

Training anSwitch V7

PORTAL USER INTERFACE UI & USER ACCOUNT

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INTRODUCTION & MOTIVATION

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"*

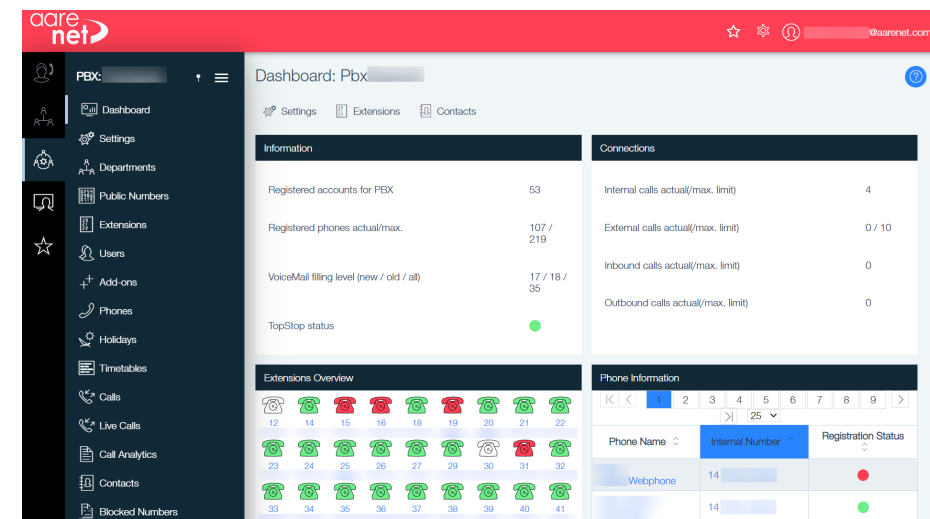
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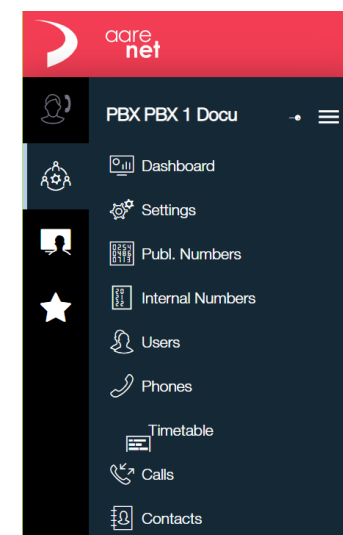
1 INTRODUCTION WEB BASED PORTAL USER INTERFACE

OVERVIEW PORTAL UI

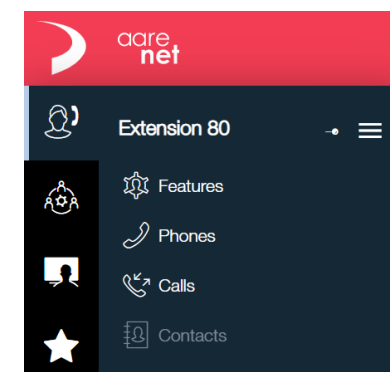
- ▶ The anSwitch V7 UI is called **Portal UI**
- ▶ The **Portal UI** is just **ONE** GUI with:
 - ▶ A consistent look and feel for all user roles and configurations
 - ▶ Automatic adaptation to the screen size
 - ▶ Possible customer customization
- ▶ The Portal UI is easy to handle:
 - ▶ All roles have 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"



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:

> Click link: Password forgotten?

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

Login

Welcome to the Aarenet anSwitch V7

Username

john.deer@yupi.com

Password

.....

