

Training onSwitch V7

# PORTAL USER INTERFACE UI & USER ACCOUNT

Classification: For Internal Use  
Status: Released  
Version: E1.2  
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# INTRODUCTION & MOTIVATION

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This training covers the topics:

- ▶ Basic information about the Web based Portal UI
- ▶ User access and access rights to OrgUnits

After this training, the trainee is enabled:

- ▶ To understand the Portal UI concepts
- ▶ To understand the user account and its access rights



*IT'S NOT  
MAGIC  
IT'S "KNOW  
HOW"*

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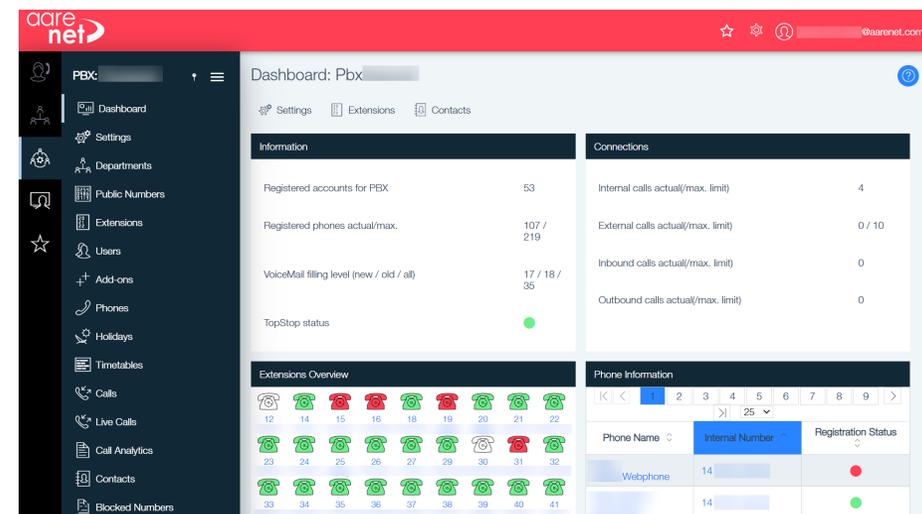
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# 1 INTRODUCTION WEB BASED PORTAL USER INTERFACE

# OVERVIEW PORTAL UI

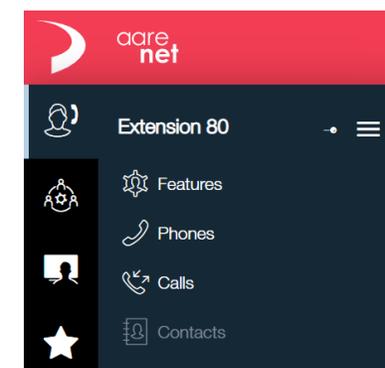
- ▶ The anSwitch V7 UI is called **Portal UI**
- ▶ The **Portal UI** is just **ONE** GUI with:
  - ▶ A consistent look and feel for all user roles and configurations
  - ▶ Automatic adaptation to the screen size
  - ▶ Possible customer customization
- ▶ The Portal UI is easy to handle:
  - ▶ All roles have the same appearance
  - ▶ Depending on the roles the user has access to different configurations
  - ▶ Even advanced features are easy to handle



- ▶ View role "PBX Administrator"



- ▶ View role "PBX Member"



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# 2 PORTAL UI LOGIN / LOGOUT

# PORTAL UI LOGIN

- ▶ Access to the Portal UI have users with an account:

- ▶ Username:

The username is based on an email address. Therefore, a user's email address is mandatory.

## Note

The email address of the username must be **unique** for the whole anSwitch V7! This is due to the password recovery, where a recovery link is sent to this email address.

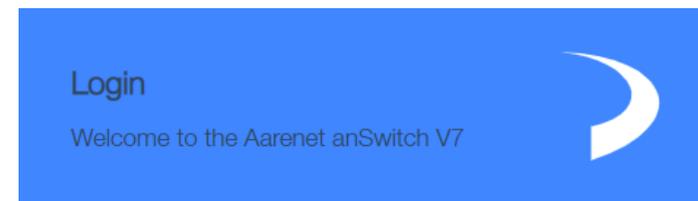
- ▶ Password recovery or no password received:

If a user lost password or did not receive the password, then the user can start the password recovery process:

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> Click link: Password forgotten?

→ The needed information will be sent to the email address of the username.



Username

john.deer@yupi.com

Password

.....



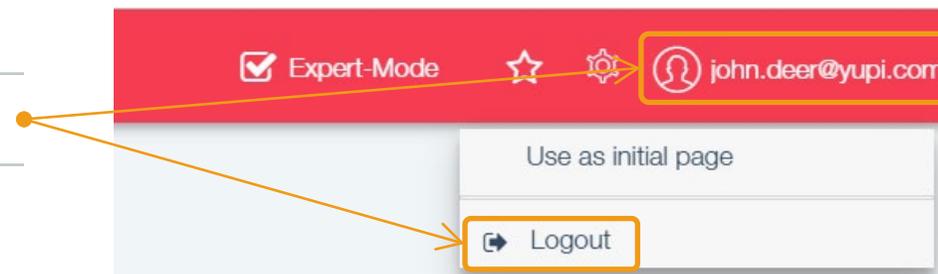
Login

Password forgotten?

