

Cisco Unified Communications UC320W Pre-Installation Site Information

Use this workbook to gather information from your customer before you install the Cisco Unified Communications UC320W at the site. You can save time by referring to this workbook when you set up the system.

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Formats Used in this Workbook

For Your Information: The following formats are used:

- Bold type indicates a list of options. Circle one option.
- System default settings are shown in parentheses or are indicated by the symbol ✓. If you are using the system default settings, the configuration process will go very quickly.

Site Information

NOTE This section is provided for your convenience and is not required by the system.

Company Contacts

Contact - Commercial

Name: _____

Job Title: _____

Phone: _____

Email: _____

Alt. Contact Phone: _____

Contact - IT Responsible

Name: _____

Job Title: _____

Phone: _____

Email: _____

Alt. Contact Phone: _____

Installation Information

Address: _____

City, State ZIP: _____

Installation Schedule Date: _____

Site Survey Date and Method

Survey Date: _____ By (your name): _____

Survey Method: Circle one. **On Site** **By Phone**

Service Provider Information

	Internet Service Provider	PSTN Service Provider (Analog Trunks)	SIP/BRI Service Provider (Voice over IP Service)
SP Name			
SP Contact Information			
Service Order Number			
Service Order Type			
Service Activation Date			
Account Number			

Administrator Login

New Administrator Username for UC320W: _____ (Neither *cisco* nor *admin* is allowed.)

New Password for UC320W: _____ (Include lowercase and uppercase letters and numbers. Neither *cisco* nor *admin* is allowed.)

DHCP Server Information (Network Topology)

Will the site use the Cisco UC320W as the DHCP server (default setting), or another device? Circle one.

UC320W routes Voice and Data

UC320W routes Voice Only

**UC320W routes Voice and Data with
External DHCP Server
(ex. Windows SBS)**

IMPORTANT: If another device acts as the DHCP server, choose the appropriate network topology to disable the DHCP server in the Cisco UC320W before adding it to the network. These steps are required to prevent address conflicts and to avoid network problems. (For more information, see the Smart Designs at www.cisco.com/go/partner/smartdesigns)

WAN Connection

Estimated Uplink Bandwidth: Circle one. **128k** **256k** **384k** **512k** **768k** **1M** **2M** **4M**

In the table on the following pages, find the correct WAN Type (IP addressing type) in the first column. Provide the required information for the selected type. Provide any optional information that is available from the customer's Internet Service Provider.

NOTE If you are adding UC320W to a Windows Small Business Server environment, choose DHCP for the WAN type.

WAN Type Circle one:	Required information for selected type Enter all required information.	Optional information Enter if available.
DHCP ✓	(No required information.)	Domain Name: _____
Static IP	IP Address: _____ Subnet Mask: _____ Default Gateway: _____ Primary DNS: _____	Secondary DNS: _____ Domain Name: _____
PPPoE (DSL)	Username: _____ Password: _____ Connection: Circle one. Keep Alive ✓ Connect on Demand For Connect on Demand, enter Max Idle Time: _____ minutes	Service Name: _____ Domain Name: _____
PPTP DHCP or L2TP DHCP	Username: _____ Password: _____ Server IP: _____ Connection: Circle one. Keep Alive ✓ Connect on Demand For Connect on Demand, enter Max Idle Time: _____ minutes	Domain Name: _____

WAN Type Circle one:	Required information for selected type Enter all required information.	Optional information Enter if available.
PPTP Static or L2TP Static	Username: _____ Password: _____ IP Address: _____ Subnet Mask: _____ Default Gateway: _____ Primary DNS: _____ Server IP: _____ Connection: Circle one. Keep Alive ✓ Connect on Demand For Connect on Demand, enter Max Idle Time: _____ minutes	Secondary DNS: _____ Domain Name: _____

Devices

Optionally, note the model numbers and the quantity of devices that you intend to install. (These notes are not required. The system will automatically discover the connected devices. You can list the phones for each user in [User Information and Phone Assignments, page 16](#).)

Quantities to order:

SPA IP Phones and Attendant Consoles (note phone models and quantities):

SPA 8800 Gateways (note quantity): _____

Optional equipment:

- USB Flash Key (2GB or larger, FAT32 format) for backups

- Cisco ESW500 Series switches

Regional Settings

You can use default regional settings or customized settings. If custom, enter the desired option in the space provided.

