

Using My Site

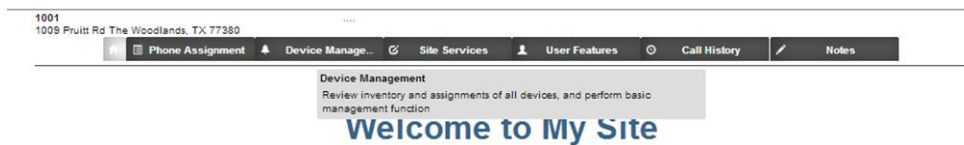
My Site Dashboard Overview

The My Site dashboard provides the BroadCloud PBX customer Administrator a portal for managing users, features, and devices for a specific site. This tool also provides a reporting mechanism for call history, as well as a notes facility.

General Use Tips

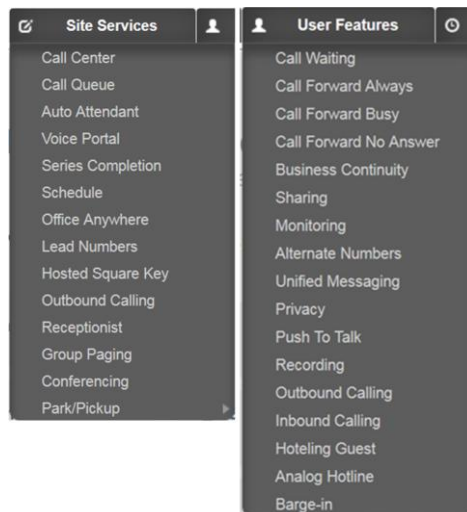
Common elements throughout the My Site layout:

Menu tabs with icon and hover-over text



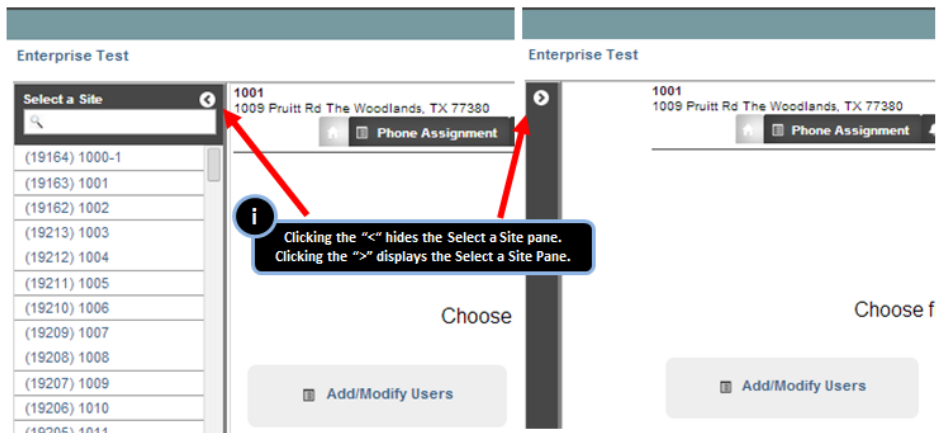
Drop-down Menus

For the Site Services and User Features, quickly navigate to the specific feature you are managing.



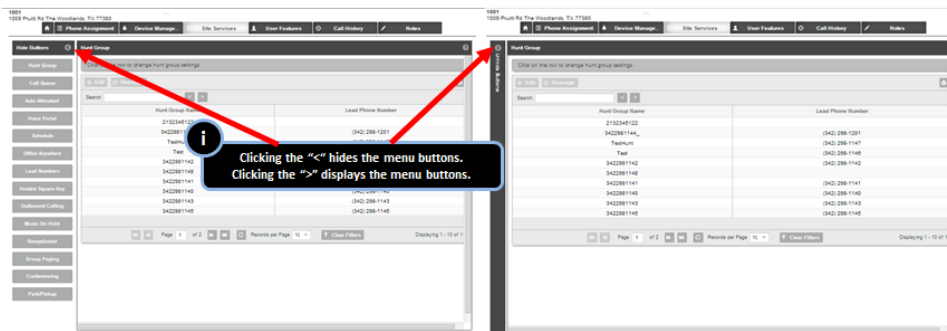
Collapsible site list

Hide or display the site selection list.



