

Training anSwitch V7

MANAGING PHONE/ADD-ON TYPES & TEMPLATES

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INTRODUCTION & MOTIVATION

This training covers the topics:

- ▶ How phone and add-on types are organized.
- ▶ Where to get information about available phone templates, how to obtain and how to activate them.

After this training, the trainee is enabled:

- ▶ To understand how the phone and add-on types are organized.
- ▶ To know where and how to get available phone templates.
- ▶ To advise customers how to obtain new phone templates for their anSwitch V7.
- ▶ Uploading phone and add-on templates to the anSwitch V7.



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

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1 OVERVIEW ABOUT PHONE/ADD-ON TYPES & TEMPLATES

OVERVIEW ABOUT PHONE/ADD-ON TYPES & TEMPLATE

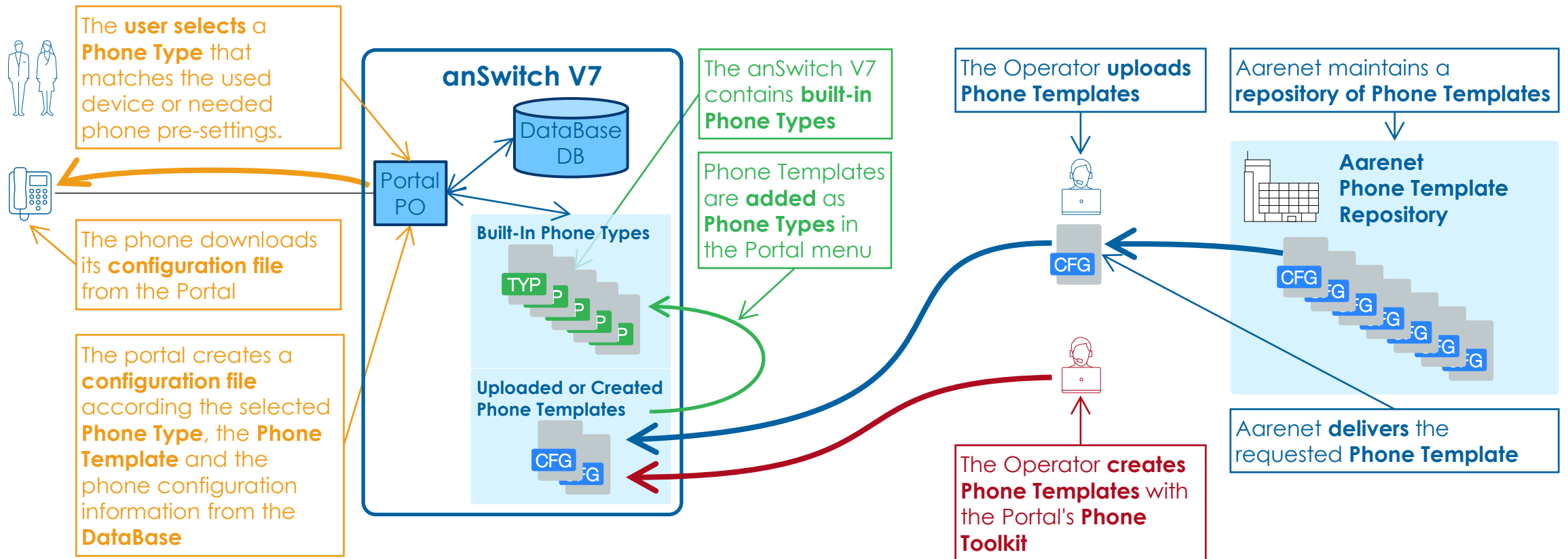
- ▶ The anSwitch V7 allows the customer to provision defined phones, auxiliary phone keyboards, DECT systems and other SIP-devices out of the Portal UI.
- ▶ With "Phone Templates" for phones and "Add-On Templates" for DECT-systems and other terminal types the customer gets the possibility to extent the list of SIP devices which can be provisioned via the Portal UI.
- ▶ The "Phone/Add-On Toolkit" in the Portal UI allows to create new "Phone /Add-On Templates":
 - a. Derived from an existing parent template
 - b. From scratch for any type of SIP-device

Note

This document describes the management of Phone Types and Phone Templates in detail. The same applies to Add-On Types and Add-On Templates, only possible differences are described.

