

# VOCUS HOSTED PBX USER PROFILE SET-UP WITH POLYCOM DEVICE

## QUICK REFERENCE GUIDE

This document provides step by step instructions on how to provision a new Hosted PBX user profile for a Polycom handset.

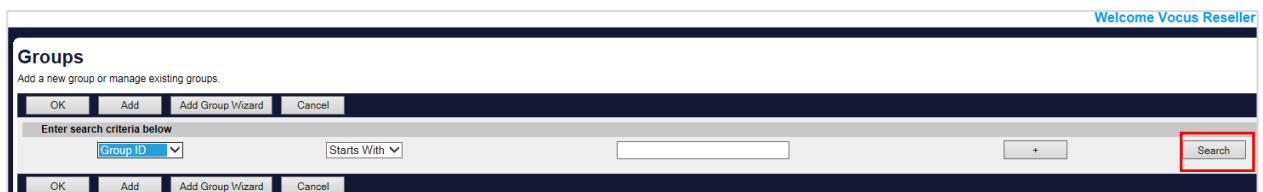
It will also demonstrate Vocus Device Management System, also known as DMS, to auto provision the Polycom handsets using MAC address authentication:

**Training Video: Refer to Hosted PBX User Profile set-up with Polycom Device**

# PROVISION A NEW HOSTED PBX USER PROFILE



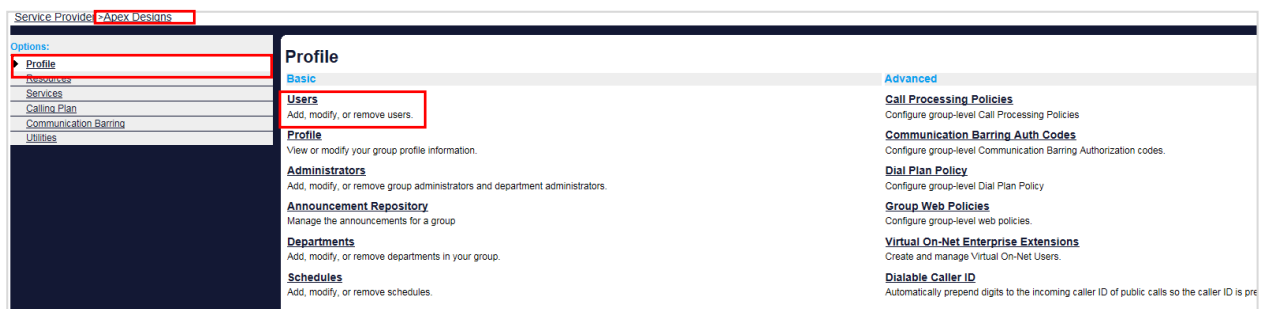
> From the **Profile** menu, select **Groups**



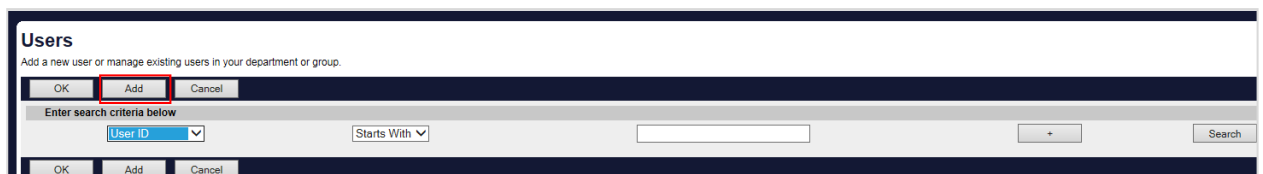
> Click the **Search** button



> Click on the customer you wish to provision



> From the **Group>Profile** menu, click **Users**



> Click the **Add** button

Service Provider > Apex Designs

Options:

- Profile
- Resources
- Services
- Calling Plan
- Communication Barring
- Utilities

### Users Add

Add a new user to your group.

OK Cancel

Service Provider: DemoReseller Group: Apex Designs

\* User ID: 0385480606 @ pbx.vocus.net

\* Last Name:  \* First Name:

\* Calling Line ID Last Name:  \* Calling Line ID First Name:

Name Dialing Last Name:  Name Dialing First Name:

\* Initial Password:  \* Re-type Initial Password:

Department: None Language: English

Time Zone: (GMT+11:00) Australia/Victoria Network Class of Service: None

Additional Information

Title:

Pager:  Mobile:

E-mail:  YahooID:

Location:

Address:

City:  State/Province: -- Select --

Zip/Postal Code:  Country:

OK Cancel

- > You are now in the **Users Add** screen
- > For the Broadsoft user ID, Vocus recommends using the full phone number that is to be assigned to the user

Service Provider > Apex Designs

Options:

- Profile
- Resources
- Services
- Calling Plan
- Communication Barring
- Utilities

### Users Add

Add a new user to your group.