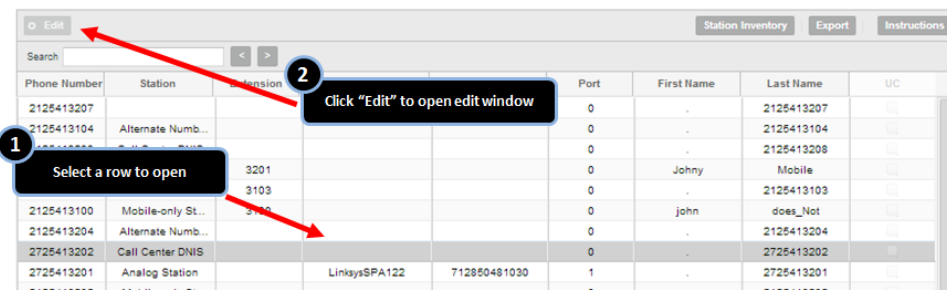
Collapsible left-hand menu

For tabs with menu buttons on the left side of the panel, hide or display these selections as needed.



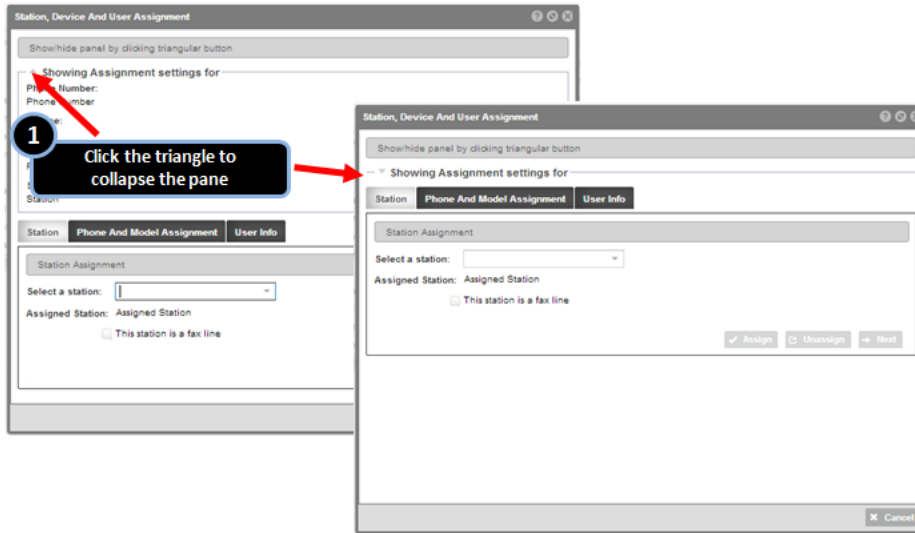
Consistent method of opening line items for editing

When presented with multiple line items, users select the row for that item, then click the edit button.



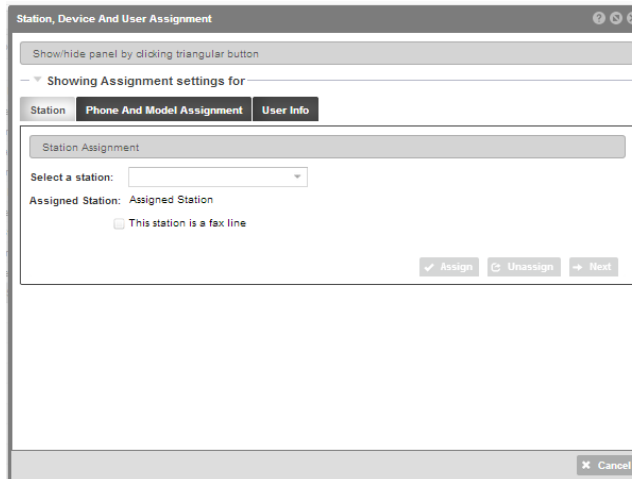
Collapsible editing panes

Conserve screen space by hiding the editing pane.



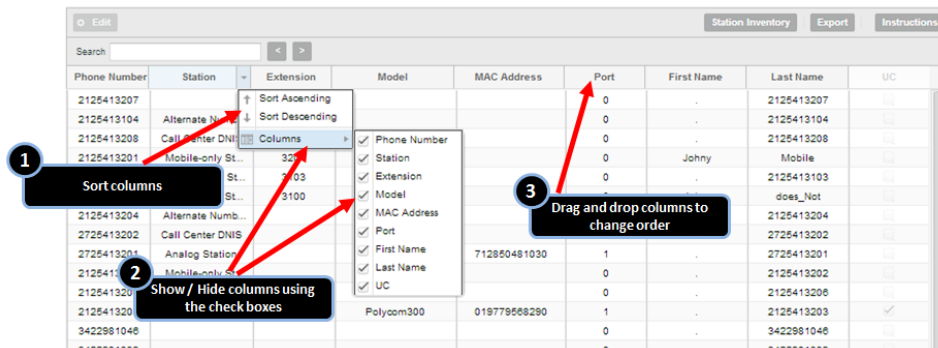
Tabbed panes in editing windows

Clearly labeled and usable means of selecting different panes within editing screens.

