordings under the UCM6xxx portal Web GUI → **Personal Data** → **Recording Files**, with the possibility of playing them on the user portal interface by clicking  button or download them to his personal computer.





Recording Files					
Caller	Callee	Call Time	Size	Options	
5000	3001	2017-08-24 04:21:32 UTC-04:00	194.42 KB		 

 1 





10 / page ▾



Figure 13: Personal Data → Recording Files

Fax Files

User can view all the faxes he received under the UCM6xxx portal Web GUI → **Personal Data** → **Fax Files**. He also can download the files by clicking on , or delete them with the button .



Fax Files					
<input type="checkbox"/>	Name ↕	Date ↕	Size ↕	Options	
<input type="checkbox"/>	VFAX-5000-20170828-110103-1503932444.50.pdf	2017-08-28 11:01:25 UTC-04:00	1573		
<input type="checkbox"/>	VFAX-5000-20170828-110103-1503932444.50.tiff	2017-08-28 11:01:20 UTC-04:00	5871		

Total: 2  1 

10 / page ▾ Goto 1

Figure 14: Personal Data → Fax Files

Note: Two copies of each fax file are available, one in .pdf format and a second in .tiff format.



VALUE-ADDED FEATURES

Value-added Features menu includes following sub-menus:

- WebRTC
- Fax Sending.
- Call Queue.
- Wakeup Service.
- CRM User Settings.

WebRTC

User portal provides the use of WebRTC for real-Time Audio/Video communication through HTTP/HTTPS and using only the browser.

Extension registration for WebRTC is mandatory and it can be done under Value-added Features→WebRTC. See figure 15.

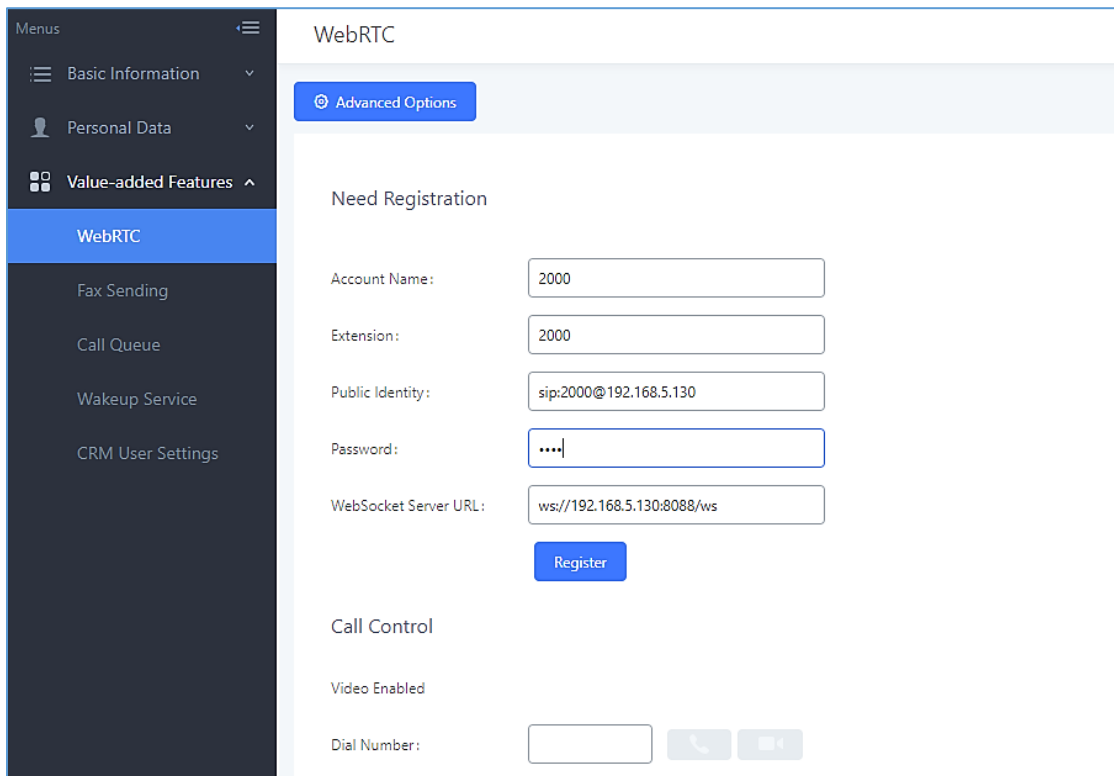


Figure 15: Value-added Features → WebRTC

Once registration is done, users can dial number under “Call Control” and choose if the call will be an Audio or a Video Call.