OK Cancel

Service Provider: DemoReseller Group: Apex Designs

\* User ID: Apex0606 @ pbx.vocus.net

\* Last Name:  \* First Name:

\* Calling Line ID Last Name:  \* Calling Line ID First Name:

Name Dialing Last Name:  Name Dialing First Name:

\* Initial Password:  \* Re-type Initial Password:

Department: None Language: English

Time Zone: (GMT+11:00) Australia/Victoria Network Class of Service: None

Additional Information

Title:

Pager:  Mobile:

E-mail:  YahooID:

Location:

Address:

City:  State/Province: -- Select --

Zip/Postal Code:  Country:

OK Cancel

- > If only an extension number is to be assigned to the user, Vocus recommends using a format similar to the customer name, followed by the extension number

Service Provider > Apex Designs

Options:

- Profile
- Resources
- Services
- Calling Plan
- Communication Barring
- Utilities

### Users Add

Add a new user to your group.

Service Provider: DemoReseller      Group: Apex Designs

\* User ID: 0385480606 @ pbx.vocus.net

\* Last Name: McCartney      \* First Name: Paul

\* Calling Line ID Last Name: McCartney      \* Calling Line ID First Name: Paul

Name Dialing Last Name:      Name Dialing First Name:

\* Initial Password: \*\*\*\*\*      \* Re-type Initial Password: \*\*\*\*\*

Department: None      Language: English

Time Zone: (GMT+11:00) Australia/Victoria      Network Class of Service: None

Additional Information

Title:      Mobile:      Pager:      YahooID:      E-mail:      Location:      Address:      City:      State/Province: -- Select --      Zip/Postal Code:      Country:

OK      Cancel

- > Enter the Users First Name and Last Name fields
- > Enter a complex password for the user profile

**Note: This password works with the Broadsoft user ID and is used to log into Broadsoft applications such as UC-One Communicator, Receptionist Console and Call Centre Agent and Supervisor**

Service Provider > Apex Designs

Options:

- Profile
- Resources
- Services
- Calling Plan
- Communication Barring
- Utilities

### Users Add

Add a new user to your group.

Service Provider: DemoReseller      Group: Apex Designs

\* User ID: 0385480606 @ pbx.vocus.net

\* Last Name: McCartney      \* First Name: Paul

\* Calling Line ID Last Name: (GMT) (UK) London Time      \* Calling Line ID First Name: Paul

Name Dialing Last Name: (GMT+08:00) Australia/Western Australia      Name Dialing First Name:

(GMT+09:30) Australia/Northern Territory      \* Re-type Initial Password: \*\*\*\*\*

(GMT+10:00) Australia/Queensland      Language: English

(GMT+10:30) Australia/South Australia      Network Class of Service: None

(GMT+11:00) Australia/New South Wales/ACT      Department: None

(GMT+11:00) Australia/Tasmania      Time Zone: (GMT+11:00) Australia/Victoria

(GMT+13:00) New Zealand/Auckland/Wellington

(GMT-05:00) (US) Eastern Time

(GMT-05:00) US Indiana

(GMT-06:00) (US) Central Time

(GMT-07:00) (US) Mountain Time

(GMT-07:00) US Arizona

(GMT-08:00) (US) Pacific Time

Additional Information

Title:      Mobile:      Pager:      YahooID:      E-mail:      Location:      Address:      City:      State/Province: -- Select --      Zip/Postal Code:      Country:

OK      Cancel

- > Select the correct **Time Zone** for the user
- > This will ensure time scheduling works correctly and that the correct time displays on your handset
- > Click **OK**

**The user profile has now been created**

### Users

Add a new user or manage existing users in your department or group.

OK      Add      Cancel

Enter search criteria below

User ID      Starts With      Search

OK      Add      Cancel

- > Search for the User profile

**Users**  
Add a new user or manage existing users in your department or group.

OK Add Cancel

Enter search criteria below

User ID ▾ Starts With ▾ + Search

User ID	Last Name	First Name	Phone Number	Extension	Department	In Trunk Group	Edit
0385480605@pbx.vocus.net	Lennon	John	+61-385480605	0605			Edit
0385480606@pbx.vocus.net	McCartney	Paul	+61-385480606	0606			Edit
0385480607@pbx.vocus.net	Harrison	George	+61-385480607	0607			Edit

[ Page 1 of 1 ]

OK Add Cancel

- > Click Edit to access the user's profile

## ASSIGN A HOSTED PBX LICENCE TO A USER

You are now ready to assign a Hosted PBX Licence to a user

Service Provider >Apex Designs >Users : 0385480606@pbx.vocus.net

Options:

- Profile
- Outgoing Calls
- Call Control
- Calling Plans
- Messaging
- Utilities

**Profile**

**Basic**

**Profile**  
Display and configure profile information such as your name, department and address.

**Addresses**  
Addresses allows you to view and maintain your phone numbers and other identities that are used to make and receive calls.