# PORTAL UI LOGOUT

## ▶ A logged in user can properly logout:

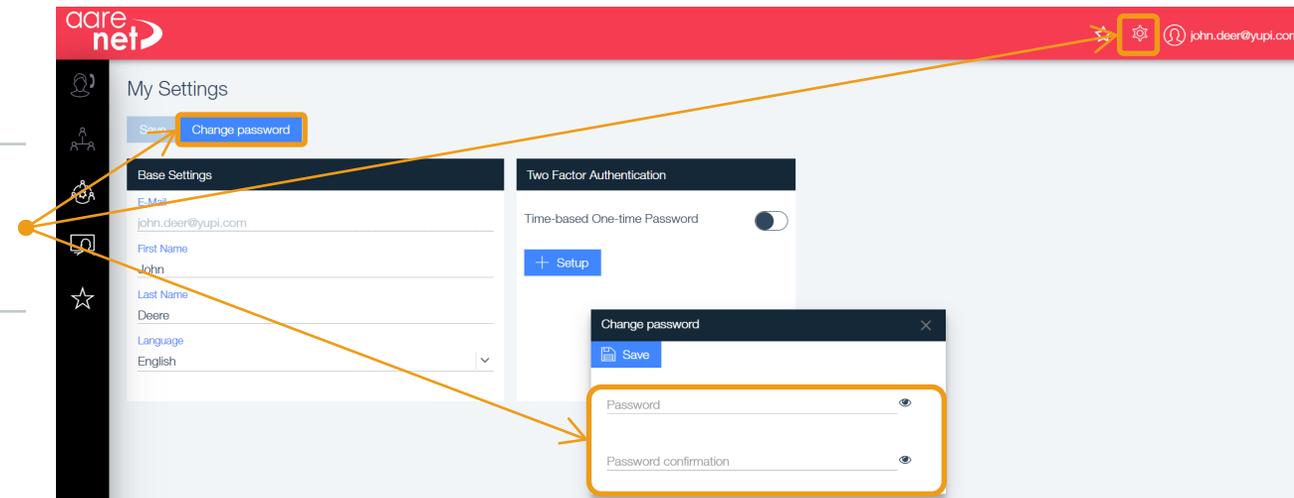
- > Click icon: 
- > Click button: Logout



# PORTAL UI CHANGING THE OWN LOGIN & ACCOUNT SETTINGS

## ▶ A logged in user can change its login credentials:

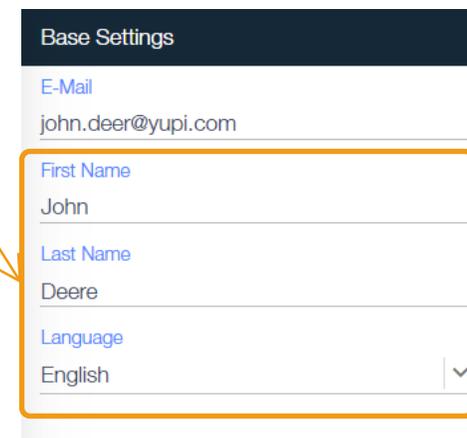
- > Click icon : 
- > Click button: Change password
- > Configure your changes
- > Make valid by click button: 



## ▶ Change user account settings and Portal UI language.

### Note

The parameter "E-Mail" is the username!  
The username is not changeable after the initial creation of its user account.



# AUTOMATIC PORTAL UI LOGIN WITH TOKEN

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- ▶ Upon a user login the Portal UI issues a unique login token to the used web browser.
  - ▶ This unique login token is stored in the web browser and is bound to it.
  - ▶ When the web browser reconnects to the Portal UI, the login token is used for authentication automatically and the session is re-established.
  
- ▶ This has the following convenience for the user:
  - a. The user can just close the web browser where the session with the Portal UI is running (without logout).
  - b. The next time the user starts a session with the Portal UI from the same web browser the user is logged in automatically.

## Note

The unique login token will be revoked when:

- ▶ The user carries out a logout.
- ▶ Automatically after some time (default: 1 week) when no user activities via the associated web session where registered.

The user must execute a normal login the next time.

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# 3 LOGIN WITH TWO- FACTOR AUTHENTICATION