OVERVIEW OF PHONE/ADD-ON TYPE & TEMPLATE ORIGIN

► Origin and deployment of Phone/Add-On Types & Template.



OVERVIEW OF PHONE/ADD-ON TYPE & TEMPLATE ORIGIN

- ▶ The "Phone Templates" are either **built-in, uploaded or created**
 - ▶ **Built-in** "Phone Templates" in the Portal UI are visible as selectable "Phone Types".
 - ▶ **Uploaded** "Phone Templates" are from an external repository and will become visible as selectable "Phone Type" in the Portal UI.
 - ▶ **Created** "Phone Templates" by the "Phone Toolkit" will become visible as selectable "Phone Type" in the Portal UI.

PHONE/ADD-ON TEMPLATES AND ORGUNITIS

▶ Phone/Add-On Templates are bound to OrgUnits

This enables specific Phone Templates of the same phone type for:

- ▶ The system
- ▶ Different Tenants
- ▶ Different PBXs
- ▶ Different departments of a PBX

Example:

A customer may have two departments: Sales, Support.

Both departments use the same phone type. But the settings for the configurable keys must be different and standardized within their departments.

Two phone templates can be created containing the specific needs of the departments. Each phone template is assigned to its department OrgUnit.

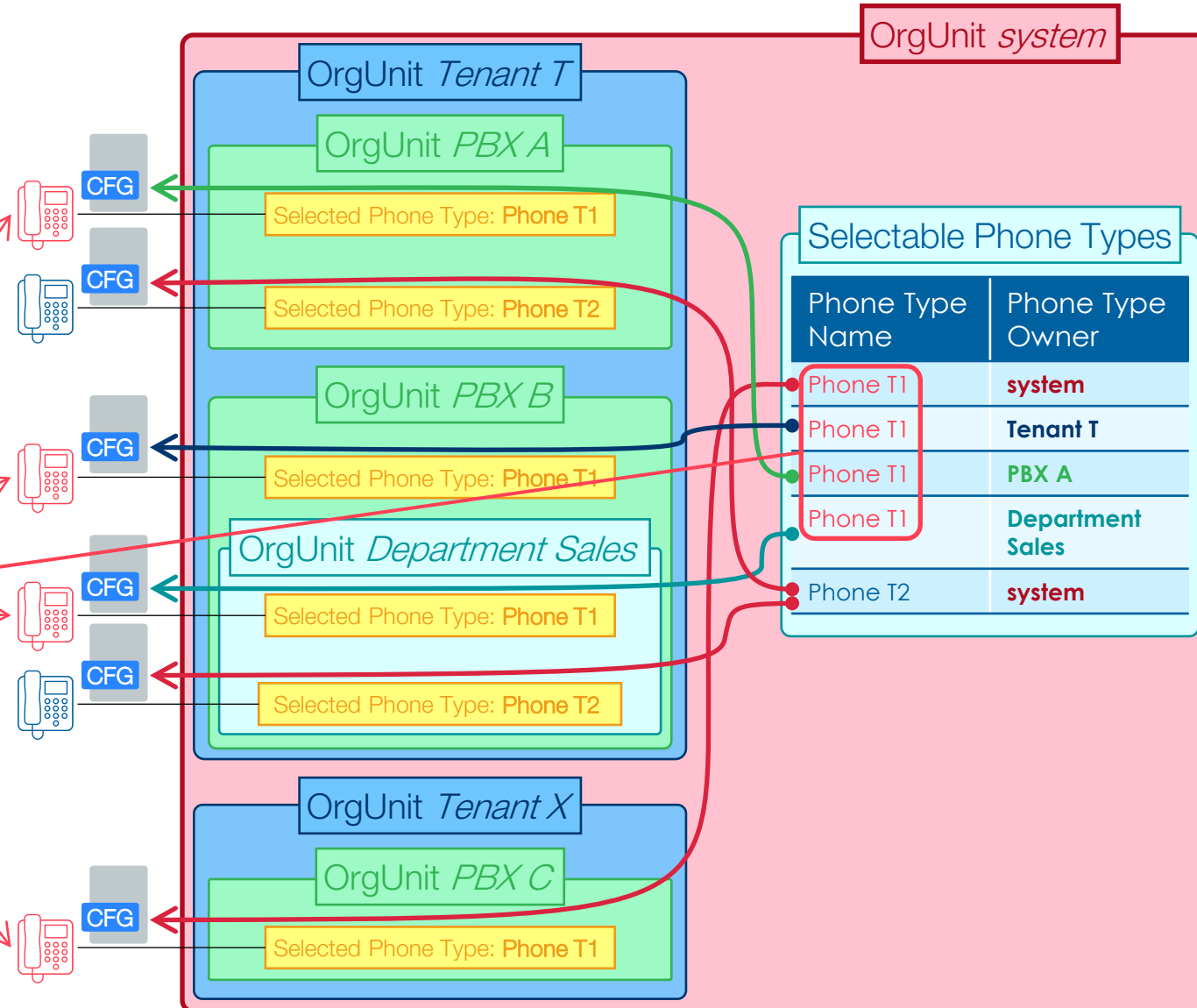
The PBX Administrator or the Department Administrator can then use the specific phone type at need.