**Announcement Repository**  
Manage the announcements for a user

**Passwords**  
Set web access and portal passwords.

**Schedules**  
Add, modify, or remove schedules.

**Advanced**

**Assign Services**  
Assign or unassign services and service packs.

**Call Application Policies**  
Select Call Control Applications enabled for a user.

**Call Policies**  
Configure user Call Policies

**Call Processing Policies**  
Configure user-level Call Processing Policies

**Communication Barring Auth Codes**  
Configure Communication Barring Authorization codes

**Device Policies**  
Configure user Device Policies.

- > From the **Profile** menu, select **Assign Services**

Service Provider >Apex Designs >Users : 0385480606@pbx.vocus.net

Options:

- Profile
- Outgoing Calls
- Call Control
- Calling Plans
- Messaging
- Utilities

**Assign Services**

Assign Services allows you to assign or unassign services and service packs for a user. If a service or service pack is unassigned the service data that has been filled out will be lost.

OK Apply Cancel

**Available Service Packs**

Business Communicator - Premium

Add >

Remove <

Add All >>

Remove All

**User Service Packs**

**Available Services**

Add >

Remove <

Add All >>

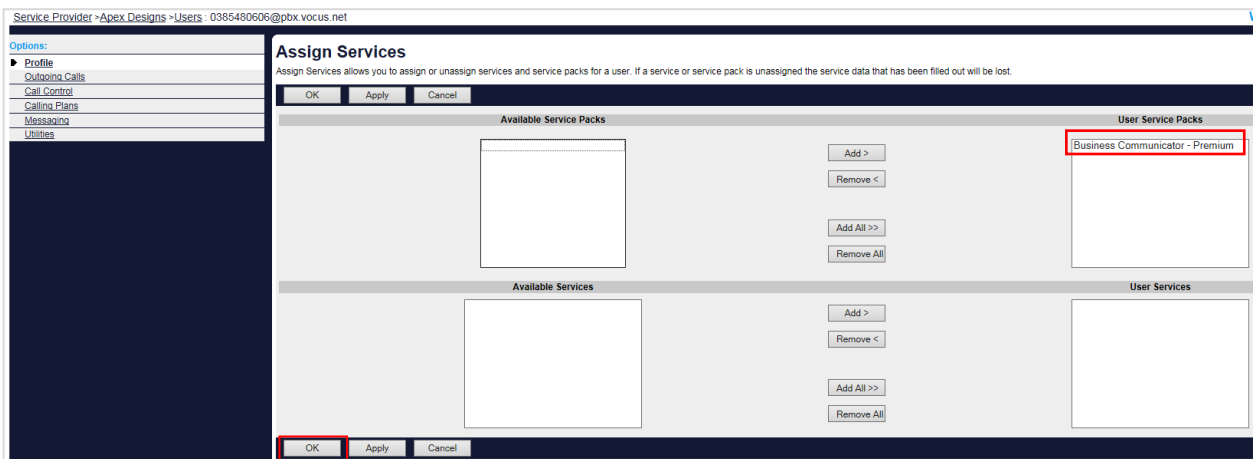
Remove All

**User Services**

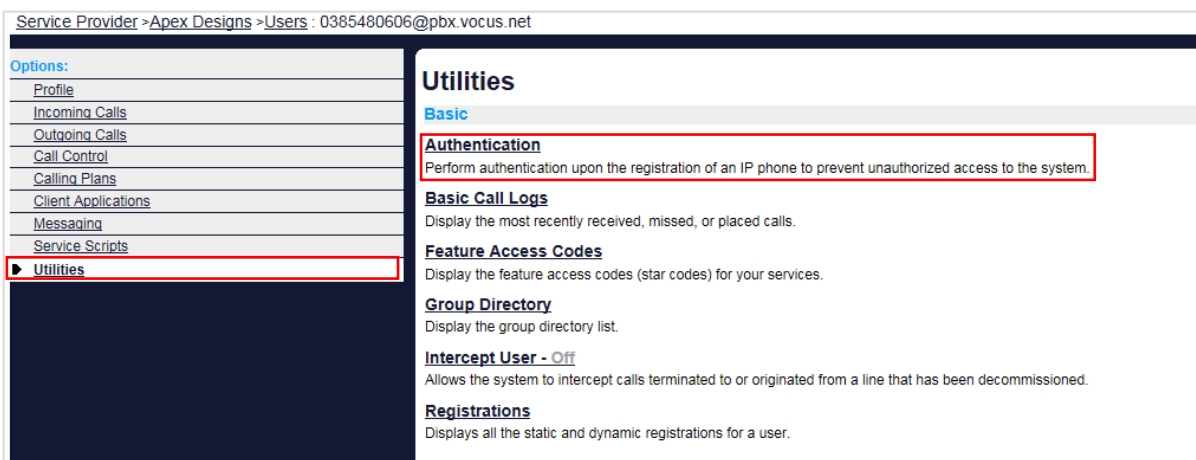
OK Apply Cancel

- > Select the Service Pack then click Add to assign to the user

**Note: Hosted PBX licenses are referred to as Service Pack with the CommPilot portal**



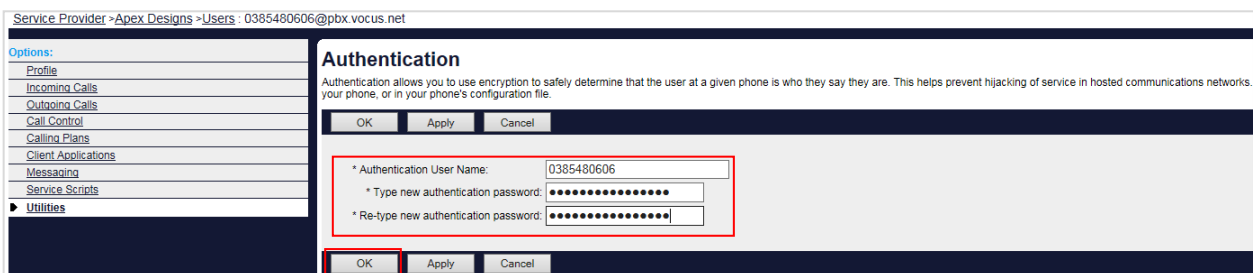
- > Click **OK**



**For security purposes always ensure a Hosted PBX license is assigned to a user profile as this will activate the SIP Authentication feature**

**To check the Authentication feature:**

- > Click **Utilities** from the Options menu
- > Then click **Authentication**



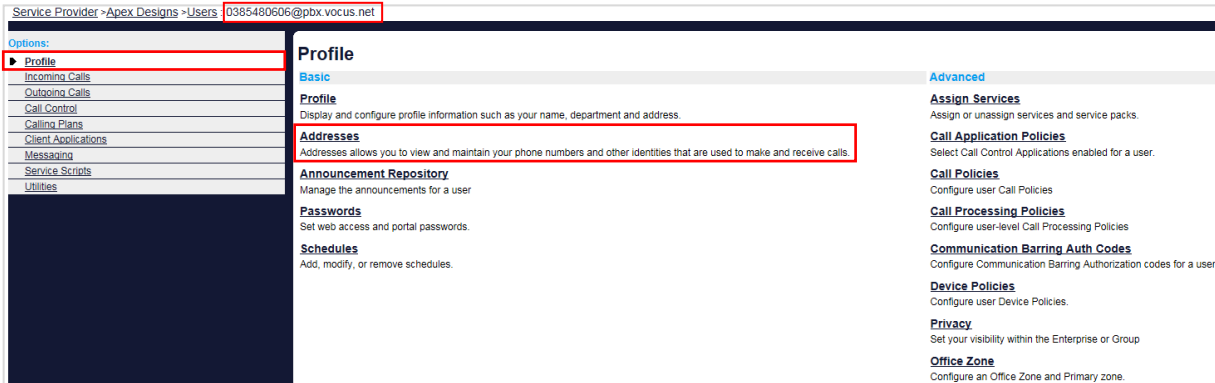
**Vocus recommends using the full phone number for the Authentication user name, or if using an extension use the customer name followed by the extension number**

- > Enter a complex **Password**
- > Click **OK**

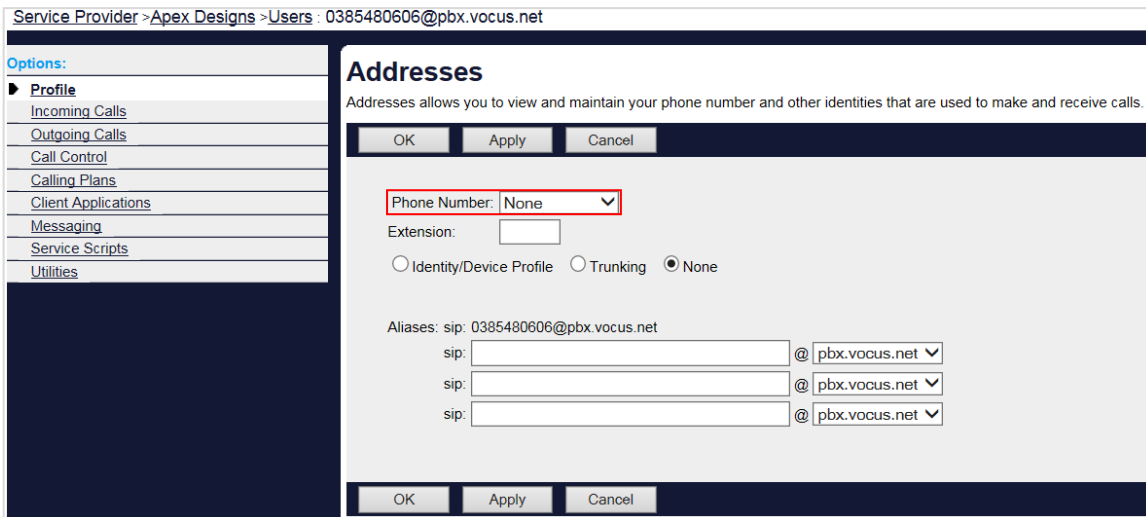
**Note 1: This is mandatory and must be a minimum of 16 characters using a random combination of a Uppercase and Lower case letters, numbers and characters**