Region: _____

Time Zone: _____

Use Daylight Savings Time? Circle one. **Yes** ✓ **No**

System Access

Enable remote management (WAN access)? Circle one. **Yes** **No** ✓

Port: **Use Default (8080)** or **Use this port:** _____

Enable wireless management from PC connected to wireless network? Circle one. **Yes** **No** ✓

Automatic Maintenance

Maintenance Window

Choose a maintenance window that is least disruptive for your users.

Time: _____ Day: _____

USB Backup

Enable automatic configurations backup to USB? Circle one. **Yes** **No** ✓

Time: _____ Day: _____

Note: This feature requires a USB Flash Key (2GB or larger, FAT32 format), not included.

Telephony Settings

PBX/Key System

For Your Information: The following system modes are available:

- **Key System:** FXO trunks are associated with line buttons. A user hears dial tone after selecting a line button; no dialing digit is needed to get an outside line. All users can monitor and manage calls on these lines. There are no SIP/BRI trunks.
- **PBX:** Outbound calls go through any available trunk, after a user presses a digit such as 9. Extensions are independent, although shared extensions and hunt groups can be created. There are no shared FXO lines.
- **Blend:** The system has the features of a PBX and a key system.

Choose one: **Key System** **Blend** ✓ **PBX**

Day/Night Features

- **Call Routing:**
Choose one. **Same behavior for all hours** ✓ **Allow different options for open/closed hours (day/night)**
- **Auto Attendant:** Choose one. **Turn On** ✓ **Turn Off**

Choose one. **Single AA menu for all hours** ✓ **Different menus for open/closed hours (day/night)**
- **Call Forwarding:**
Choose one. **Same behavior for all hours** ✓ **Allow different options for open/closed hours (day/night)**
- **Schedule:** If you chose an Open/Closed (Day/Night) option above, indicate the schedule below.

Choose one.
 Manually trigger the open/closed (day/night) behavior through a Force Night button on a phone ✓
 Use an automated schedule (specify below)

Operating Hours Note the operating hours for each day of the week. (Example: Mon.-Fri.: 8-12, 1-6. Sat.: 11-5. Sun.: Closed.)

Holiday Date	Holiday Description
Enter dates when business is closed.	Enter a short description. Also note if the holiday occurs yearly on the same date.

Internal Dialing

Extension Length: Circle one. **2 digits** **3 digits ✓** **4 digits**

Allowed Dial Patterns:

For your information: Options for First Dialed Digit

- **Dial Immediately:** The digit is used as a one-digit extension number. For example, in the default settings, a user can press 0 to immediately dial the Auto Attendant.
- **Extensions:** The digit is used as the first digit of an extension number. You may want to use different extension numbers for different types of extensions. For example, in the default settings, 1 is the first digit in personal extensions (100, 100, 101...) and 2 is the first digit in shared extensions.
- **Voicemail Prefix:** The digit is used as a prefix to dial into voice mail. For example, in the default settings, you press 7 101 to connect to the voicemail box for mailbox 101.
- **Outside Line:** The digit is used to place an outbound call. For each digit with this function, you will specify the FXO (analog) line or SIP/BRI service to use. For example, in the default settings, you press 9 to get an outside line, and then you dial the phone number.
- **Not Allowed:** This digit cannot be used as the first digit when dialing.

Digit	Purpose Circle the default setting, or enter a different option (see notes above this table).
0	Use Default (Dial Immediately) or Use this option: _____
1	Use Default (Extensions) or Use this option: _____
2	Use Default (Extensions) or Use this option: _____
3	Use Default (Extensions) or Use this option: _____
4	Use Default (Not Allowed) or Use this option: _____
5	Use Default (Not Allowed) or Use this option: _____
6	Use Default (Not Allowed) or Use this option: _____
7	Use Default (Voice Mail Prefix) or Use this option: _____

Digit	Purpose
	Circle the default setting, or enter a different option (see notes above this table).
8	Use Default (Outside Line) or Use this option: _____
9	Use Default (Outside Line) or Use this option: _____

Extensions for System Features:

System Feature	Extension Number
	Keep the default # or enter a # in the space.
Auto Attendant	Use Default (0) or Use this #: _____
Auto Attendant Prompt Recorder	Use Default or Use this #: _____
Voicemail Pilot	Use Default or Use this #: _____
External Page (if an external speaker system is connected)	Use Default or Use this #: _____
Music	Use Default or Use this #: _____

Dialing Restriction (Classes)

Classes of restriction are used to prevent some users from making certain types of calls while allowing other users to do so. Dial patterns vary by region. Examples include long distance, international, operator, toll-free, premium, and directory inquiries. (To assign the users to these classes, see [Dialing Privileges, page 27](#).)