APPLYING PHONE/ADD-ON TEMPLATES WITH THE SAME NAME

- ▶ If Phone Templates have the same name, then the assigned owner OrgUnit decides which Phone Template is used for the creation of the device configuration file.

We have 4 times the same phone type name "Phone T1".

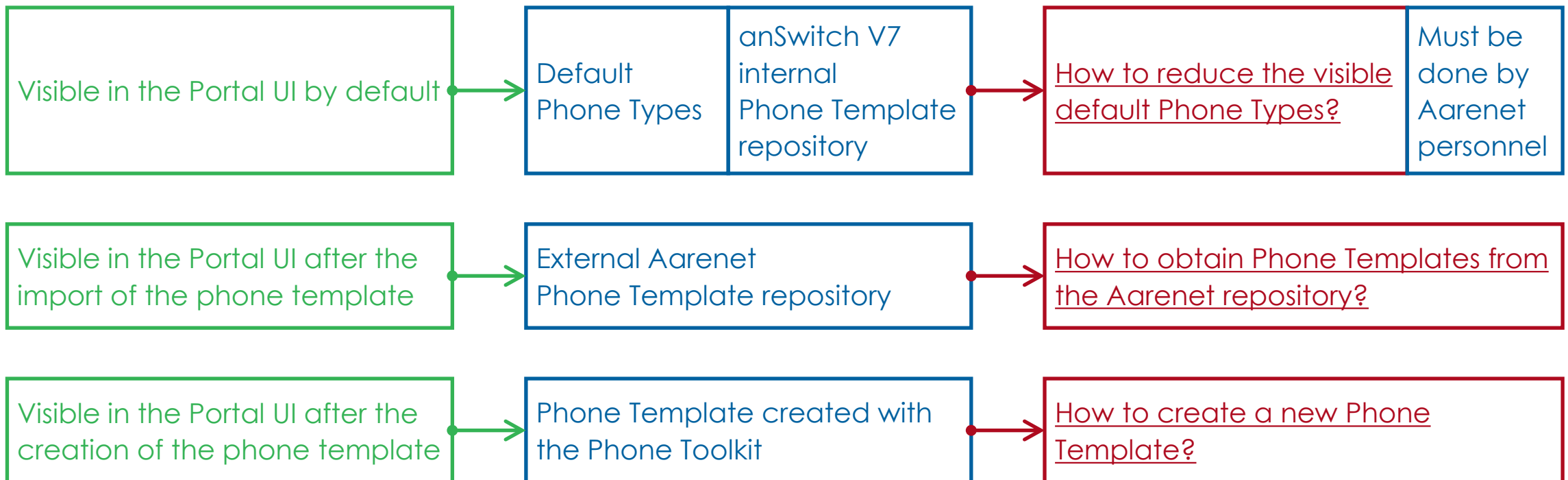
Due to the OrgUnit inheritance concept these 4 phones will have probably a different configuration.



2 MANAGING PHONE/ADD-ON TYPES

OVERVIEW MANAGING PHONE/ADD-ON TYPES

- ▶ The offered phone types in the portal UI "Phone settings" can be managed by Aarenet employees and to some extent also influenced by the customer.
- ▶ Visibility and sourcing of Phone Types



HOW TO REDUCE THE VISIBLE DEFAULT PHONE/ADD-ON TYPES?