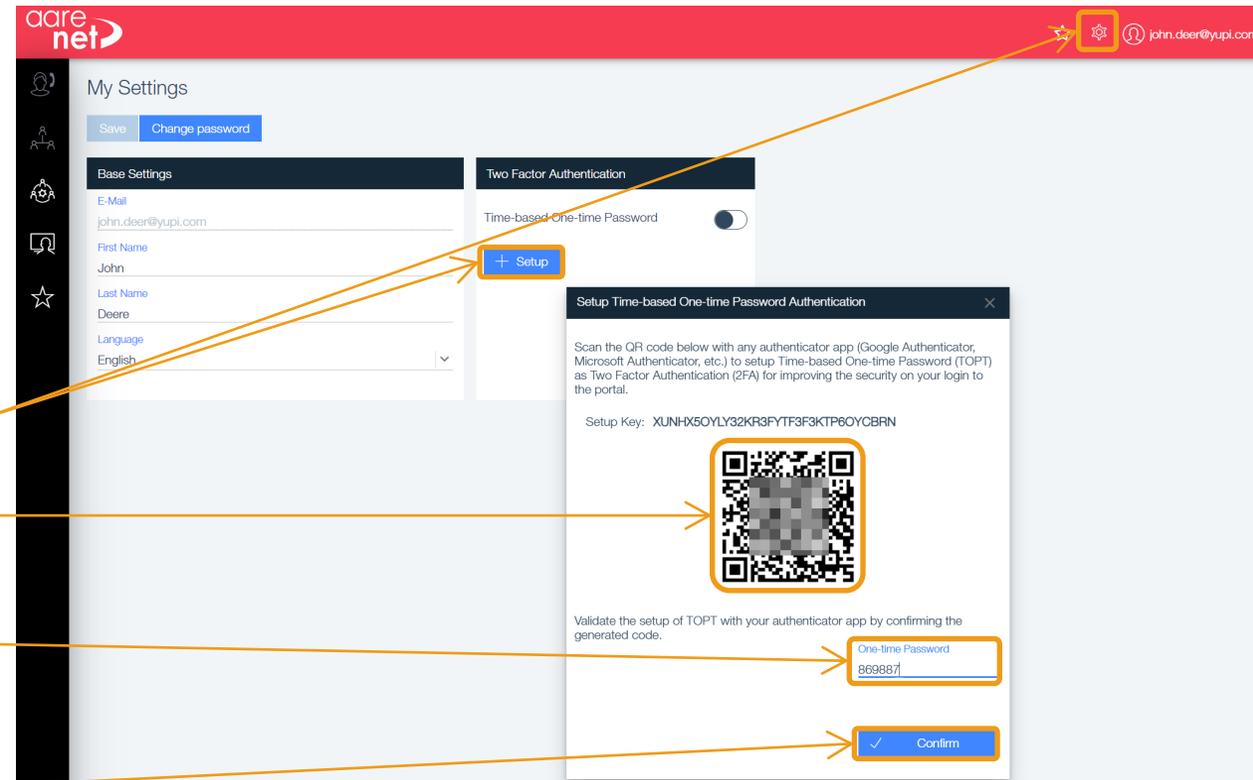
## OVERVIEW TWO-FACTOR AUTHENTICATION

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- ▶ The user login to the Portal UI can be secured with two-factor authentication.
- ▶ The Portal UI two-factor authentication works with TOTP compatible two-factor authentication applications.  
For example:
  - ▶ Microsoft Authenticator
  - ▶ Google Authenticator
  - ▶ etc.
- ▶ Two-factor authentication (TOTP) significantly helps reduce the probability of unauthorized access to the Portal UI.

# ACTIVATING THE TWO-FACTOR AUTHENTICATION

1. Make sure that the TOTP compatible two-factor authentication application is installed and ready for use.
2. Login as the owner of the user account.
  - a. Activate two-factor authentication:
    - > Click icon : 
    - > Click button: + Setup
  - b. Scan with your TOTP application the QR-code.
  - c. Insert the code delivered by the TOTP application.
    - > Click button: Confirm



The screenshot shows the 'My Settings' page with the 'Two Factor Authentication' section. The 'Time-based One-time Password' toggle is turned on. A '+ Setup' button is highlighted. A modal window titled 'Setup Time-based One-time Password Authentication' is open, displaying a QR code and a 'Setup Key: XUNHX5OYLY32KR3FYTF3KTP6OYCBRN'. Below the QR code, there is a text input field for the 'One-time Password' containing the code '869887', and a 'Confirm' button.

# LOGIN WITH TWO-FACTOR AUTHENTICATION

- ▶ Make sure that the TOTP compatible two-factor authentication application is started and ready for use.

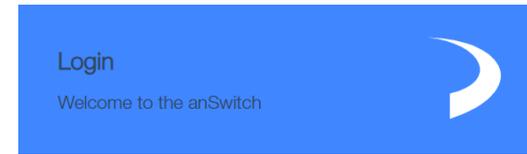
a. Access to the Portal UI and login with your login credentials:

> Click button: Login

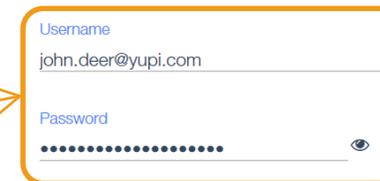
b. The two-factor authentication dialog opens

c. Insert the code delivered by the TOTP application.

> Click button: Confirm



Login  
Welcome to the anSwitch

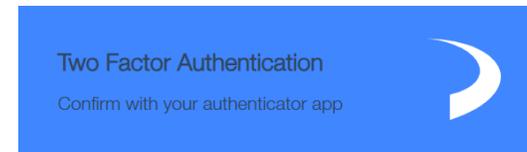


Username  
john.deer@yupi.com

Password  
.....