Class of Restriction	Description	Desired Dial Patterns
Full Privileges	The specified dial patterns are allowed only for the users in this class. These users also can use the dial patterns for the lower privilege levels.	Use Default or Allow these patterns for this class:
Expanded Privileges	The specified dial patterns are allowed only for the users in this class and above. These users also can use the dial patterns for Basic Privileges.	Use Default or Allow these patterns for this class:
Basic Privileges	The specified dial patterns are allowed for all users.	Use Default or Allow these patterns for this class:
Not Allowed	No one can place calls using these dial patterns.	

Music Settings

Music source: Circle one. **Use built-in music source** ✓ **Use an external music device**

Enable music for calls on hold? Circle one. **Yes** ✓ **No**

Enable music for parked calls? Circle one. **Yes** ✓ **No**

Extension: Choose one. **Use Default** or **Use this #:** _____

Ports and Trunks

FXO Ports for Analog Phone Lines

The total number of FXO ports to enable on UC320W and any SPA8800 telephony gateways: _____ (Default: all disabled)

NOTE The UC320W has 4 FXO ports to connect analog phone lines. You can connect up to two SPA8800 telephony gateways, which have 4 FXO ports each.

Descriptive labels. In the space below, provide a description or phone number to identify each FXO (analog) trunk.

FXS Ports for Analog Devices

Enable the built-in FXS port on the Unified Communications System? Circle one: **Yes ✓** **No**

Total number of FXS ports to enable on UC320W and any SPA8800 telephony gateways: _____ (Default: all disabled)

NOTE The UC320W has 1 FXS port where you can connect an analog phone or fax machine. For additional FXS ports, you can connect up to two SPA8800 telephony gateways, which have 4 FXS ports each.

SIP/BRI Trunks

Systemwide SIP parameters:

- System Codec Circle one. **G711A/G711U** **G729A**
- Outbound Fax Circle one. **Passthrough** **T-38**
- Packetization Size Circle one. **10** **20** **30** **40**

You can have a total of 4 SIP/BRI trunks. Enter the information in [SIP Provider Information, page 13](#) or the [Mediatrix Gateway Information, page 14](#).

SIP Provider Information

If you have SIP trunks, enter the required information and additional information from your SIP provider. (Your provider may have additional requirements beyond the minimum requirements specified below.) Space is provided below for one provider. Copy this page if you need to enter additional providers. You can configure up to four SIP/BRI trunks.

Phone Numbers (Required)

Use the space below to enter individual phone numbers or ranges of numbers (example: 972555-0100 to 972555-0105).

Description for your reference **(Required)**: _____

Proxy IP Address or hostname **(Required)**: _____

Does the SIP proxy server require SIP registration? **Yes** ✓ **No**

Call Capacity **(Required)**: _____ (Default: 1)

Prefix dialed numbers with (local dialing prefix such as 1+ in US or 44+ in UK): Choose one. **Yes** **No** ✓

Your Customer's Company Name for Caller ID: _____

DID for Account ID **(Required)**: _____ (specified by your service provider)

SIP Domain Name for Domain Name Service: _____

Authentication ID for Digest Authentication: _____

Password for Digest Authentication: _____

Enable SRV Record Lookup? Choose one. **Yes** **No** ✓

Enable SRV Auto Prefix? Choose one. **Yes** **No** ✓

Enable NAT Mapping? Choose one. **Yes** **No** ✓

Send NAT Keep Alive? Choose one. **Yes** **No** ✓

Mediatrix Gateway Information

If you have Mediatrix gateways, enter all information below. You can have up to two Mediatrix BRI Gateways. You can have a total of 4 SIP/BRI trunks.