# CONFIGURE PHONE NUMBER AND POLYCOM DEVICE PROFILE

The Device Profile and the phone number need to be configured for the user

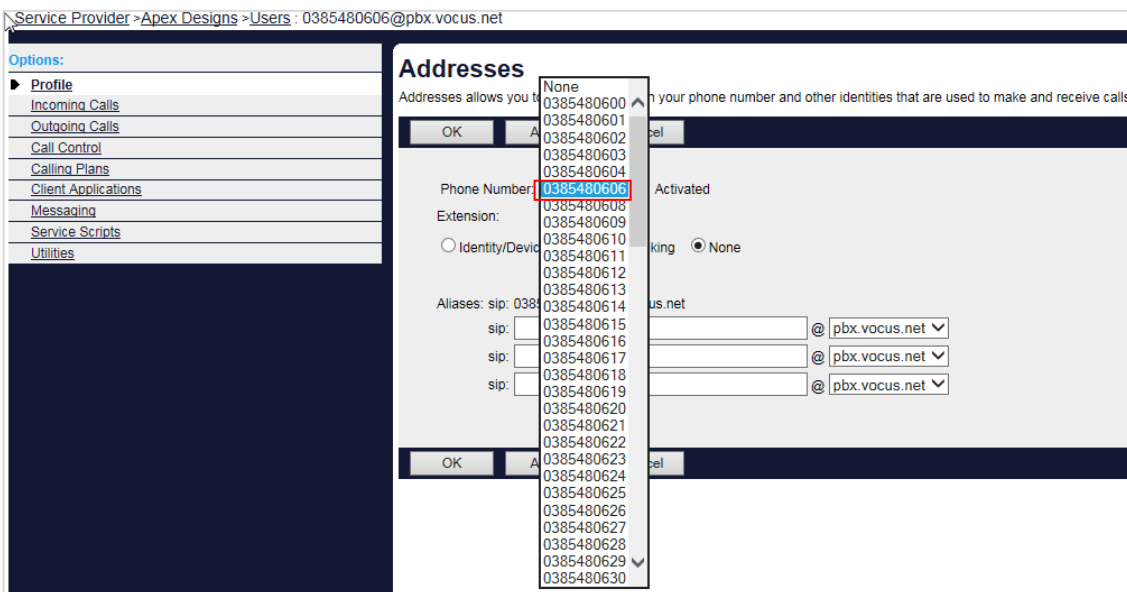


> From the **User > Profile** menu, select **Addresses**



*This where we establish the phone number*

> Select the Phone Number dropdown



> Choose the appropriate phone number

Service Provider > Apex Designs > Users : 0385480606@pbx.vocus.net

**Options:**

- Profile
  - Incoming Calls
  - Outgoing Calls
  - Call Control
  - Calling Plans
  - Client Applications
  - Messaging
  - Service Scripts
  - Utilities

### Addresses

Addresses allows you to view and maintain your phone number and other identities that are used to make and receive calls.

OK Apply Cancel

Phone Number: 0385480606 Activated

Extension: 0606

Identity/Device Profile  Trunking  None

Identity/Device Profile

Identity/Device Profile Name: 00121234 1234 (Group)

\* Line/Port: 00121234 1235 (Group) pbx.vocus.net

0385480605 (Group)

Codian\_MCU (System)

MediaServers (System)

New Identity/Device Profile (Group)

Aliases: sip: 0385480606@pbx.vocus.net

sip: @ pbx.vocus.net

sip: @ pbx.vocus.net

sip: @ pbx.vocus.net

OK Apply Cancel

> Change the extension number if required

**Vocus recommends leaving the extension number to match the last 4 digits of the full number**

> Select **Identity/Device Profile**

> From the dropdown, select **New/Identity Device Profile**

Service Provider > Apex Designs > Users : 0385480606@pbx.vocus.net

**Options:**

- Profile
  - Incoming Calls
  - Outgoing Calls
  - Call Control
  - Calling Plans
  - Client Applications
  - Messaging
  - Service Scripts
  - Utilities

### Addresses

Addresses allows you to view and maintain your phone number and other identities that are used to make and receive calls.