Login

[Password forgotten?](#)



Two Factor Authentication  
Confirm with your authenticator app



One-time Password  
163950

Confirm

[Logout?](#)

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# 4 NEW INSTANCES WITH PORTAL UI WIZARDS & MANAGING INSTANCES

# PORTAL UI INITIAL CREATION OF INSTANCES

- ▶ The initial creation of the following objects is started from their respective lists:
  - ▶ PBXs
  - ▶ PBX Departments
  - ▶ PBX Extensions
  - ▶ Users
- ▶ The creation process is led by a wizard
  - > In the list header click button: + New
- ▶ The initial configuration is led by a wizard like process
  - > Navigate within the wizard dialog with the buttons: [**>** next] and [**<** back]
- ▶ By clicking the button [ Save ] the instance and its configuration becomes active immediately.

PBX List

**+ New** **×** Delete

<input type="checkbox"/>	Name	Description	Member of	E-Mail
<input type="checkbox"/>	Duck Town	anConnect Sandbox for the Trainee	Provider A	ohara@ducktown.com
<input type="checkbox"/>	PA-PBX-0AX89001	Yupi Inc, Honolulu, 0987654300 – 49, 0800654310 0800654340	Provider A	john.deer@yupi.com

Department Settings

Save Send < back **> next**

Department

Name

Support Department

Description

Support Department

Department Settings

Save Send < back > next

Department Administrator

E-Mail

chief-supp@yupi.com

First Name

Chief

Last Name

Support

Language

English

# MANAGING INSTANCES

- ▶ After the intimal creation of an instance begin the checking or re-configuration by clicking on the row of the instance.

PBX List

	Name	Description	Member of	E-Mail
<input type="checkbox"/>	Duck Town	anConnect Sandbox for the Trainee	Provider A	ohara@ducktown.com
<input type="checkbox"/>	PA-PBX-0AX89001	Yupi Inc, Honolulu, 0987654300 – 49, 0800654310 0800654340	Provider A	john.deer@yupi.com

- ▶ For deleting an instance

- > Select the instance which shall be deleted
- > Click the button: X Delete

PBX List

	Name	Description	Member of	E-Mail
<input type="checkbox"/>	Duck Town	anConnect Sandbox for the Trainee	Provider A	ohara@ducktown.com
<input checked="" type="checkbox"/>	PA-PBX-0AX89001	Yupi Inc, Honolulu, 0987654300 – 49, 0800654310 0800654340	Provider A	john.deer@yupi.com

**Warning**

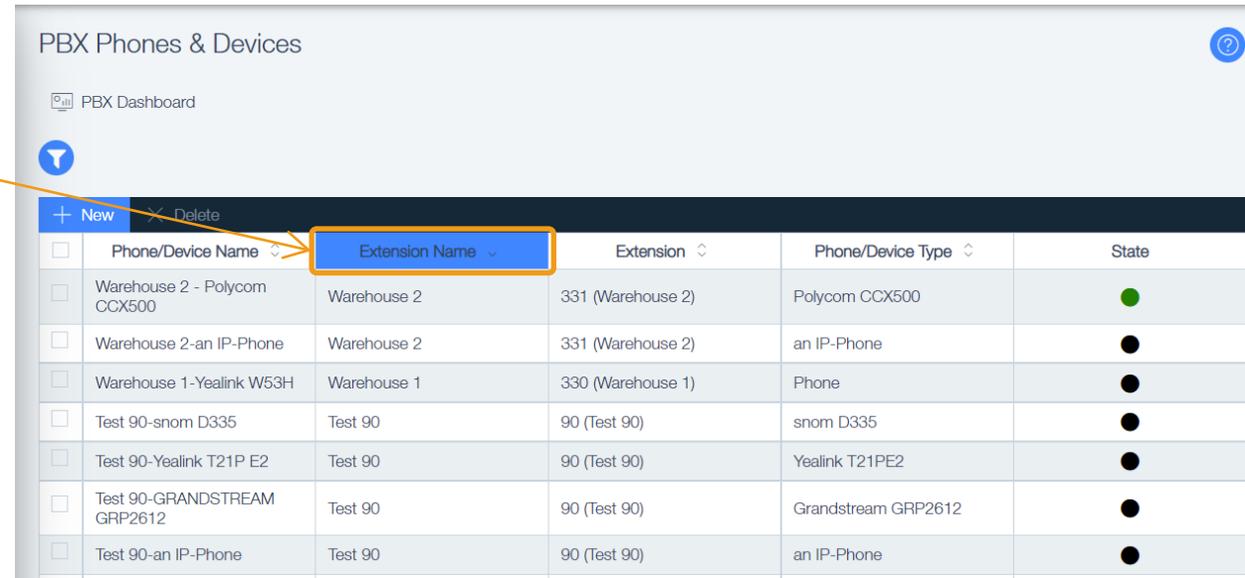
**The Portal UI has no "Undo"!  
→ Deleted instances are deleted ...**

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# 5 SORTING & FILTERS IN THE PORTAL UI