Gateway 1**Phone Numbers (Required)**

Use the space below to enter individual phone numbers or ranges of numbers. Do not use dashes or periods (example: 9725550100 to 9725550105).

Description for your reference **(Required)**: _____

Mediatrix IP Address **(Required)**: _____

Call Capacity **(Required)**: _____ (Default: 1)

Prefix dialed numbers with (local dialing prefix such as 1+ in US or 44+ in UK): Choose one. **Yes** **No ✓**

Gateway 2**Phone Numbers (Required)**

Use the space below to enter individual phone numbers or ranges of numbers. Do not use dashes or periods (example: 9725550100 to 9725550105).

Description for your reference **(Required)**: _____

Mediatrix IP Address **(Required)**: _____

Call Capacity **(Required)**: _____ (Default: 1)

Use 1+ Dialing: _____

Outbound Trunks

For each digit that you selected for Outside Line, specify the trunk to be used. If using more than one trunk, specify the order.

For Outside Line Digit: _____

Use these trunks in this order:

For Outside Line Digit: _____

Use these trunks in this order:

Emergency Calls

Are Emergency Calls supported by the service provider? Choose one. **Yes** **No ✓**

If Yes: Use these trunks in this order:

User Information and Phone Assignments

Enter the user information. Include FXS and unstaffed phones, such as Lobby Phone. Copy this page if you need to enter additional users. Note: The system allows you to paste a text file or to import a CSV file. To prepare a CSV file, include these four comma-separated values for each user: first name, last name, extension number (optional), and voicemail (true or false).

Name For an unstaffed phone, enter a description, such as Lobby.	Extension Use the default extension number or enter a number.	Voicemail and Email Options Enable or disable voicemail. Optionally, specify an email address for notifications.	Phone Model Enter the user's phone and side car requirements.
First Name: Last Name (surname): 	Use Default or enter #: _____	Enable voicemail? Yes ✓ No Email address (optional): _____	Model: _____ Side car? Yes No
First Name: Last Name (surname): 	Use Default or enter #: _____	Enable voicemail? Yes ✓ No Email address (optional): _____	Model: _____ Side car? Yes No
First Name: Last Name (surname): 	Use Default or enter #: _____	Enable voicemail? Yes ✓ No Email address (optional): _____	Model: _____ Side car? Yes No
First Name: Last Name (surname): 	Use Default or enter #: _____	Enable voicemail? Yes ✓ No Email address (optional): _____	Model: _____ Side car? Yes No
First Name: Last Name (surname): 	Use Default or enter #: _____	Enable voicemail? Yes ✓ No Email address (optional): _____	Model: _____ Side car? Yes No

Hot Phones

A hot phone is used exclusively to place a call to a specified target number. You can assign this function to two phones.

Name Keep the default name or enter a descriptive label.	Extension Use the default extension number or enter a number.	Target Extension or Phone Number	Phone Model Enter the user's phone and side car requirements.
Use Default Name: Hotphone 1 or enter label: _____	Use Default or enter #: _____	Enter extension or phone number: _____	Model: _____ Side car? Yes No
Use Default Name: Hotphone 2 or enter label: _____	Use Default or enter #: _____	Enter extension or phone number: _____	Model: _____ Side car? Yes No

Buttons

Shared FXO (Analog) Lines

You can create a shared line to reserve an FXO (analog) line for one user or a group of users. The number of possible shared lines depends on the total number of enabled FXO ports on the UC320W and SPA8800 gateways. Copy this page if you need to enter additional shared lines. Note: This feature is not applicable when PBX Mode is selected in System Settings.

Shared Line Label and FXO (Analog) Line Enter a name for the shared line. Identify the FXO line by entering the short description or the phone #.	Voicemail and Email Options Enable or disable voicemail. Optionally, specify an email address for notifications.	Allow general use for outbound calls? (Select No to allow outbound calls by Members only.)	Members List the users who will share this line.
Label: _____ FXO Line to use: _____	Enable voicemail? Yes ✓ No Email address (optional): _____	Yes No ✓	
Label: _____ FXO Line to use: _____	Enable voicemail? Yes ✓ No Email address for notifications (optional): _____	Yes No ✓	

Shared Line Label and FXO (Analog) Line Enter a name for the shared line. Identify the FXO line by entering the short description or the phone #.	Voicemail and Email Options Enable or disable voicemail. Optionally, specify an email address for notifications.	Allow general use for outbound calls? (Select No to allow outbound calls by Members only.)	Members List the users who will share this line.
Label: _____ FXO Line to use: _____	Enable voicemail? Yes ✓ No Email address for notifications (optional): _____	Yes No ✓	
Label: _____ FXO Line to use: _____	Enable voicemail? Yes ✓ No Email address for notifications (optional): _____	Yes No ✓	

Shared Extensions and Additional Extensions

Create additional extension for a single user or a shared extension for a group of users. Copy this page if you need to record more information.