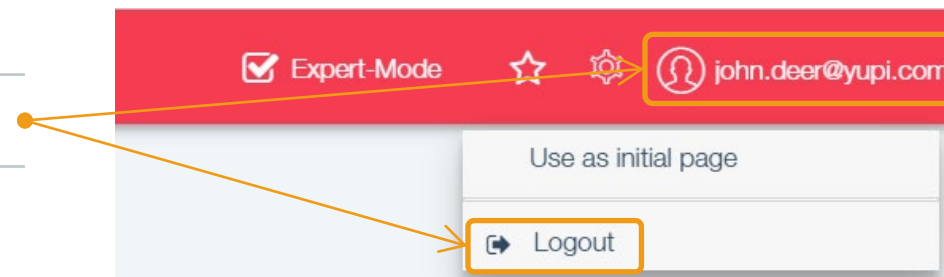
Login

Password forgotten?

PORTAL UI LOGOUT

▶ A logged in user can properly logout:

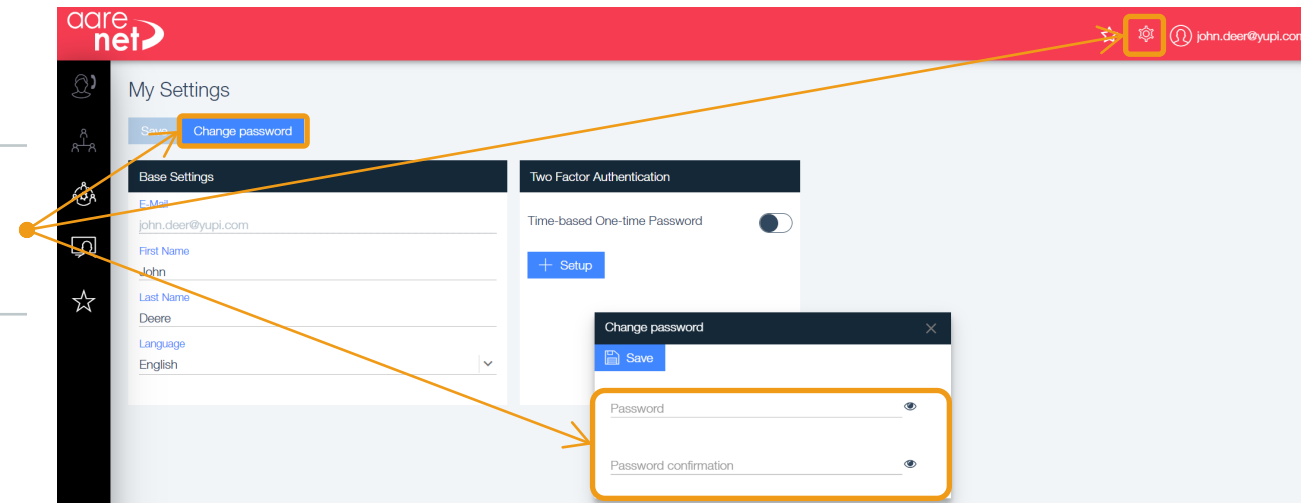
- > Click icon: 
- > Click button: Logout



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

- ▶ 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 were registered.


The user must execute a normal login the next time.