Advanced options of WebRTC contains more features and more options the user needs to set. Please, see Table 1.



Table 1: WebRTC Advanced Options

Disable Video	Enable/Disable video calls.
Enable RTCWeb Breaker	The RTCWeb Breaker is used to enable audio and video transcoding when the endpoints do not support the same codecs, or the remote server is not RTCWeb-Compliant.
SIP Outbound Proxy URL	The SIP outbound Proxy URL is used to set the destination IP address and Port to use for all outgoing requests regardless of the domain name (a.k.a realm). Note: This is a good option for developers using a SIP domain name without valid DNS A/NAPTR/SRV records.
STUN Server	Address of the STUN server to query. Valid format: [(hostname IP-address) [: port]]. The default port number is the standard STUN port 3478. If not configured, STUN Monitor will be closed.
TURN Server	Configures the TURN Server URI.
TURN Server User Name	Configures the TURN User Name.
TURN Server Password	Configures the TURN Password.
Max bandwidth (kbps)	Defines the maximum audio and video bandwidth to use. This will change the outgoing SDP to include a "b: AS =" attribute. Use 0 to let the browser negotiate the proper value using RTCP-REMB and congestion control
Video size	Defines the maximum and minimum video size to be used. All values are optional. The browser will try to find the best video size between max value and min value based on the camera's capabilities. Example: { minWidth: 480, minHeight:480, maxWidth: 640, maxHeight:640 }. The "{" and "}" around the values are required.
Disable 3GPP Early IMS	Enable or disable 3GPP Early IMS as TR 33.978. This option should not be checked unless you're using a real IMS/LTE network. Note: If earlyIMS is disabled, authentication will be done according to 3GPP TS 24.229 - 5.1.1.2.2.
Disable debug messages	Check to disable debug messages. SIPML5 supports 4 types of debug levels: INFO, WARN, ERROR and FATAL. Default level is INFO. Check this option to set the level value to ERROR
Cache the media stream	Check to disable debug messages. SIPML5 supports 4 types of debug levels: INFO, WARN, ERROR and FATAL. Default level is INFO. Check this option to set the level value to ERROR

Fax Sending

This page provides ability to send PDF or TIF/TIFF fax files to external fax destination.

The steps below describe the basic configuration required to send a fax to an external fax number:

1. Go to UCM6xx User Portal GUI → **Value-added Features** → **Fax Sending**.
2. Enter the destination "External Fax Number".
3. Click on "Choose file to upload" and Select the file you want to send.



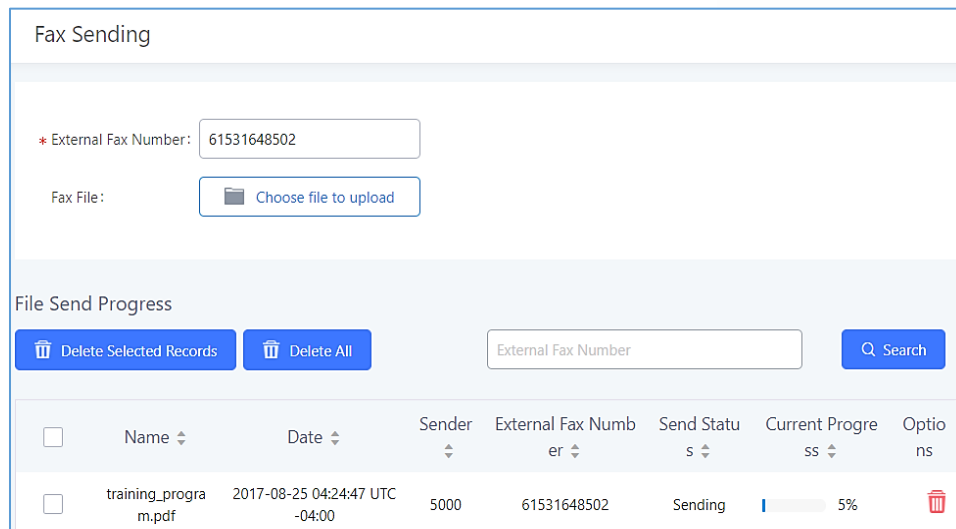


Figure 16: Value-added Features → Fax Sending

Notes:

- Only PDF or TIF/TIFF files are accepted.
- The “File Send Progress” field shows all the information about the faxes that have been sent and gives to the user an idea about the percentage of the fax current progress.