- ▶ During anSwitch V7 provisioning time:
 - ▶ Contact your Aarenet project manager and place the requested modifications
 - ▶ The Aarenet account manager will eventually place an offer
 - ▶ The requested displayed phone type list changes are done by Aarenet personnel

- ▶ During anSwitch V7 operation time:
 - ▶ Post a helpdesk ticket with the requested modifications
 - ▶ The Aarenet account manager will eventually place an offer
 - ▶ The requested displayed phone type list changes are done by Aarenet personnel

HOW TO OBTAIN PHONE TEMPLATES FROM THE AARENET REPOSITORY?

- ▶ During anSwitch V7 provisioning time:
 - a. Contact your Aarenet project manager and request the desired phone template
 - b. The Aarenet account manager will eventually place an offer
 - c. The requested phone template will be delivered
 - d. Aarenet personnel will import the phone template

- ▶ During anSwitch V7 operation time:
 - a. Post a helpdesk ticket with the requested desired phone template
 - b. The Aarenet account manager will eventually place an offer
 - c. The requested phone template will be delivered
 - d. Aarenet personnel or an Operator may import the phone template

HOW TO CREATE A NEW PHONE/ADD-ON TEMPLATE?

- ▶ Let Aarenet do it:
 - a. Place a helpdesk ticket with the requested phone type
 - b. The Aarenet account manager will eventually place an offer
 - c. The requested phone template will be delivered
 - d. Aarenet personnel or an Operator will import the phone template

- ▶ Do it yourself:
 - a. If there is a related phone type in the built-in or external repository available, then it is a good idea to place a helpdesk ticket with the request for the related phone template
 - b. The Aarenet account manager will eventually place an offer
 - c. The requested related phone template will be delivered
 - d. Start the creation of the new phone type, see for details document:
"Phone/Add-On Type Toolkit"
(Doc-ID: training_as7_702_part_2_phone_toolkit_e)

3 UPLOADING A PHONE TEMPLATE

UPLOADING A PHONE/ADD-ON TEMPLATE

- ▶ Upload a phone template from a trusted source.
 - ▶ As example upload a customer specific Yealink T27 template with key configurations defined for the sales department:
PhoneTypes_YealinkT27_Customer_Department_Sales.txt

▶ Login as Operator

1. Upload the phone template file

- > Menu: Operations
- > Sub-Menu: Phone Types or Add-On Types
- > Click button: Import

2. Select the OrgUnit this phone template belongs to e.g.: the PBX of the customer

- > Select the OrgUnit this Phone Template belongs to
- > Select the phone template file, click button:
+ Choose phone type file(s)
- > In the confirmation dialog click: Yes

3. Check the result

- ▶ New Phone Template in the list of phone types
- ▶ New Telephone Type in the phone setup dialog

Phone Types

+ New Import Export Delete

No entries found

Import Phone Types

OrgUnit
TenantDemo

+ Choose phone type file(s)

Confirmation

You are importing 1 new phone types: Yealink_T27 Department Sales

Yes No

Phone Setup - 205

Save

Phone

Provisioning Option *
Auto-Provisioning

Telephone Type *
Yealink T27 Department Sales Custom

Name
Agent 1 - Yealink T27 Department Sales

Password for Web access:
.....

MAC Address *
11:22:33:44:55:66

Time Zone
Europe/Zurich

+ New Import Export Delete

	Name	Member of	Num
<input type="checkbox"/>	Yealink_T27 Department Sales	TenantDemo	6

4 THE AARENET PHONE TEMPLATE REPOSITORY

OVERVIEW AARENET PHONE TEMPLATE REPOSITORY

- ▶ The Aarenet Phone Template Repository is continuously extended.
- ▶ Currently are Phone Templates of the following brands available
 - ▶ Many Phone Templates:
 - ▶ Yealink
 - ▶ Snom
 - ▶ Some Phone Templates:
 - ▶ Alcatel
 - ▶ Fanvil
 - ▶ Grandstream
 - ▶ Panasonic
 - ▶ Polycom
- ▶ As the Aarenet Phone Template Repository is growing over time place a ticket and ask the current state of a certain phone type:
<https://helpdesk.aarenet.com>
- ▶ Customers are kindly invited to contribute phone templates to this repository.