User or Group Name and Settings Enter a name and settings.	Extension Use the default extension number or enter a number. Optionally add buttons to support more calls.	Voicemail and Email Options Enable or disable voicemail. Optionally, specify an email address for notifications.	Members List a single user or a group of users who will share this extension.
Label: _____ Extension: Use Default or enter #: _____	Use Default or enter #: _____ # phone buttons: 1 ✓ 2 3 4	Enable voicemail? Yes ✓ No Email address (optional): _____	

User or Group Name and Settings Enter a name and settings.	Extension Use the default extension number or enter a number. Optionally add buttons to support more calls.	Voicemail and Email Options Enable or disable voicemail. Optionally, specify an email address for notifications.	Members List a single user or a group of users who will share this extension.
Label: Extension: Use Default or enter #: _____	Use Default or enter #: _____ # phone buttons: 1 ✓ 2 3 4	Enable voicemail? Yes ✓ No Email address (optional): 	
Label: Extension: Use Default or enter #: _____	Use Default or enter #: _____ # phone buttons: 1 ✓ 2 3 4	Enable voicemail? Yes ✓ No Email address (optional): 	

Call Routing

Call Paging

External paging: If you plan to connect an external speaker system, choose one:

Use Default Extension or **Use this #:** _____

Paging Groups: You can set up 5 paging groups for paging through phone speakers.

Paging Group Label/Options Enter a name for the group. Circle options to enable.	Extension Use an automatically assigned number or enter an extension number for each group.	Members List the users to include in each group.
Name: _____ Options: Regular paging (interrupts calls) Non-intrusive paging Include external speaker?	Use Default or enter #: _____	
Name: _____ Options: Regular paging (interrupts calls) Non-intrusive paging Include external speaker?	Use Default or enter #: _____	
Name: _____ Options: Regular paging (interrupts calls) Non-intrusive paging Include external speaker?	Use Default or enter #: _____	
Name: _____ Options: Regular paging (interrupts calls) Non-intrusive paging Include external speaker?	Use Default or enter #: _____	
Name: _____ Options: Regular paging (interrupts calls) Non-intrusive paging Include external speaker?	Use Default or enter #: _____	

Hunt Groups

A hunt group is used to route calls to a group of users simultaneously or sequentially. Copy this page if you need to enter additional hunt groups.

Hunt Group Label and Settings Enter a name for the hunt group.	Extension Use the default extension number or enter a number. Optionally add buttons to support more calls.	Voicemail and Email Options Enable or disable voicemail. Optionally, specify an email address for notifications.	Members List the users. (Show order if Sequential.)
- Label: _____ - Order: Simultaneous Random Sequential from start Sequential from last answered - Ring Duration: _____ seconds (# of sec. to ring each phone) - Number of Attempts: _____ (# of phones to ring)	Use Default or enter #: _____	Enable voicemail? Yes ✓ No Email address (optional): _____	
- Label: _____ - Order: Simultaneous Random Sequential from start Sequential from last answered - Ring Duration: _____ seconds (# of sec. to ring each phone) - Number of Attempts: _____ (# of phones to ring)	Use Default or enter #: _____	Enable voicemail? Yes ✓ No Email address (optional): _____	
- Label: _____ - Order: Simultaneous Random Sequential from start Sequential from last answered - Ring Duration: _____ seconds (# of sec. to ring each phone) - Number of Attempts: _____ (# of phones to ring)	Use Default or enter #: _____	Enable voicemail? Yes ✓ No Email address (optional): _____	

Auto Attendant Menu

Depending on the System Settings (see [PBX/Key System, page 8](#)), you can set up a single menu or two menus (Day and Night). Also set up the menu options. If needed, you can customize the prompts.