Call Queue

As member of a call queue, the user can manage his calls from the user portal. The page also provides a user dashboard displaying waiting calls and call statistics.

The following figure shows the Switchboard seen by the user 5000 who is a queue agent and can see only his own information under the user portal.

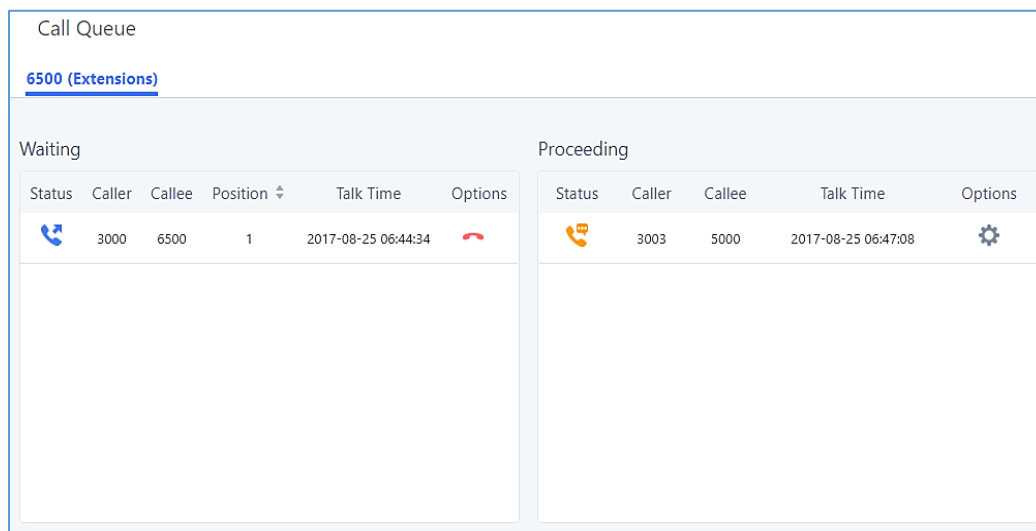




Figure 17: Value-added Features → Call Queue



Waiting	This menu shows the current waiting calls along with the caller id and the option to hang-up call by pressing on the  button.
Proceeding	Shows the current established calls along with the caller id and the callee (agent) as well as the option to hang-up or to transfer the call using the  button.
Agents	Displays the agent extension status (idle, ringing, in use or unavailable) along with some basic call statistics and agent's type (static or dynamic).

Wakeup Service

User can schedule a reminder or wake up calls to its extension using the UCM6xxx user portal.



Please refer to the following steps:

1. Login to the user portal on the UCM6.
2. WakeUp service can be found under **“Value-added Features → Wakeup Service”**, click on [+ Create New Wakeup Service](#) to create a new wakeup service.
3. Configures the Name, Prompt, Date and Time for the user to make the wakeup to.
4. Click [Save](#) and [Apply Changes](#) to apply the changes.

Create New Wakeup Service
Save

Enable Wakeup

Service:

* Name:

* Extension:

Prompt:

Custom Date:

* Date:

* Time:

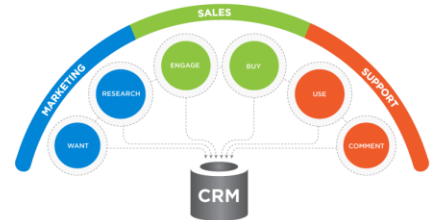
Figure 18: Value-added Features → Wakeup Service

Table 2: Wakeup Service Parameters

Enable Wakeup Service	Enable Wakeup service.
Name	Enter a name to identify the wakeup service.
Prompt	Select the prompt to play for that extension.
Custom Date	If disabled, users can select a specific date and time. If enabled users can select multiple days of the week to perform the wakeup.
Date	Select the date or dates when to performs the wakeup call.
Time	Select the time when to play the wakeup call.
Members	Select the members involved within the wakeup group.

CRM User Settings

User can start using CRM feature once settings on admin access are configured with supported CRM platforms (currently only SugarCRM and Salesforce are supported).



Refer to the following steps to Login to CRM account:

1. Navigate under UCM6xxx portal GUI → **Added-Value Features** → **CRM User Settings**
2. Click on Enable CRM.
3. Enter the Username associated with CRM Account.
4. Enter the Password associated with CRM Account.
5. Click on “Save” and “Apply Changes”.

CRM User Settings

Enable CRM:

* Username:

* Password:

Login Status:

Figure 19: Value-added Features → CRM User Settings

The status will change from “Logged Out” to “Logged In” and the user can start then using CRM features.