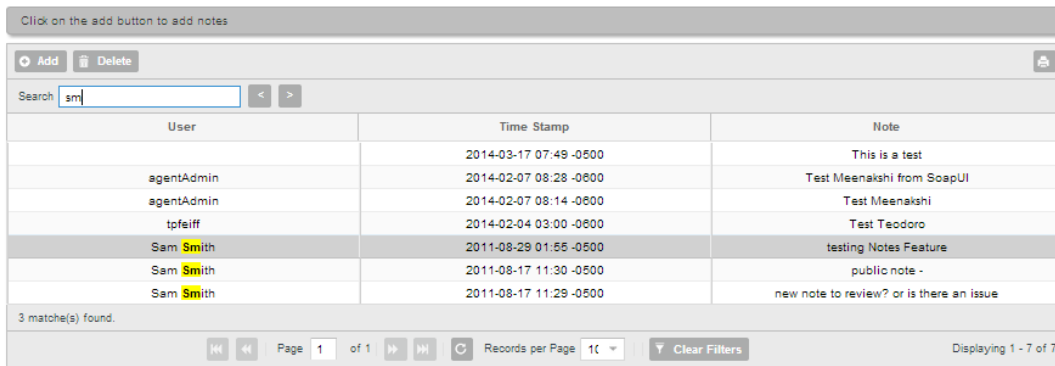


Customizable table view

Sort, show/hide, or rearrange order of columns in a table.

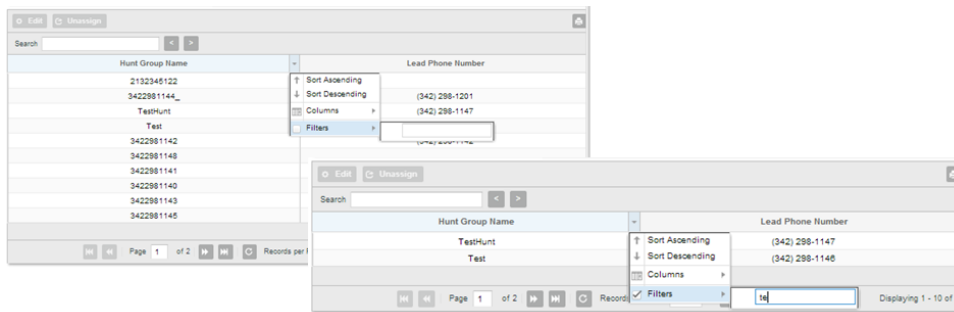


Search table




Filter columns

Filter contents of the column. Uses fuzzy logic to find the text search string anywhere within the table. Clear filters resets the view.

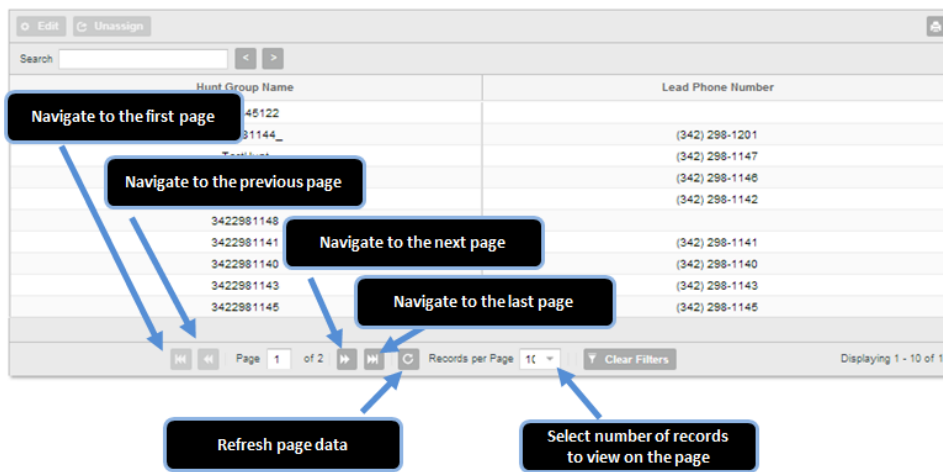


On-screen help.

Find help with the feature/function you are performing by clicking the  button.