# SORTING OF LISTS IN THE PORTAL UI

- ▶ The lists of instances can be sorted by the desired column header
  - > Click the header name of a column
- ▶ For deleting a sorting reload the page



PBX Phones & Devices

PBX Dashboard

	Phone/Device Name	Extension Name	Extension	Phone/Device Type	State
<input type="checkbox"/>	Warehouse 2 - Polycom CCX500	Warehouse 2	331 (Warehouse 2)	Polycom CCX500	<span style="color: green;">●</span>
<input type="checkbox"/>	Warehouse 2-an IP-Phone	Warehouse 2	331 (Warehouse 2)	an IP-Phone	<span style="color: black;">●</span>
<input type="checkbox"/>	Warehouse 1-Yealink W53H	Warehouse 1	330 (Warehouse 1)	Phone	<span style="color: black;">●</span>
<input type="checkbox"/>	Test 90-snom D335	Test 90	90 (Test 90)	snom D335	<span style="color: black;">●</span>
<input type="checkbox"/>	Test 90-Yealink T21P E2	Test 90	90 (Test 90)	Yealink T21PE2	<span style="color: black;">●</span>
<input type="checkbox"/>	Test 90-GRANDSTREAM GRP2612	Test 90	90 (Test 90)	Grandstream GRP2612	<span style="color: black;">●</span>
<input type="checkbox"/>	Test 90-an IP-Phone	Test 90	90 (Test 90)	an IP-Phone	<span style="color: black;">●</span>

# FILTERING IN LISTS OF THE PORTAL UI

- ▶ For searching an instance or instances in a list, it can be filtered by the offered criteria.

- ▶ Write just parts of the criteria → all matching instances are filtered.

> Click the button:

- > At the desired criterion: Write the criteria
- > Click button: Apply

PBX Phones & Devices

PBX Dashboard

Phone/Device Name: bo    Extension Name:    Extension:    State:

<input type="checkbox"/>	Phone/Device Name	Extension Name	Extension	Phone/Device Type	State
<input type="checkbox"/>	Agent 1-snom D735	Agent 1	21 (Agent 1)	snom D735	
<input type="checkbox"/>	Agent 2-snom D785	Agent 2	22 (Agent 2)	snom D785	
<input type="checkbox"/>	Boss - an IP-Phone Desktop	Boss	300 (Boss)	an IP-Phone desktop	
<input type="checkbox"/>	Boss Office - GRANDSTREAM GRP2613	Boss	300 (Boss)	Grandstream GRP2613	
<input type="checkbox"/>	Boss Office -Yealink T21P E2	Boss	300 (Boss), 311 (Front Desk)	Yealink T21PE2	
<input type="checkbox"/>	Boss-an IP-Phone	Boss	300 (Boss)	an IP-Phone	

- ▶ Several criteria can be involved in the filtering

Extension: 31  Phone/Device Name: bo

<input type="checkbox"/>	Phone/Device Name	Extension Name	Extension	Phone/Device Type	State
<input type="checkbox"/>	Boss Office -Yealink T21P E2	Boss	300 (Boss), 311 (Front Desk)	Yealink T21PE2	

- ▶ Delete filters by clicking the

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# 6 PORTAL UI FILTERING SELECTIONS

# PORTAL UI FILTERING SELECTIONS

- ▶ In several configuration situations the Portal UI provides filtering selections for a configuration where a pure pull-down menu would be too big or uncomfortable to handle.
- ▶ Filter selections are used in situations where the pull-down menu is dynamically assembled and can contain an unlimited number of possible configuration choices.
- ▶ A filtering selection offers:
  - ▶ To search with a filter criterion and thus reduce the displayed choices.
  - ▶ Selecting the configuration value
  - ▶ Optional display of information that help to identify the source of a configuration choice.

Filter selection.

- ▶ With the possibility to enter a filter criterion
- ▶ A pull down-menu with a max. of 5 choices.

Result of the current filtering with the possibility for selecting the configuration value.

Icon	Number	Name	Category
0			
👤	300	Boss	Extension
👤	330	Warehouse 1	Extension
🗨️	40	Support IVR	IVR
📞	0041319802811	Aarenet Front Desk	Contact

Indication that there are more choices.

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# 7 PORTAL UI INLINE- HELP

# PORTAL UI INLINE-HELP

- ▶ On the Portal UI pages an Inline-Help may be available. It provides in a breve description what can be done on the displayed page.

> Click the button for displaying or remove: 

## PBX Phones & Devices ? Help for Phones & Devices

PBX Dashboard

	+ New	×	Delete		
<input type="checkbox"/>	Phone/Device Name	Extension Name	Extension	Phone/Device Type	State
<input type="checkbox"/>	Agent 1-snom D735	Agent 1	21 (Agent 1)	snom D735	●
<input type="checkbox"/>	Agent 2-snom D785	Agent 2	22 (Agent 2)	snom D785	●
<input type="checkbox"/>	Boss - an IP-Phone Desktop	Boss	300 (Boss)	an IP-Phone desktop	●
<input type="checkbox"/>	Boss Office - GRANDSTREAM GRP2613	Boss	300 (Boss)	Grandstream GRP2613	●
<input type="checkbox"/>	Boss Office - Yealink T21P E2	Boss	300 (Boss), 311 (Front Desk)	Yealink T21PE2	●
<input type="checkbox"/>	Boss-an IP-Phone	Boss	300 (Boss)	an IP-Phone	●

What can you do here?