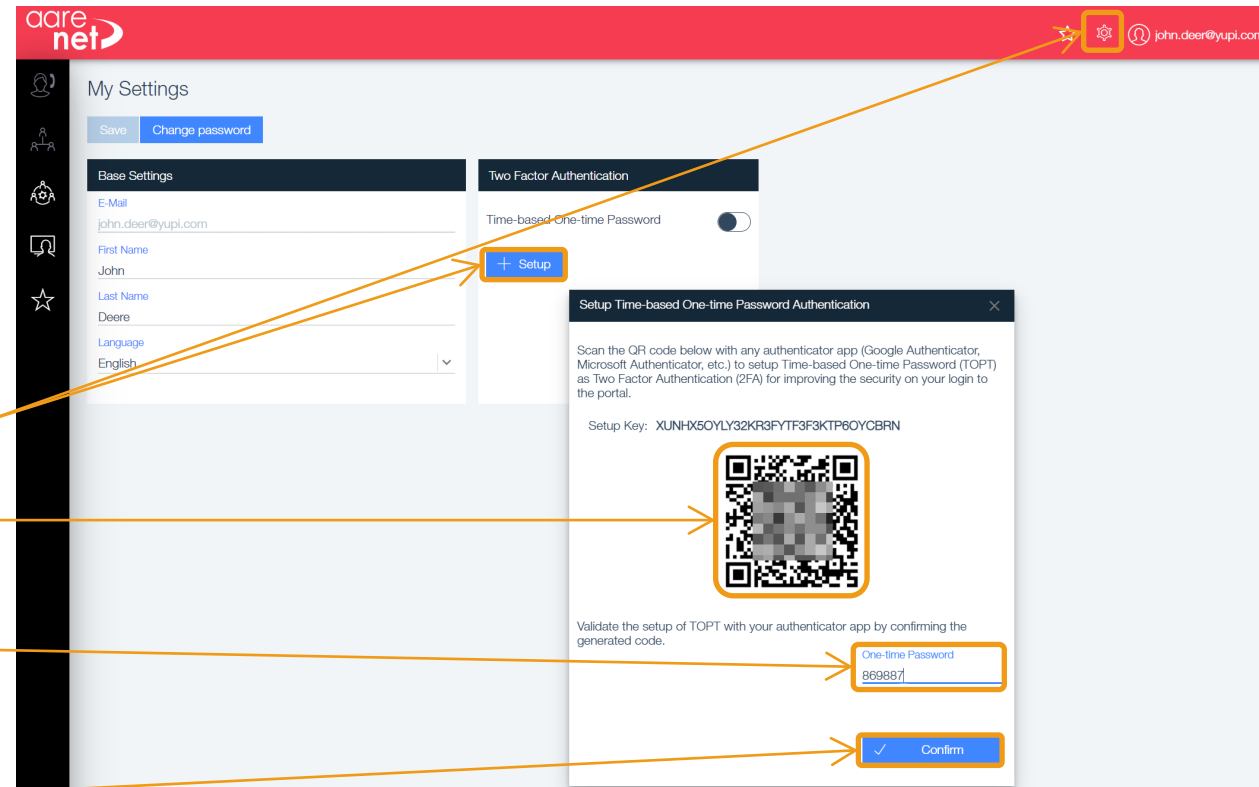
3 LOGIN WITH TWO-FACTOR AUTHENTICATION

OVERVIEW TWO-FACTOR AUTHENTICATION

- ▶ 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

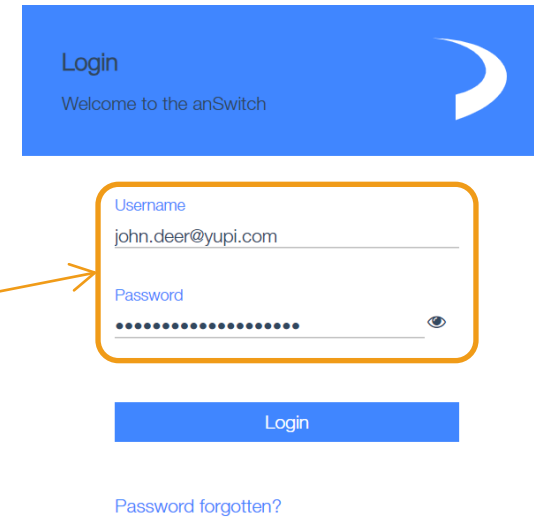


LOGIN WITH TWO-FACTOR AUTHENTICATION

- ▶ 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

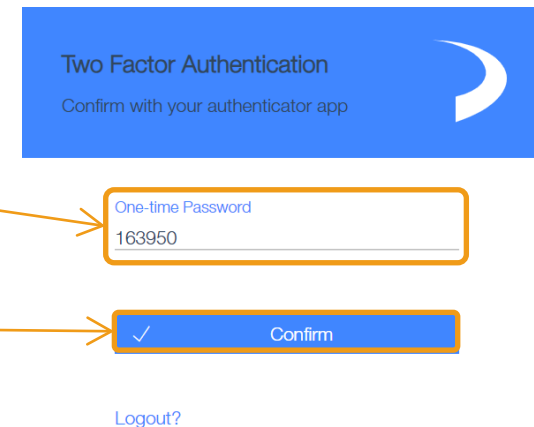


The login form is a blue rectangular box. At the top left, it says "Login" and "Welcome to the anSwitch". On the top right is a white curved arrow icon. Below the header, there are two input fields: "Username" with the value "john.deer@yupi.com" and "Password" with masked characters. Below these fields is a blue "Login" button. At the bottom, there is a link "Password forgotten?".