► Yealink SIP-T19 – SIP-T33

[illegible]

► Yealink SIP-T40 – SIP-T49

[illegible]

YEALINK: SIP-T52 – SIP-T59 – PHONE TEMPLATES

► Yealink SIP-T52 – SIP-T59

Template Source	Phone Type Names																
	SIP-T52S	SIP-T53	SIP-T53W	SIP-T54S	SIP-T54W	SIP-T56A	SIP-T57W	SIP-T58V	SIP-T58A	SIP-VP59							
Built-In		X	X	X	X		X										
Aarenet Repository	X	X	X	X	X	X	X	X	X	X							

SNOM: D-SERIES – PHONE TEMPLATES

► Snom D-Series

Template Source	Phone Type Name								
	D315	D335	D385	D712	D715	D717	D725	D735	D785
Built-In	X	X	X		X	X		X	X
Aarenet Repository	X	X	X		X	X		X	X

ALCATEL & FANVIL – PHONE TEMPLATES

► Alcatel

Template Source	Phone Type Name			
	ALE M3	ALE M5	ALE M7	ALE H2P
Built-In				
Aarenet Repository	X	X	X	X

► Fanvil

Template Source	Phone Type Name
	C600
Built-In	
Aarenet Repository	X

GRANDSTREAM & PANASONIC – PHONE TEMPLATES

► Grandstream

Template Source	Phone Type Name								
	GXP1615	GXP1625	GXP1628	GXP2130	GXP2135	GXP2140	GXP2160	GXP2170	GXV3370
Built-In	X	X	X	X	X	X	X	X	
Aarenet Repository	X	X	X	X	X	X	X	X	X

► Panasonic

Template Source	Phone Type Name
Built-In	KX-HDV430
Aarenet Repository	X

POLYCOM – PHONE TEMPLATES

► Polycom

Template Source	Phone Types		
	VVX 101	VVX 201	VVX 600
Built-In			
Aarenet Repository	X	X	X

5 BEHIND THE SCENES

6 PHONE TYPES ANSWITCH V7 SYSTEM CONFIGURATION

OVERVIEW OF THE ANSWITCH SYSTEM LEVEL CONFIGURATIONS

- ▶ Overview of the anSwitch system level configurations:
 - ▶ The displayed built-in standard phone type list can be replaced by specific list assigned to an OrgUnit.
 - ▶ This means that different phone type lists can be assigned to tenants, individual PBXs, etc.
 - ▶ The desired phone type list must be defined by the customer.
 - ▶ The configuration, installation and activation of customer specific phone type list must be done by an Aarenet system engineer.

Note

With new anSwitch V7 releases it may be necessary to update the specific phone type lists.

DEFINE A NEW PHONE TYPE LIST

▶ The format of a phone type list bases on the anSwitch V7 Portal page definitions

- ▶ File type MS Excel: .xlsx
- ▶ File name is a unique name with a mandatory name part '_portal', example: ProviderA_portal.xlsx
- ▶ File contents:

Any other customer specific page configurations of the Portal.

Unique key of the phone type list.
→ Is used in the OrgUnit attribute configuration.

Displayed phone type names in the phone type selection on the phone settings page.

Make a phone type:

- ▶ Invisible: - (not empty!)
- ▶ Display it: rw

Note:
When a phone type key is not listed or not explicitly defined as invisible, then the phone type is displayed!