Here you have a list of all phones and devices that have been created and some information about them:

- ▶ "Phone/Device Name"
- ▶ "Extension Name"
- ▶ "Extension" with number and name
- ▶ "Phone/Device Type"
- ▶ "State"

- The phone has correctly registered (logged on) to the PBX and can make incoming and outgoing calls.
- The phone was registered but has not re-registered again. The phone cannot receive calls!
- The phone was created but has **never** registered.

Clicking on a phone will take you to the configuration of the phone related features.

Connecting Special Devices to a PBX

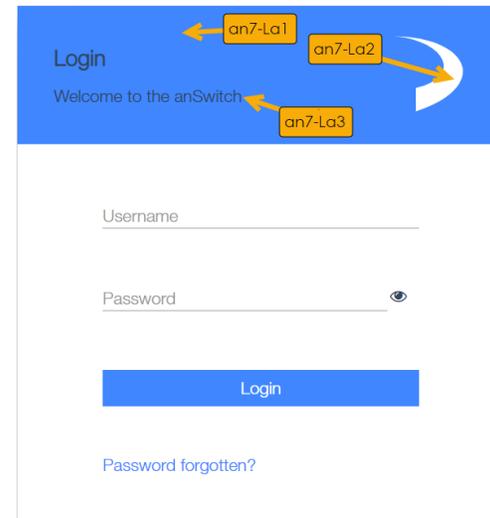
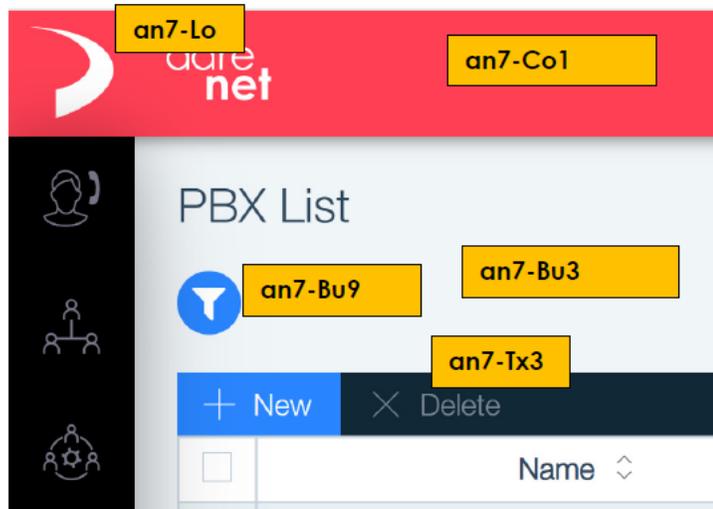
On the PBX phone list page, you as PBX administrator have the option to connect a DECT system to your PBX.

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# 8 PORTAL UI CUSTOMER CUSTOMIZATION

# OVERVIEW PORTAL UI CUSTOMER CUSTOMIZATION

- ▶ When a customer desires to customize the anSwitch V7 Portal with own colors and logo then this is possible to a certain extent.



- ▶ The Portal UI and landing page customization is possible on level:
  - ▶ System
  - ▶ Tenant
  - ▶ PBX

## PORTAL UI CUSTOMER CUSTOMIZATION PROJECT

- ▶ This feature requires specific configurations on the system and may incur a project or license fee. Please ask your Aarenet account manager for details.
- ▶ Following table shows the different steps and the owner responsible to deliver the information:

Process Step	Aarenet	Customer
Explain customization step	X	
Prepare customization files		X
Prepare customization into system	X	
Test of customization on staging system (if available) or on system under deployment		X
Release customization	X	

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# 9 USER ACCESS & USER ROLES

## OVERVIEW USER ACCESS & USER ACCOUNT

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- ▶ A user needs a user account when:
  - ▶ The user needs access to the Portal UI for configuring.
  - ▶ The user needs anConnect activated for its extension.
  - ▶ The user needs to receive new messages from its VoiceMail Box (answering machine) by e-mail.
- ▶ To a user account can be assigned:
  - ▶ A certain object which the user is allowed to configure
  - ▶ A certain role which defines the user's configurations abilities
- ▶ Via its user account a user can have access to an unlimited number of objects all with different rights defined by the assigned role.