b. The two-factor authentication dialog opens

c. Insert the code delivered by the TOTP application.

> Click button: Confirm





The two-factor authentication dialog is a blue rectangular box. At the top left, it says "Two Factor Authentication" and "Confirm with your authenticator app". On the top right is a white curved arrow icon. Below the header, there is a "One-time Password" input field containing the value "163950". Below this field is a blue "Confirm" button with a white checkmark icon. At the bottom, there is a link "Logout?".

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

<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

Department

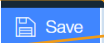
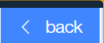

Name

Support Department

Description

Support Department

Department Settings

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

[+ New](#) [X 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

- ▶ For deleting an instance

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

PBX List

[+ New](#) [X 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 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 ...

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

+ New - Delete

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

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 Extension Name Extension State


bo

✓ Apply

+ New	× Delete		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

- ▶ Delete filters by clicking the 

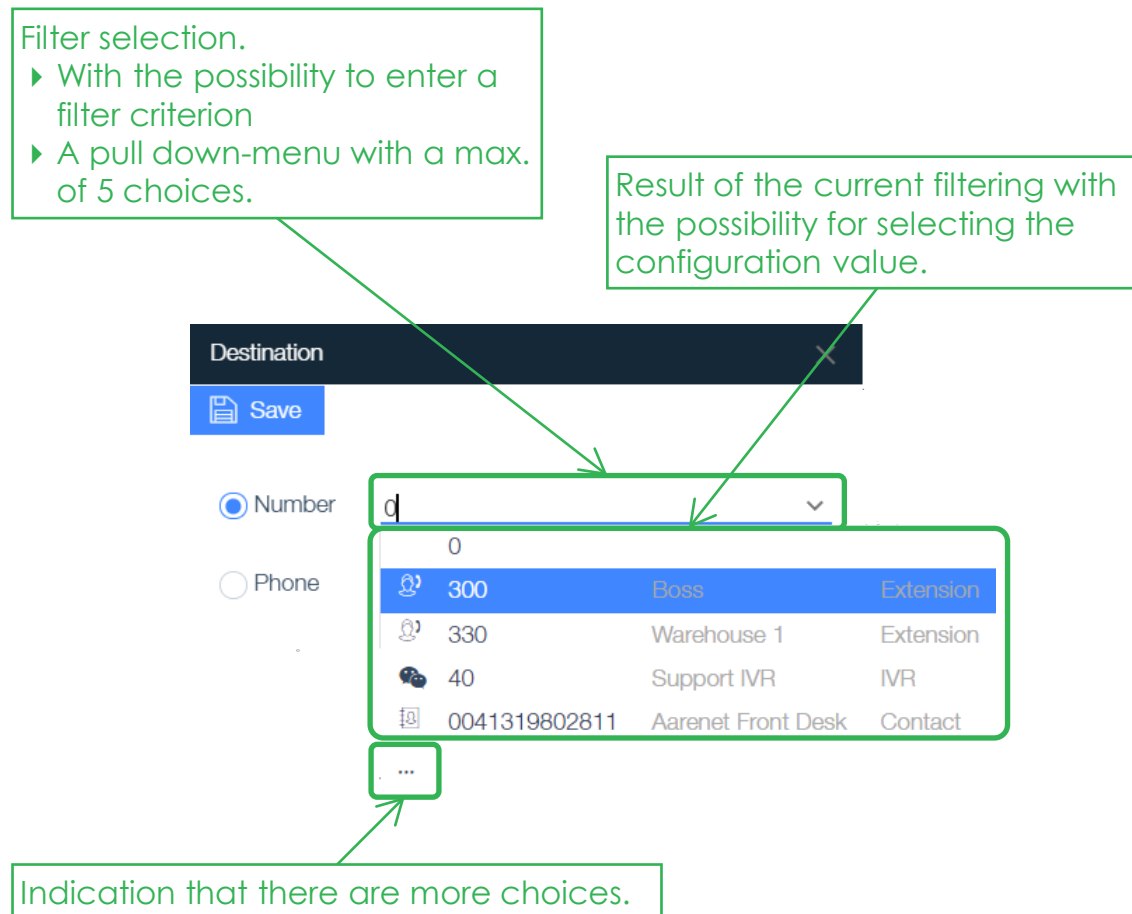
 Extension: 31 × Phone/Device Name: bo ×