Manage Table size, page viewed, and refresh data

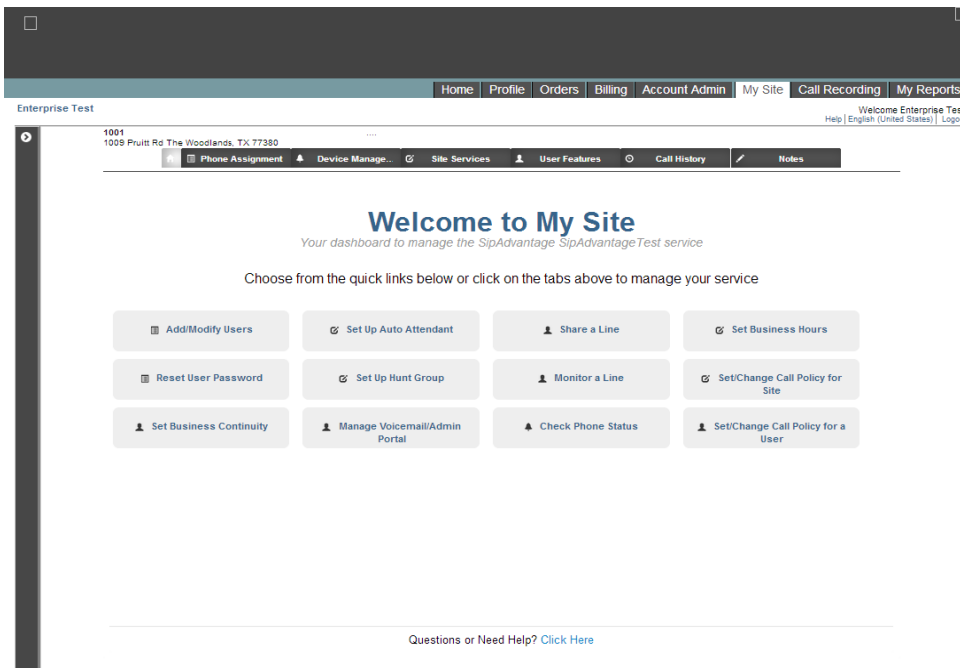
Select number of records to view, navigate page number, and refresh table data.



Overview of Menu Tabs

Home

Quick links to common tasks



Phone Assignment

Create users and assign them telephone numbers, stations, and phones. Manage user profiles, extension, and reset passwords. Bulk site assignment functions are available.

The screenshot shows the 'Phone Assignment' interface with a table of phone records. The table has columns for Phone Number, Station, Extension, Model, MAC Address, Port, First Name, Last Name, and UC. The record for phone number 2125413203 is highlighted, showing it is an Executive Station with extension 3203, model Polycom300, and MAC address 019779568290.

Phone Number	Station	Extension	Model	MAC Address	Port	First Name	Last Name	UC
2125413207					0	.	2125413207	
2125413104	Alternate Numb...				0	.	2125413104	
2125413208	Call Center DNIS				0	.	2125413208	
2125413201	Mobile-only St...	3201			0	Johny	Mobile	
2125413103	Loudspeaker St...	3103			0	.	2125413103	
2125413100	Mobile-only St...	3100			0	john	does_Not	
2125413204	Alternate Numb...				0	.	2125413204	
2725413202	Call Center DNIS				0	.	2725413202	
2725413201	Analog Station		LinksysSPA122	712850481030	1	.	2725413201	
2125413202	Mobile-only St...				0	.	2125413202	
2125413206	Call Center DNIS				0	.	2125413206	
2125413203	Executive Station	3203	Polycom300	019779568290	1	.	2125413203	✓
3422981046					0	.	3422981046	
3422981089					0	.	3422981089	
3422981050					0	.	3422981050	
3422981074					0	.	3422981074	
3422981109					0	.	3422981109	
3422981110					0	.	3422981110	
3422981045					0	.	3422981045	
3422981115					0	.	3422981115	
3422981059					0	.	3422981059	

Device Management

View list of phones and clients assigned to the site. Manage and view status of phones.

The screenshot shows the 'Device Management' interface with a list of devices. The list includes device names, MAC addresses, phone numbers, and types. The devices listed are Polycom WX 300, Business Communicator - PC, Polycom WX 400, Cisco SPA 122, Business Communicator - Mobile, Polycom WX 500, and Polycom WX 600.

Device	MAC	Phone Number	Type	Detail
▶ Polycom WX 300				
▶ Business Communicator - PC				
▶ Polycom WX 400				
▶ Cisco SPA 122				
▶ Business Communicator - Mobile				
▶ Polycom WX 500				
▶ Polycom WX 600				

Site Services

Configure and manage services, features, and calling plans available to the site.