OK Apply Cancel

Phone Number: 0385480606 Activated

Extension: 0606

Identity/Device Profile  Trunking  None

Identity/Device Profile

Identity/Device Profile Name: New Identity/Device Profile (Group)

\* New Identity/Device Profile Name:

Identity/Device Profile Type: Polycom Soundpoint IP 300 - Autoconfig

Host Name/IP Address: Polycom Soundpoint IP 430 - Autoconfig

MAC Address: Polycom Soundpoint IP 6000 - Autoconfig

\* Line/Port: Polycom Soundpoint IP 650 - Autoconfig

Aliases: sip: 0385480606@pbx.vocus.net

sip: @ pbx.vocus.net

sip: @ pbx.vocus.net

sip: @ pbx.vocus.net

OK Apply Cancel

Port: AdvancedSettings

Polycom VVX Series

Polycom VVX1500 - Autoconfig

Polycom\_SPIP335

Polycom\_SPIP450

Polycom\_SPIP550

Polycom\_SPIP650

Polycom\_S SIP5000

Polycom\_S SIP6000

Polycom\_S SIP7000

Polycom\_VVX1500

Polycom\_VVX300

Polycom\_VVX310

Polycom\_VVX400

Polycom\_VVX410

Polycom\_VVX500

Polycom\_VVX600

Reliance VVX500

Sagemcom Fast 3184

Sinura SPA-2000

> Enter the **New Identity Device/Profile Name**

**Note: Vocus recommends using the MAC address**

> From the **New Identity Device/Profile type** dropdown list, navigate to and select the Polycom device you wish to auto provision

**In this demonstration we are provisioning a Polycom VVX 500 handset**



Service Provider > Apex Designs > Users : 0385480606@pbx.vocus.net

**Options:**

- Profile
- Incoming Calls
- Outgoing Calls
- Call Control
- Calling Plans
- Client Applications
- Messaging
- Service Scripts
- Utilities

### Addresses

Addresses allows you to view and maintain your phone number and other identities that are used to make and receive calls.

OK Apply Cancel

Phone Number: 0385480606 Activated  
 Extension: 0606

Identity/Device Profile  Trunking  None

Identity/Device Profile

Identity/Device Profile Name: New Identity/Device Profile (Group) ▾  
 \* New Identity/Device Profile Name: 0012112341234  
 Identity/Device Profile Type: Polycom\_VVX500 ▾

Host Name/IP Address: \_\_\_\_\_ Port: \_\_\_\_\_

MAC Address: 001211234123

\* Line/Port: \_\_\_\_\_ @ pbx.vocus.net ▾

Aliases: sip: 0385480606@pbx.vocus.net

sip: \_\_\_\_\_ @ pbx.vocus.net ▾  
 sip: \_\_\_\_\_ @ pbx.vocus.net ▾  
 sip: \_\_\_\_\_ @ pbx.vocus.net ▾

OK Apply Cancel

Always leave the **Host Name/IP Address** and **Port** field blank

> Enter the MAC address into the **MAC Address** field

**Note 1:** Ensure the MAC address is entered with uppercase letters and is 12 characters in length. If you don't have access to the MAC address at the time of provisioning, it is OK to leave this field blank.

**Note 2:** You will however need to add the MAC address to this field at a later date for the handset to provision properly

Service Provider > Apex Designs > Users : 0385480606@pbx.vocus.net

**Options:**

- Profile
- Incoming Calls
- Outgoing Calls
- Call Control
- Calling Plans
- Client Applications
- Messaging
- Service Scripts
- Utilities

### Addresses

Addresses allows you to view and maintain your phone number and other identities that are used to make and receive calls.

OK Apply Cancel

Phone Number: 0385480606 Activated  
 Extension: 0606

Identity/Device Profile  Trunking  None

Identity/Device Profile

Identity/Device Profile Name: New Identity/Device Profile (Group) ▾  
 \* New Identity/Device Profile Name: 0012112341234  
 Identity/Device Profile Type: Polycom\_VVX500 ▾

Host Name/IP Address: \_\_\_\_\_ Port: \_\_\_\_\_

MAC Address: 001211234123

\* Line/Port: 0385480606 @ pbx.vocus.net ▾

Aliases: sip: 0385480606@pbx.vocus.net

sip: \_\_\_\_\_ @ pbx.vocus.net ▾  
 sip: \_\_\_\_\_ @ pbx.vocus.net ▾  
 sip: \_\_\_\_\_ @ pbx.vocus.net ▾

OK Apply Cancel

> Enter the full 10 digit telephone number in the **Line/Port** field

> Click **OK**

**Note:** In the case where you are only assigning an extension number Vocus recommends using the customer name followed by the extension number

## PROVISION THE POLYCOM HANDSET

This section will demonstrate how to Provision a Polycom Handset

### Polycom Sound Point & VVX Series Handsets

#### Option 1 – DHCP Option 160

<https://polycom.phoneconfigs.com.au/bootstrap>

Separate Provisioning Server URL for pre version 4.x firmware

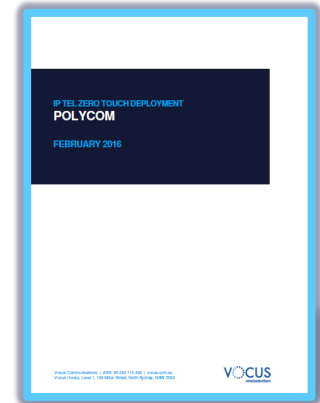
<http://polycom.phoneconfigs.com.au/upgrade>

#### Option 2 – Web Interface on Handset

Remotely access the administrator web interface of the handset from your computer's web browser

#### Option 3 – Manual Configuration on Handset

Enter the server settings directly using the alpha-numeric keypad on the physical handset.