# USER ACCESS TO OBJECTS (OrgUnits)

- ▶ The objects a user can have access to are called OrgUnits OU and are usually

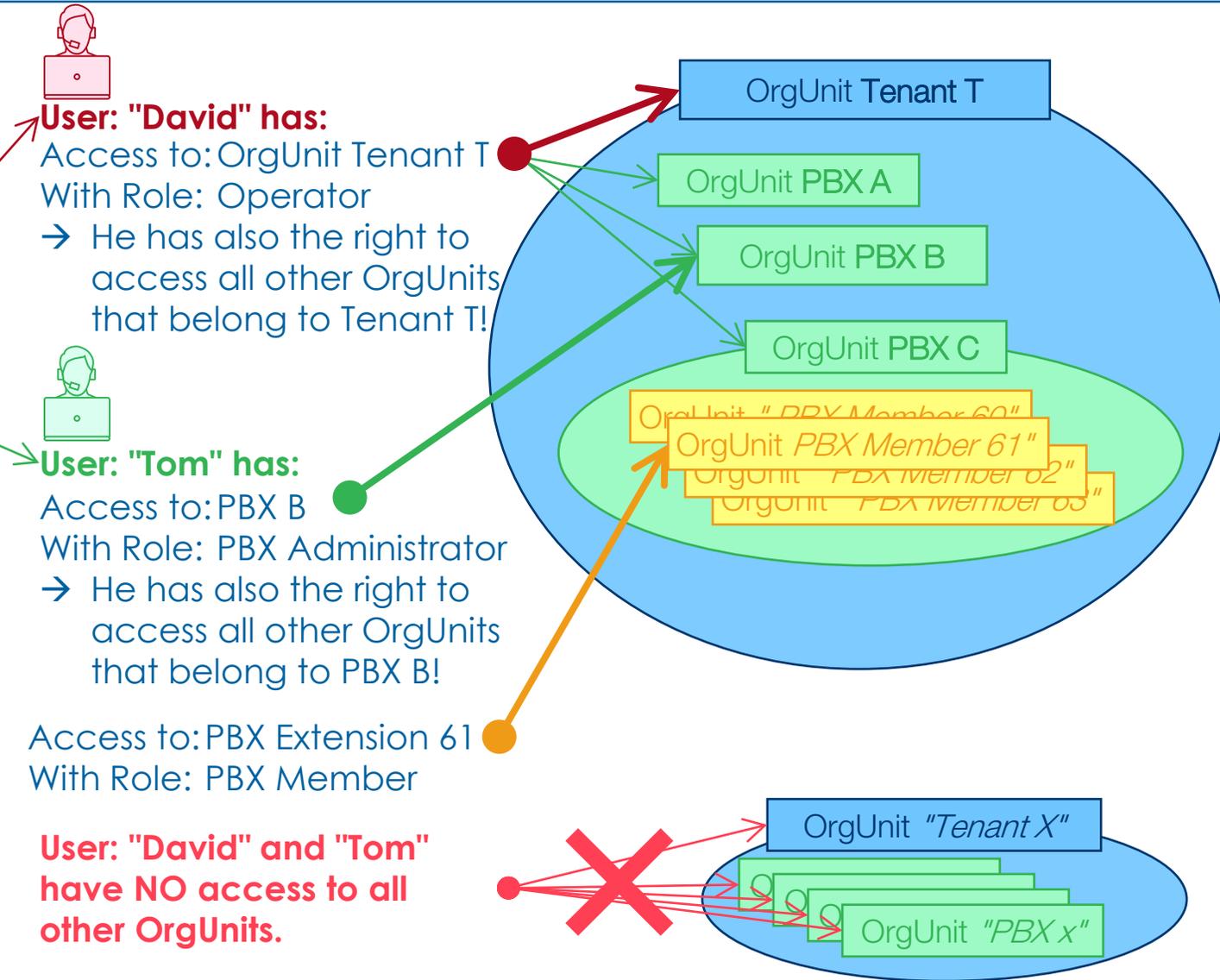
- ▶ Tenant
- ▶ PBX
- ▶ Extensions

- ▶ As user you get access to assigned OrgUnits, e.g.:

- ▶ OrgUnit: "Tenant T"
- ▶ OrgUnit: "PBX B"

- ▶ A user can be granted access rights to different OrgUnits with differing Roles.

- ▶ The assigned Role defines the rights to manipulate an OrgUnit.



## AVAILABLE USER ROLES

- ▶ As today the following user Roles are available:

Role	Access to OrgUnit	Description
Administrator	System	Full Read/Write rights on ALL OrgUnits and to the system resources e.g.: Zones, Gateway, etc..
Operator	System	Full Read/Write rights on ALL OrgUnits, but no system resources.
	Tenant	Full Read/Write rights on the assigned Tenant OrgUnits
PBX Administrator	PBX	Full Read/Write rights on the assigned Sub-OrgUnits PBX Member
Department Administrator	Department	Full Read/Write rights on the assigned Sub-OrgUnits PBX Member
PBX Member	PBX Member	Full Read/Write rights on the assigned PBX Member OrgUnits
Rest API	All types	Full Read/Write right on the assigned OrgUnits via the REST API

### Note

The Roles can be modified by an Aarenet system engineer.  
 → This would be a special project for a customer.