The screenshot shows the 'Call Queue' management interface. At the top, there is a navigation bar with tabs for Phone Assignment, Device Manage..., Site Services (selected), User Features, Call History, and Notes. On the left side, there is a vertical menu with buttons for: Hide Buttons, Hunt Group, Call Queue, Auto Attendant, Voice Portal, Schedule, Office Anywhere, Lead Numbers, Hosted Square Key, Outbound Calling, Music On Hold, Receptionist, Group Paging, Conferencing, and Park/Pickup. The main content area is titled 'Call Queue' and contains a table with the following data:

Call Queue Name	Lead Phone Number	Extension	Policy	Active
3422981165	3422981165	1165	Weighted	<input checked="" type="checkbox"/>
3422981160		4455	Simultaneous	<input checked="" type="checkbox"/>
3422981169	3422981169	1169	Regular	<input checked="" type="checkbox"/>
3422981150	3422981150	1150	Regular	<input checked="" type="checkbox"/>
3422981159	3422981159	1159	Regular	<input checked="" type="checkbox"/>
3422981164	3422981164	1164	Regular	<input checked="" type="checkbox"/>
3422981155	3422981155	1155	Regular	<input checked="" type="checkbox"/>
3422981162	3422981162	1162	Regular	<input checked="" type="checkbox"/>
3422981156	3422981156	1156	Regular	<input checked="" type="checkbox"/>
3422981153	3422981153	1153	Regular	<input checked="" type="checkbox"/>

Below the table, there is a pagination control showing 'Page 1 of 2', 'Records per Page 10', and 'Clear Filters'. The status 'Displaying 1 - 10 of 21' is also visible.

User Features

Edit features and calling plans for specific users on the site.

The screenshot shows the 'Call Waiting' user feature management interface. At the top, there is a navigation bar with tabs for Phone Assignment, Device Manage..., Site Services, User Features (selected), Call History, and Notes. On the left side, there is a vertical menu with buttons for: Call Waiting, Call Forward Always, Call Forward Busy, Call Forward No Answer, Business Continuity, Sharing, Monitoring, Alternate Numbers, Unified Messaging, Privacy, Push To Talk, Outbound Calling, Inbound Calls, Transportable Profile, and Analog Hotline. The main content area is titled 'Call Waiting' and contains a table with the following data:

First Name	Last Name	Phone Number	Extension	Call Waiting
21	35	2123901135	1135	<input checked="" type="checkbox"/>
.	2125413203	2125413203	3203	<input type="checkbox"/>
Antu	2125413200	2125413200	3200	<input type="checkbox"/>
.	2725413204	2725413204	3204	<input type="checkbox"/>
.	2725413201	2725413201		<input type="checkbox"/>
.	3232122133	3232122133	2133	<input type="checkbox"/>
.	3422981035	3422981035	1035	<input checked="" type="checkbox"/>
.	3422981062	3422981062	1062	<input checked="" type="checkbox"/>
.	3422981024	3422981024	1024	<input checked="" type="checkbox"/>
.	3422981104	3422981104	1104	<input checked="" type="checkbox"/>

Below the table, there is a pagination control showing 'Page 1 of 3', 'Records per Page 10', and 'Clear Filters'. The status 'Displaying 1 - 10 of 21' is also visible.

Call History

View call history data for users and numbers on the site. Call history can be exported for analysis and use apart from the dashboard.

Select a row and click the toolbar button(s) to change settings

Search

Phone Number

- 2725413203
- 2132345122
- 2123901138
- 2123901130
- 2123901135
- 2123901136
- 2125413100
- 2125413104
- 2125413101
- 2125413102
- 2125413103
- 2125413201
- 2125413204
- 2125413202
- 2125413206
- 2125413203
- 2125413208
- 2125413207
- 2125413200
- 2725413202
- 2725413201
- 2725413200

Start Date Start Time Calling Number Called Number callerID Min City State Zip T

Notes

Add and edit notes for administrators on the site.

Click on the add button to add notes

Add Delete

Search

User	Time Stamp	Note
	2014-03-17 07:49 -0500	This is a test
agentAdmin	2014-02-07 08:28 -0600	Test Meenakshi from SoapUI
agentAdmin	2014-02-07 08:14 -0600	Test Meenakshi
tpfeiff	2014-02-04 03:00 -0600	Test Teodoro
Sam Smith	2011-08-29 01:55 -0500	testing Notes Feature
Sam Smith	2011-08-17 11:30 -0500	public note -
Sam Smith	2011-08-17 11:29 -0500	new note to review? or is there an issue

Page 1 of 1 Records per Page 10 Clear Filters Displaying 1 - 7 of 7