- > There are 3 different methods available for directing your Polycom handset to the Vocus Provisioning server
- > Further information is provided in the Vocus Polycom Deployment guide document

#### Option 1 – DHCP Option 160

<https://polycom.phoneconfigs.com.au/bootstrap>

Separate Provisioning Server URL for pre version 4.x firmware

<http://polycom.phoneconfigs.com.au/upgrade>

**Option 1:** is the preferred method

- > Use a DHCP server to present DHCP Option 160 to the Polycom handset when it requests for an IP Address
- > If you have a Polycom handset running a firmware version below Version 4, you will need to use the Polycom upgrade provisioning server URL

#### Option 2 – Web Interface on Handset

- Navigate to Settings → Provisioning Server
- Enter the below parameters and click **Save**.
- This should cause the phone to reboot.

**Server Type:** HTTPS

**Server Address:** polycom.phoneconfigs.com.au/bootstrap

**Boot Server:** Static

**Boot Server Option:** 160

**Boot Server Type:** String

**Option 60 Format:** ASCII String



**Option 2:** This method requires you to remotely access the handset's web interface from a web browser

- > From your computer enter the IP address of the handset into your web browser then follow the above settings. The handset will then require a reboot.

**Option 3 – Manual Configure on Handset**

- On the Polycom Device select Settings → Advanced (enter admin password “456” ) → Administrator Settings → Network Configuration → Provisioning Server → Set the following parameters:

**Server Type:** HTTPS  
**Server Address:** polycom.phoneconfigs.com.au/bootstrap  
 ○ DHCP Menu  
**Boot Server:** Static  
**Boot Server Option:** 160  
**Boot Server Type:** String  
**Option 60 Format:** ASCII String



**Option 3:** This method requires you to configure the Vocus provisioning server address directly onto the handset using the alpha-numeric keypad

- > Enter the above parameters, then press **Save**. The phone will reboot

Once your Polycom handset establishes a connection to the Vocus DMS Provisioning Server it may reboot several times and undergo a firmware upgrade

**Note: Please do not disconnect or Power Off the handset during this process. This process may take up to 10 minutes as firmware upgrade may take place.**

**Polycom SoundPoint & VVX Series Supported Handsets**

Device Name	Device Profile Type	Supported firmware
Polycom SoundPoint IP 321	Polycom_SPIP335	4.1.1AA
Polycom SoundPoint IP 331	Polycom_SPIP335	4.1.1AA
Polycom SoundPoint IP 335	Polycom_SPIP335	4.1.1AA
Polycom SoundPoint IP 450	Polycom_SPIP450	4.1.1AA
Polycom SoundPoint IP 550	Polycom_SPIP550	4.1.1AA
Polycom SoundPoint IP 560	Polycom_SPIP560	4.1.1AA
Polycom SoundPoint IP 650	Polycom_SPIP650	4.1.1AA
Polycom SoundPoint IP 670	Polycom_SPIP650	4.0.9
Polycom SoundStation IP 5000	Polycom_SSIP5000	4.1.1AA
Polycom SoundStation IP 6000	Polycom_SSIP6000	4.0.9
Polycom SoundStation IP 7000	Polycom_SSIP7000	4.0.9
Polycom SoundStation IP DUO	Polycom_SSIPDUO	4.1.1AA
Polycom VVX 300	Polycom_VVX300	5.4.0
Polycom VVX 310	Polycom_VVX310	5.4.0
Polycom VVX 400	Polycom_VVX400	5.4.0
Polycom VVX 410	Polycom_VVX410	5.4.0
Polycom VVX 500	Polycom_VVX500	5.4.0

- > This table displays the Polycom handsets supported by Vocus DMS auto-provisioning and their corresponding Device Profile name within the BroadSoft CommPilot portal



- > Once the handset has been provisioned successfully, the extension number will appear on the handset
- > You can now test making and receiving calls