## MANAGING USER ACCOUNTS

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- ▶ User accounts are usually automatically created during the creation of its OrgUnit instance:
  - ▶ PBX creation → PBX Administrator
  - ▶ PBX department creation → Department Administrator
  - ▶ PBX extension creation → PBX Member
  
- ▶ Some user account types must be created manually when the OrgUnit or application access is needed:
  - ▶ Tenant creation → Administrator or Operator
  - ▶ CRM application access → Rest API
  - ▶ CTI application access → Recommended: Operator or PBX Administrator

# PREPARE THE USER CONFIGURATION VALUES

## ► User base values:

Topic	Example	Value	Description
<b>Base Settings</b>			
E-Mail	chief-sales@yupi.com	.....	The e-mail is the username of this user account. <div style="background-color: #ffff00; padding: 5px; display: inline-block;"> <b>Note</b> The username is not changeable after the initial creation of its user account.         </div>
First Name	Chief	.....	Any string
Last Name	Support	.....	Any string
Language	English	.....	Select the language for the Web Portal UI, In-Band messages and VoiceMail announcements

## ► User authentication values:

Topic	Example	Value	Description
<b>Settings</b>			
Owner	PA-PBX-0AX89001	.....	Select the OrgUnit this user is allowed to access.
Password	*****	.....	Any string, that is checked against certain criteria. The criteria may change from VoIP system to VoIP system.
LDAP Username		.....	Defines the LDAP username if a LDAP service is available

# PREPARE THE USER ROLE VALUES

## ▶ User Role values:

Topic	Example	Value	Description
<b>New Role</b>			
Select the Role	PBX Administrator	.....	Select the type of role: <ul style="list-style-type: none"><li>▶ Administrator</li><li>▶ Operator</li><li>▶ PBX Administrator</li><li>▶ Department Administrator</li><li>▶ PBX Member</li><li>▶ Rest API</li></ul>
OrgUnit	Tenant T	.....	Select one of the offered the OrgUnits

# INITIAL CREATION OF A USER ACCOUNT

## 1. Initial Creation of a User Account:

- > Menu: Operator or PBX Administrator
- > Sub-Menu: Users
- > Click button: + New

PBX Users

	E-Mail	First Name	Last Name	Access to (with Role)	User Blocked
<input type="checkbox"/>	boss@yupi.com	The	Boss	Boss (PBX Member) Test 90 (PBX Member)	
<input type="checkbox"/>	chief-supp@yupi.com	Chief	Support	Sales Department (Department Administrator)	

## 2. In the first step configure the mandatory settings of the user account.

- > Click button: + Save

Save

Base Settings	Settings
E-Mail chief-sales@yupi.com	Owner PA-PBX-0AX89001
First Name Chief	Password ••••••••
Last Name Sales	LDAP User Name
Language English	User blocked <input type="checkbox"/>

## 3. In the second step configure optional roles with access to OrgUnits OU

- > Tile: Roles
- > Click button: + New
- > Select the Role & Access to PBX, Department or PBX Member
- > Click button: Save

Roles

	Role	Access to	Parent OrgUnit
<input type="checkbox"/>	Department Administrator	Sales Department	PA-PBX-0AX89001

New role

Save

Select the Role  
PBX Member

Select the access to PBX or PBX Member  
Sales 1

Sales 1	PBX Member	(315)
Sales 2	PBX Member	(316)
Sales ACD	PBX Member	(45)

# MANAGING USER ACCOUNTS

- ▶ The authorized user can:
  - ▶ Change the basic user configurations.

## Note

Except the parameter "E-Mail" is the username!  
The username is not changeable after the initial creation of its user account.

- ▶ Change the password
- ▶ Change the authentication method
- ▶ Block/de-block the login
- ▶ Add/remove roles to assigned OrgUnits

PBX User

 PBX Users

 Save

Base Settings	Settings	Roles												
<p>E-Mail chief-sales@yupi.com</p> <p>First Name Chief</p> <p>Last Name Sales</p> <p>Language English</p>	<p>Owner PA-PBX-0AX89001</p> <p>Password ••••••</p> <p>LDAP User Name</p> <p>User blocked <input type="checkbox"/></p>	<p>+ New × Delete</p> <table border="1"> <thead> <tr> <th><input type="checkbox"/></th> <th>Role</th> <th>Access to</th> <th>Parent OrgUnit</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td>Department Administrator</td> <td>Sales Department</td> <td>PA-PBX-0AX89001</td> </tr> <tr> <td><input type="checkbox"/></td> <td>PBX Member</td> <td>Sales 1</td> <td>Sales Department</td> </tr> </tbody> </table>	<input type="checkbox"/>	Role	Access to	Parent OrgUnit	<input type="checkbox"/>	Department Administrator	Sales Department	PA-PBX-0AX89001	<input type="checkbox"/>	PBX Member	Sales 1	Sales Department
<input type="checkbox"/>	Role	Access to	Parent OrgUnit											
<input type="checkbox"/>	Department Administrator	Sales Department	PA-PBX-0AX89001											
<input type="checkbox"/>	PBX Member	Sales 1	Sales Department											

# LAST PAGE

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Date	Doc-ID	Description	Changes
8.3.2023	training_as7_202_portal_ui_user_account_e10	V7.11	
7.7.2023	training_as7_202_portal_ui_user_account_e11	V7.12: New feature two-factor authentication (TOTP)	Chapter 3
7.2.2024	training_as7_202_portal_ui_user_account_e12	Description of the login token added.	Page 11