A	B	C	D	E	F	G	H	I	J
key	lang.en	role.admin	role.operator	role.pbx	role.department	role.extension	role.subscriber	role.guest	
(ProviderA)									
Dashboard Page									
pbxDashboard_title	Provider A Dashboard of PBX	rw	rw	rw	rw	rw	r	r	
Phone Types									
parentPhoneSetup_dev_type_yealinkW60B	Yealink W60B	-	-	-	-	-	-	-	
parentPhoneSetup_dev_type_yealinkW70B	Yealink W70B	-	-	-	-	-	-	-	
parentPhoneSetup_dev_type_yealinkW80B	Yealink W80B	-	-	-	-	-	-	-	
phoneSetup_dev_type_yealinkT21PE2	Yealink T21P E2	-	-	-	-	-	-	-	
phoneSetup_dev_type_yealinkT40G	Yealink T40G	-	-	-	-	-	-	-	
phoneSetup_dev_type_yealinkT53W	Yealink T53W	-	-	-	-	-	-	-	
phoneSetup_dev_type_yealinkT54W	Yealink T54W	-	-	-	-	-	-	-	
phoneSetup_dev_type_yealinkT57W	Yealink T57W	-	-	-	-	-	-	-	
phoneSetup_dev_type_yealinkT58A	Yealink T58A	-	-	-	-	-	-	-	
phoneSetup_dev_type_yealinkW60B	Yealink W60B	-	-	-	-	-	-	-	
phoneSetup_dev_type_yealinkW70B	Yealink W70B	-	-	-	-	-	-	-	
phoneSetup_dev_type_yealinkW53H	Yealink W53H	-	-	-	-	-	-	-	
phoneSetup_dev_type_yealinkW56H	Yealink W56H	-	-	-	-	-	-	-	
phoneSetup_dev_type_snomD315	snom D315	rw	rw	rw	rw	rw	rw	rw	
phoneSetup_dev_type_snomD335	snom D335	rw	rw	rw	rw	rw	rw	rw	
phoneSetup_dev_type_snomD385	snom D385	-	-	-	-	-	-	-	
phoneSetup_dev_type_snomD715	snom D715	-	-	-	-	-	-	-	
phoneSetup_dev_type_snomD717	snom D717	-	-	-	-	-	-	-	
phoneSetup_dev_type_snomD735	snom D735	-	-	-	-	-	-	-	
phoneSetup_dev_type_snomD745	snom D745	-	-	-	-	-	-	-	
phoneSetup_dev_type_snomD785	snom D785	-	-	-	-	-	-	-	
phoneSetup_dev_type_snomM25	snom M25	-	-	-	-	-	-	-	

DEFINE A NEW PHONE TYPE LIST

- Usage of the unique phone type list Portal page key
 - This key is set in the OrgUnit attribute "guiProfile" and assigns the phone type list to an OrgUnit, e.g. tenant, PBX, department

Examples:

- System default phone type list

- No key needed

	A	B	
1	key		lang
2			
3	Phone Types		

- A tenant specific phone type list

- Define a unique key

	A	B	
1	key (ProviderA)		lang
2	Dashboard Page		
3		pbxDashboard_title	Prov
4			
5	Phone Types		

- A PBX specific phone type list

- Define a unique key

	A	B	
1	key (PaPbx0AX89001)		lang
2	Dashboard Page		
3		pbxDashboard_title	Yup
4			
5	Phone Types		

Best
Practice

Have the key in the file name, e.g.:
ProviderA_portal.xlsx
PaPbx0AX89001_portal.xlsx

CONFIGURE, DEPLOY AND ACTIVATE THE DISPLAYED PHONE TYPES

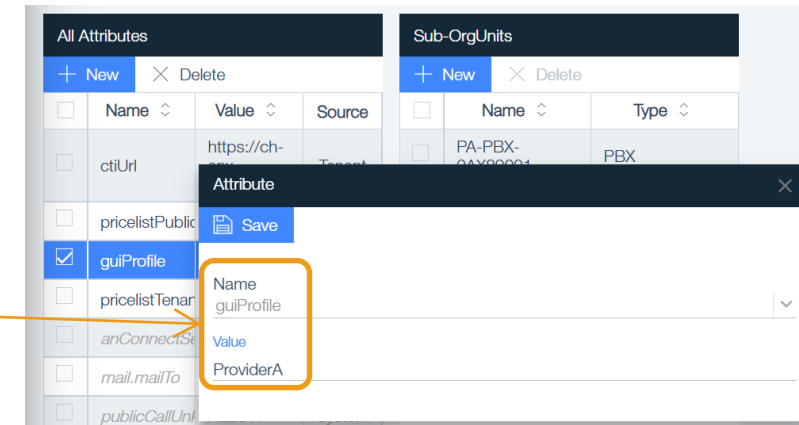
1. Prepare the needed displayed phone type list files as explained above.
2. Deploy the phone type list files to the server/hosts where the Portal container is operative
 - a. Make sure to have the portal directory ready, check

```
[root]# cd /etc/aareswitch/portal
```
 - b. Copy the prepared *_portal.xlsx files to /etc/aareswitch/portal/
3. Restart all operative Portal components
 - ▶ Execution order when several *_portal.xlsx files are in the directory /etc/aareswitch/portal/
 - 1st : portal.xlsx
 - 2nd : *_portal.xlsx → In the order of the Linux file name ordering.