Single Menu or Day Menu

Initial Menu Prompt: Circle one. **Use default** ("If you know your party's extension, you may dial it now.")

Use a custom prompt (See [AA Prompts, page 24](#).)

Direct Extension Dial: Allow user to input an extension number? Circle one. **Yes ✓** **No**

Note: If you allow this option, your menu options can include only the numbers that are not reserved for Internal Dialing patterns (see [Internal Dialing, page 9](#).)

Seconds Until Timeout: _____ (Default: 20)

Note: Also see the instructions below for Menu Options.

Optional Night Menu

Initial Menu Prompt: Circle one. **Use default** ("If you know your party's extension, you may dial it now.")

Use a custom prompt (See [AA Prompts, page 24](#).)

Direct Extension Dial: Allow user to input an extension number? Circle one. **Yes ✓** **No**

Note: If you allow this option, your menu options can include only the numbers that are not reserved for other purposes (see [Internal Dialing, page 9](#).)

Seconds Until Timeout: _____ (Default: 20)

Note: Also see the instructions below for Menu Options.

Menu Options

Use the following page to set up the menu options. Copy the page as needed for additional menus (Day, Night, and sub-menus). Refer to the following descriptions of the possible actions for each menu option.

For your information: Actions for AA Menu Options

- **Transfer Call:** The AA transfers the call to the number that you configure. In your notes, include the target user or group.
- **End Call:** The AA ends the call.
- **Play Prompt, Then:** The AA plays a recording and then takes the action you specify. Useful if you want to allow access to recorded messages such as location and hours. In your notes, include a short description of the prompt, and specify the action (Return to Menu, Transfer Call, or End Call).
- **Submenu:** Creates another menu with the same settings and options described here. Useful if you want to transfer callers to a department, such as Appointments, with its own menu options such as Schedule Appointment with Dr. Jones and Schedule Appointment with Dr. Smith.

This Menu is for: _____ (Enter a description such as All Hours, Day, Night, or Submenu Name)

Menu Option Number The user presses this #...	Action ...to do the following action: (See Menu Options, page 22)	Additional information Enter required information for action, such as target user or group, prompt to play, or submenu options. (See Menu Options, page 22)
1		
2		
3		
4		
5		
6		
7		
8		
9		

AA Prompts

Enter up to 20 prompts. Four default prompts are provided in the default language for the specified region (see [Regional Settings, page 7](#)).

	Prompt
1.	Default: "If you know your party's extension, you may enter it now."
2.	Default: "Your call has been forwarded."
3.	Default: "Not a valid extension. Please try again."
4.	Default: "Good-bye."
5.	
6.	
7.	
8.	
9.	
10.	
11.	
12.	
13.	
14.	
15.	
16.	
17.	
18.	
19.	
20.	

Inbound Calls

Specify the inbound call routing for FXO (analog) lines and SIP/BRI (Voice over IP) phone numbers. Depending on your System Settings, you may need to specify day and night call routing destinations (see [PBX/Key System, page 8](#)).

Circle one. **Use the Default Route for all calls** ✓ **Create Custom Routes**

Name of Route If you add custom routes, enter a descriptive label for each one.	FXO Line or SIP/BRI Phone Numbers List FXO lines by description or FXO port number. List SIP/BRI trunks by provider name (all numbers from one provider route to the same destination). Optionally, create separate routes for SIP phone numbers to be routed to different destinations.	Route to: Specify a call destination (AA, user, group, voicemail pilot, or voicemail box). If applicable, enter call destinations for Day and Night (see PBX/Key System, page 8).
Default Route		Normal (Day): _____ Night (if applicable): _____
		Normal (Day): _____ Night (if applicable): _____
		Normal (Day): _____ Night (if applicable): _____
		Normal (Day): _____ Night (if applicable): _____
		Normal (Day): _____ Night (if applicable): _____

User/Group Features

Call Forwarding

For your information:

- **Default Call Forward Timeout:** 20 seconds
- **Default Call Forward Busy/No Answer Destination:** Voicemail (if enabled) or None (if voicemail is not enabled)
- **Default Destination for Night Routing (if enabled):** Same as Day

Custom Settings: Enter any custom settings, as needed. If you want to keep the default settings as shown above, no notes are needed below.