+ New	× Delete		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	●

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.



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

PBX Dashboard

<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	●

Help for Phones & Devices

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.

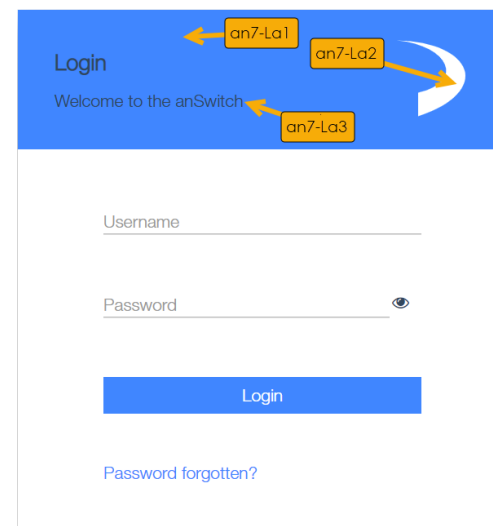
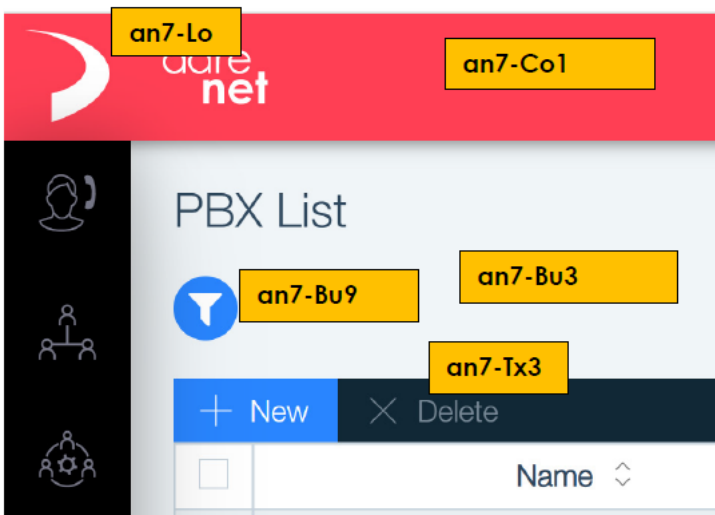
Connecting Special Devices to a PBX