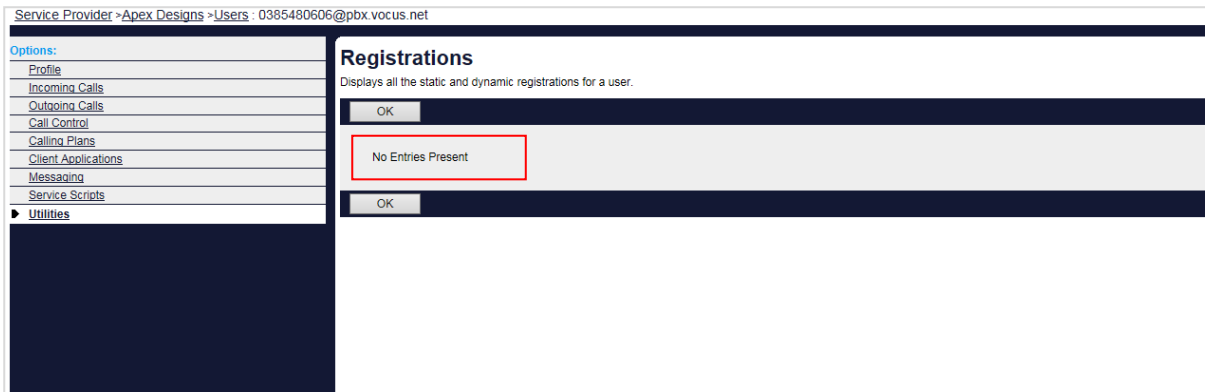
Service Provider > Apex Designs > Users : 0385480606@pbx.vocus.net

<b>Options:</b> <a href="#">Profile</a> <a href="#">Incoming Calls</a> <a href="#">Outgoing Calls</a> <a href="#">Call Control</a> <a href="#">Calling Plans</a> <a href="#">Client Applications</a> <a href="#">Messaging</a> <a href="#">Service Scripts</a> <b>▶ Utilities</b>	<h3>Utilities</h3> <p><b>Basic</b></p> <p><b>Authentication</b> Perform authentication upon the registration of an IP phone to prevent unauthorized access to the system.</p> <p><b>Basic Call Logs</b> Display the most recently received, missed, or placed calls.</p> <p><b>Feature Access Codes</b> Display the feature access codes (star codes) for your services.</p> <p><b>Group Directory</b> Display the group directory list.</p> <p><b>Intercept User - Off</b> Allows the system to intercept calls terminated to or originated from a line that has been decommissioned.</p> <p><b>Registrations</b> Displays all the static and dynamic registrations for a user.</p>
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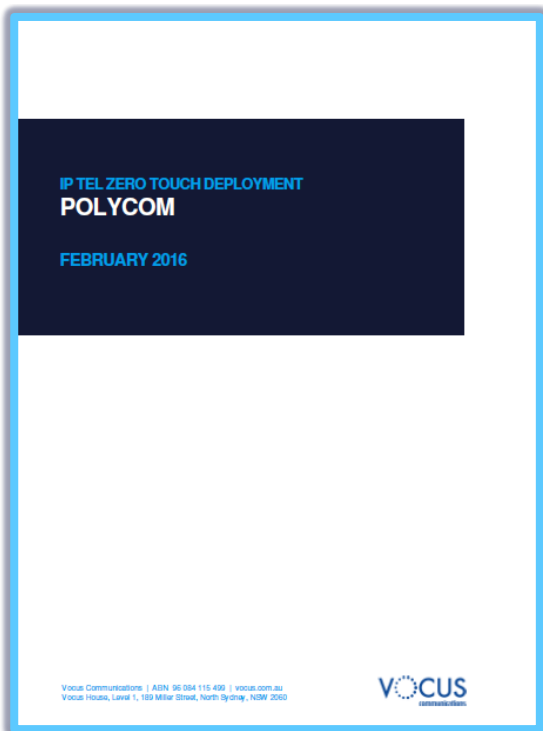
- > From the User Profile go to **Utilities**, then select **Registrations**

<b>Options:</b> <a href="#">Profile</a> <a href="#">Incoming Calls</a> <a href="#">Outgoing Calls</a> <a href="#">Call Control</a> <a href="#">Calling Plans</a> <a href="#">Client Applications</a> <a href="#">Messaging</a> <a href="#">Service Scripts</a> <b>▶ Utilities</b> <a href="#">Communication Barring</a>	<h3>Registrations</h3> <p>Displays all the static and dynamic registrations for a user.</p> <p>OK</p> <div style="border: 1px solid red; padding: 5px;"> <p>Endpoint Type: Primary            Line/Port: 0399880162@amcomvoice.ipsystems.com.au            Identity/Device Profile Name: 0004F2802369 ( Group )</p> <p>URI: sip:0399880162-6k9o3pfuggjif@202.147.128.220:5060;transport=udp            Expiration: Wed Feb 08 17:40:31 EST 2017            Public IP:            Public Port:            Private IP:            Private Port:            User Agent: PolycomVXX-VXX_500-UA/5.3.0.12074            Lockout Started:            Lockout Expires:            Lockout Count: 0</p> </div>
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- > This screen shows the device is registered successfully



- > If the handset has not registered successfully, this page will display **No Entries Present**



For more information on provisioning your Polycom Handset you can refer to the **Vocus Polycom Deployment Guide**

For further information go to [www.vocus.com.au](http://www.vocus.com.au) or contact your Account Manager