[illegible]

Dialing Privileges

By default, all users have Full Privileges (see [Dialing Restriction \(Classes\), page 11](#)). Below, note any users who need Basic or Expanded Privileges.

User Enter the name of each user that needs Expanded Privileges or Full Privileges.	Privilege Level Circle one.	Authorization Code Enable authorization codes to allow users to access their privileges from other phones in the office? Yes No ✓ If Yes, enter codes for users who need this feature.
All users have Full Privileges by default.	Full ✓	
	Basic Expanded	
	Basic Expanded	
	Basic Expanded	
	Basic Expanded	
	Basic Expanded	
	Basic Expanded	
	Basic Expanded	
	Basic Expanded	
	Basic Expanded	
	Basic Expanded	
	Basic Expanded	
	Basic Expanded	

Voicemail Settings

Do you want to send voicemail notifications via email? **Yes** **No ✓**

If Yes, enter the following information about your SMTP server.

SMTP Server IP Address: _____

SMTP Port: _____

Sender's Email Account

Email Username (example: *myName@example.com*): _____

Email Account Password: _____

For your information:

- **Default Record Limit:** The maximum storage capacity of a mailbox is **30** minutes.
- **Default Auto-Delete Interval:** The number of days that a message can be stored in a mailbox is **30** days.

Note: Additional limits cannot be changed: A mailbox is limited to 100 new messages, regardless of the total message length. The voicemail system can store up to 20 hours of messages in total.

Custom Settings: Enter any custom settings for user and group mailboxes, as needed. If you want to keep the default settings as shown above, no notes are needed below.

User/Group Enter the name of each user or group that needs custom settings. (Groups include hunt groups, shared extensions, and shared FXO lines.)	Record Limit (in minutes) Circle one.	Auto-Deletion Interval (in days) Circle one..
	30 60 90 120	10 20 30 40 50 60 Never
	30 60 90 120	10 20 30 40 50 60 Never
	30 60 90 120	10 20 30 40 50 60 Never
	30 60 90 120	10 20 30 40 50 60 Never
	30 60 90 120	10 20 30 40 50 60 Never
	30 60 90 120	10 20 30 40 50 60 Never
	30 60 90 120	10 20 30 40 50 60 Never

Phone and Side Car Buttons

Two worksheets are provided. Copy these pages if you need to enter additional phones and side cars.

For your information: Buttons per Device

- **SPA301:** 0 buttons
- **SPA501G:** 8 buttons
- **SPA504G:** 4 buttons
- **SPA509G:** 12 buttons
- **Side car:** 32 buttons
- **SPA303:** 3 buttons
- **SPA502G:** 0 buttons
- **SPA508G:** 8 buttons
- **SPA525G and SPA525G2:** 5 buttons
- **FXS:** 0 buttons

For your information: Determining the Available Buttons

Use the following information to calculate the available buttons on each phone.

Enter the total buttons on the device: _____

Subtract # buttons reserved for personal extension: - _____ (Default: 1)

NOTE Each line button allows 2 concurrent calls. You may add line buttons for the personal extension to allow more concurrent calls.

Subtract # buttons required for user's shared lines: - _____

Subtract # buttons required for user's shared extensions: - _____

Remaining buttons for special options: _____

For your information: Button options.

- **Unused:** Not configured. A phone user can configure a personal speed dial on this button.
- **Auto-Dial (speed dial):** Quickly dials the specified internal or external number. Include the target user's name in your notes.
- **Phone or Line Monitor (also called Busy Lamp Field):** Monitors the status (ringing, on a call, or on hold) of another phone or extension. Also can be used to pick up, speed-dial or transfer to the monitored extension. Helpful for assistants who need to monitor an executive's line. Include the target user's name in your notes.
- **Block Caller ID:** Allows the user to block caller ID for a call. The user presses the button and then dials the number; no caller ID will be available for this outbound call.
- **Call Park Slot:** Parks or unparks a call in the specified park slot number (1, 2, 3, or 4). Helpful for users who frequently park calls.
- **Force Night:** When the system is configured with a manual schedule, this button toggles between Day and Night mode and activates the corresponding settings for System Automation. When the system is configured with an automatic schedule, this button overrides the schedule and forces Night mode. Helpful if the user is responsible for opening and closing the office.
- **Intercom:** Initiates a two-way intercom call to the specified user through the phone speaker. Include the target user's name in your notes.
- **Pickup Individual:** Picks up a call that is ringing on the specified user's phone. Helpful for co-workers who frequently answer one another's calls during breaks and busy calling periods. Include the target user's name in your notes.
- **Site Pickup:** Displays a list of all ringing calls at the site. The user can choose a call to pick up.