CONFIGURE, DEPLOY AND ACTIVATE THE DISPLAYED PHONE TYPES

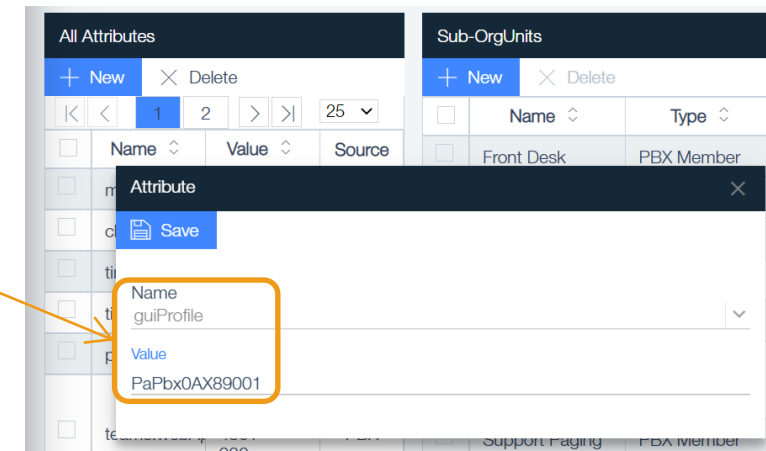
4. Activate a phone type list

- ▶ As the system default
Nothing else needs to be done.
- ▶ As a tenant specific phone type list
 - ▶ Login as tenant Operator
 - > Menu: Operator
 - > Sub-Menu: Organization Units
 - > In file "All Attributes" click button: + New
 - > Configure the attribute:
 - ▶ Name: guiProfile
 - ▶ Value: The key of the phone type list, e.g.: ProviderA



▶ As a PBX specific phone type list

- ▶ Login as tenant Operator
 - > Menu: Operator
 - > Sub-Menu: Organization Units
 - > In file "Sub-OrgUnits" select the desired PBX
 - > In file "All Attributes" click button: + New
 - > Configure the attribute:
 - ▶ Name: guiProfile
 - ▶ Value: The key of the phone type list, e.g.: PaPbx0AX89001



CONFIGURE, DEPLOY AND ACTIVATE THE DISPLAYED PHONE TYPES

5. Check the phone type selection

- ▶ The system default phone types
 - ▶ Login as Administrator
 - ▶ Select from a tenant with no own phone type list a PBX with no own phone type list
 - ▶ Check on the phone settings the displayed phone types:
 - ▶ The types of the tenant phone type list should be displayed
 - ▶ Assigned customer types from the Phone Templates may be displayed
- ▶ Tenant specific phone types
 - ▶ Login as tenant Operator
 - ▶ Select a PBX with no own phone type list
 - ▶ Check on the phone settings the displayed phone types:
 - ▶ The types of the tenant phone type list should be displayed
 - ▶ Assigned customer types from the Phone Templates may be displayed

Note

If an Operator chooses a PBX with own phone type list, then the phone types of the tenant phone type list and the PBX phone type list are displayed and can be selected by the Operator.

- ▶ PBX specific phone types
 - ▶ Login as PBX Administrator
 - ▶ Check on the phone settings the displayed phone types:
 - ▶ The types of the PBX phone type list should be displayed
 - ▶ Assigned customer types from the Phone Templates may be displayed

LAST PAGE

Date	Doc-ID	Description	Changes
8.9.2022	training_as7_702_part_1_phone_type_managing_e08	New document	
28.6.2023	training_as7_702_part_1_phone_type_managing_e09	V7.12: New feature Add-On Type & Templates	Overdone chapter 1