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

8 PORTAL UI CUSTOMER CUSTOMIZATION

OVERVIEW PORTAL UI 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	

9 USER ACCESS & USER ROLES

OVERVIEW USER ACCESS & USER ACCOUNT

- ▶ 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

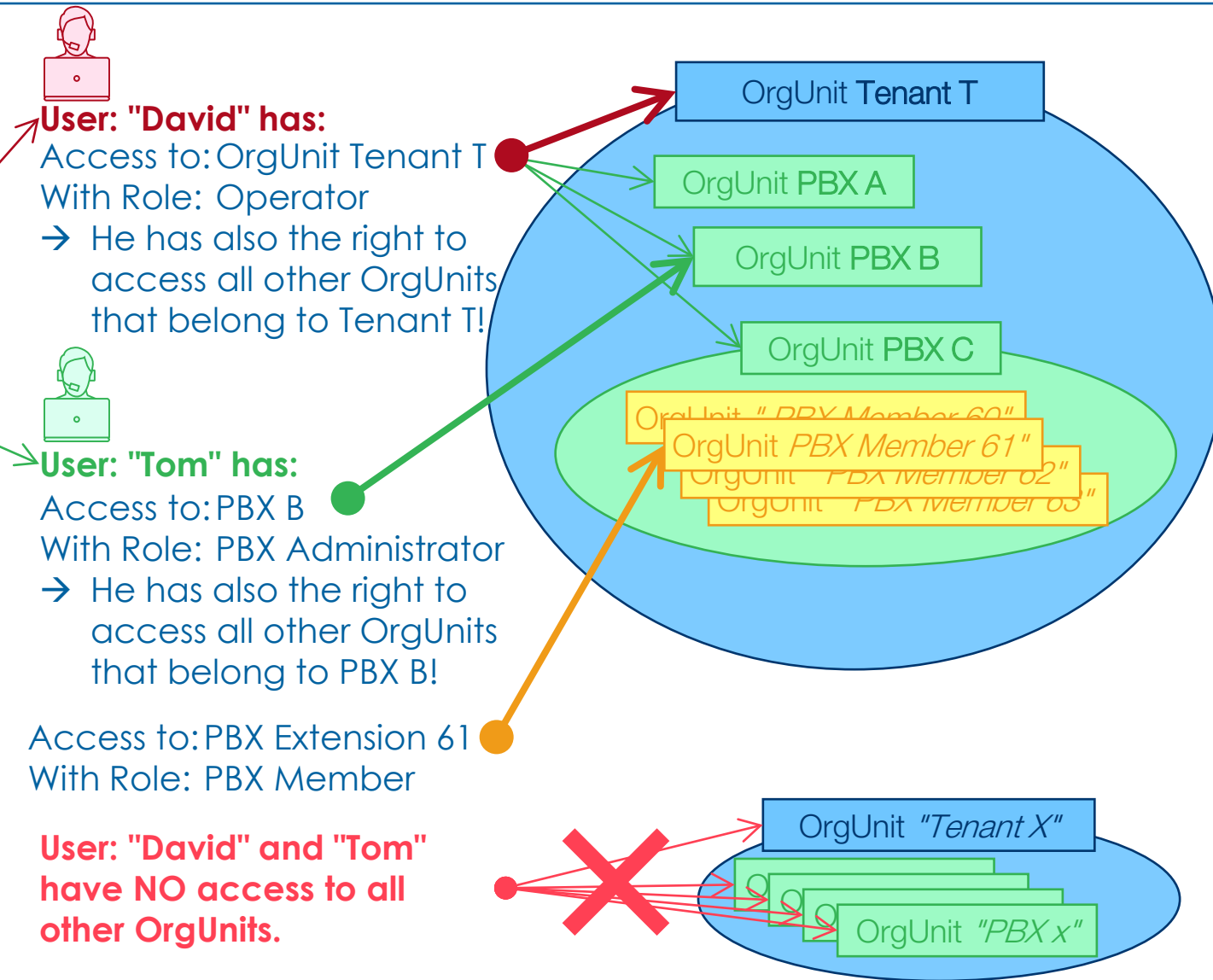
- ▶ Tenant
- ▶ PBX
- ▶ Extensions

- ▶ 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

- ▶ 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
Base Settings			
E-Mail	chief-sales@yupi.com	.....	The e-mail is the username of this user account. Note The username is not changeable after the initial creation of its user account.
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
Settings			
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
New Role			
Select the Role	PBX Administrator	.....	Select the type of role: <ul style="list-style-type: none">► Administrator► Operator► PBX Administrator► Department Administrator► PBX Member► Rest API
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

+ New X Delete

	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-sup@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

+ New X Delete

	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 PBX Member (316)

Sales 1	PBX Member	(316)
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 X Delete</p> <table><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

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