User and Device Use a new row for each phone & side car.	# of Available Buttons	Options to Assign For some features, note additional information, such as the target user or group. See the notes above this table.
User: _____ Phone Model: _____ Or circle one: Side Car Descriptive label (optional): _____		
User: _____ Phone Model: _____ Or circle one: Side Car Descriptive label (optional): _____		
User: _____ Phone Model: _____ Or circle one: Side Car Descriptive label (optional): _____		
User: _____ Phone Model: _____ Or circle one: Side Car Descriptive label (optional): _____		

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User: _____ Phone Model: _____ Or circle one: Side Car Descriptive label (optional): _____		
User: _____ Phone Model: _____ Or circle one: Side Car Descriptive label (optional): _____		

External Directory

The system will automatically create directories for users and groups. If you need to add external numbers to the directory, enter the information below. Copy this page if you need to enter additional external contacts. The directory can support up to 100 external numbers.

[illegible]

Network

LAN

Data VLAN: Circle one.

Use System Default Settings

Use Custom Settings

Use Another DHCP Server for Data VLAN

If Custom, enter the following required settings:

IP Address: _____ (Default: 192.168.10.1)

Subnet Mask: 255.255.255.____ (Default: 255.255.255.0)

Default Gateway: _____ (Default: 192.168.10.1)

DHCP Address Range:

Starting IP Address: x.x.x.____ (Default: x.x.x.11)

Ending IP Address: x.x.x.____ (Default: x.x.x.254)

Voice VLAN: Circle one.

Use System Default Settings

Use Custom Settings

If Custom, enter the following required settings:

IP Address: _____ (Default: 10.1.1.1)

Subnet Mask: 255.255.255.____ (Default: 255.255.255.0)

Default Gateway: _____ (Default: 10.1.1.1)

DHCP Address Range:

Starting IP Address: x.x.x.____ (Default: x.x.x.11)

Ending IP Address: x.x.x.____ (Default: x.x.x.254)

NOTE The Voice VLAN ID is 100. If you are including an Ethernet switch in this installation, configure this Voice VLAN for all voice ports on the switch.

Wireless NetworkWireless channel: **Seek** ✓ 1 2 3 4 5 6 7 8 9 10 11

Wireless VLAN Enter the settings for the wireless Data and wireless Voice VLANs.	Network Name (SSID) If enabling this VLAN, enter information for each bulleted item below.	Security Strength Circle one.	Security Key or PassPhrase Enter a valid key. Requirements are noted.
Data: Enable Wireless? VLAN? Circle one: Yes No ✓	- SSID: _____ (1-31 characters) - Broadcast SSID? Yes ✓ No	Higher security (WPA2) ✓ Compatibility with older devices (WEP) None (not recommended)	Key: _____ WEP: Requires 10 or 26 hex digits (a-f, 0-9) WPA2-Personal: Requires 8 to 63 characters (Use a strong password with at least 8 characters.)
Voice: Enable Wireless VLAN? Circle one: Yes No ✓	- SSID: _____ (1-31 characters) - Broadcast SSID? Yes ✓ No	Higher security (WPA2) ✓ Compatibility with older devices (WEP) None (not recommended)	WEP: Requires 10 or 26 hex digits (a-f, 0-9). If both Data and Voice use WEP, key must be the same. WPA2-Personal: Requires 8 to 63 characters (Use a strong password with at least 8 characters.)

Port Forwarding

If you need to allow Internet access to hosted services (such as FTP server or web server) on this network, enter the information below. For details such as External Port #, Internal Port #, and Protocol, refer to the documentation for the Internet application that you are hosting. The system allows you to add up to 25 port forwarding entries. If needed, copy this page.

[illegible]

MAC Address and Serial Number Inventory (optional)

Use this table to record MAC addresses and serial numbers, for future reference, if needed.

[illegible]