



Setting up Your Phones

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Setting up Your Phones

You're ready to set up the phones for users on the Allworx system. To do this, you'll:

- Add Analog or SIP handsets
- Add the Users and assign extensions
- Add System Extensions
- Set up or Change Call Routing
- Define the Outside Lines



You'll need this much time

Setting up your phones on the Allworx system will take about an **hour**.



Gather This Information

You'll need the following information:

- The types of phone (analog or SIP) your company will be using.
- A list of users and the extensions you would like for each to have.
- A list of preferences of how users would like their calls routed according to their presence (location, activity, status of phone, etc.)
- A list of system extensions (such as phones in conference rooms, break rooms, etc.)



Before You Begin

Install the Allworx hardware.

- Mount the server where it will reside.
- Plug in the power cable.
- Plug in the phone line(s) from the service provider. These lines may be Central Office (CO) or Direct Inward Dialing (DID) lines.
- Plug in the handset for each user.
- Plug in the Ethernet cable for your PC into one of the LAN ports.

Prepare to send information to users about their Usernames and passwords, and extensions.

How to Add an Analog Handset

1. Expand **Phone System** and click **Handsets**.

Home > Phone System > Handsets

Phone System

Analog Handsets				Scan For New
Handset	Owner	Caller ID	Port	Action
			08	Modify Delete Ring
			09	Modify Delete Ring
			10	Modify Delete Ring
			11	Modify Delete Ring
			12	Modify Delete Ring
			13	Modify Delete Ring
			14	Modify Delete Ring
			15	Modify Delete Ring
			16	Modify Delete Ring

SIP Handsets					
Handset	Line	Owner	Caller ID	Identification	Action
					New SIP Handset

Handsets page

2. Make sure that the analog handset is plugged into an analog port (4 – 16) on the Allworx server. It's a good idea to plug the first phone into port 16, the next one into port 15, etc, working backwards toward port 4. Lift the receiver so that the phone is “off hook.” Click **Scan for New**.

Home > Phone System > Handsets > Scan For New Handsets

Phone System

To request the Allworx® to scan for new Analog Handsets and Outside (CO) FXO Lines, click on 'Scan Now'. The system will automatically add any new analog handsets and outside lines it detects. It may take as long as 30 seconds for the scan to complete. Before clicking on 'Scan Now' be sure that the new analog handsets are connected to the Allworx and that the handsets are **Off Hook**. You can view what the Allworx has added by following the "Phone System / Handsets" and "Phone System / Outside Lines" links.

Scan For New Handsets page

3. The handsets you plugged in will appear on the *Handsets* page.
4. Hang up the receiver.

How to Add a SIP Handset

1. Expand **Phone System** and click **Handsets**.

Home > Phone System > Handsets

Phone System				
Analog Handsets			Scan For New	
Handset	Owner	Caller ID	Port	Action
08			08	Modify Delete Ring
09			09	Modify Delete Ring
10			10	Modify Delete Ring
11			11	Modify Delete Ring
12			12	Modify Delete Ring
13			13	Modify Delete Ring
14			14	Modify Delete Ring
15			15	Modify Delete Ring
16			16	Modify Delete Ring

SIP Handsets					
Handset	Line	Owner	Caller ID	Identification	Action
					New SIP Handset
0003e30cd46d	1			MAC: 00-03-E3-0C-D4-6D	Modify Delete Ring

Handsets page

2. When a SIP phone is connected to the Allworx server, it will automatically be set up as a plug-and-play handset. These will appear on the list of handsets with “MAC” addresses in the Identification field.
3. Restart the phone by disconnecting its power supply, waiting 10 seconds, then reconnecting it.

How to Add a User and Assign an Extension

When finished, make sure you send the **Login Name**, **Password**, and **Primary Extension** information to each user.

1. Expand **Business** and click **Users**.

Business				
Users				
Name	Ext.	Current Presence	Login and Email Name	Action
Administrator, System	199	In Office	admin	Add New User Modify

Users page

2. Click **Add New User**.

Add New User page

3. Enter:
 - **Login Name:** the user will use this to log in to the client application
 - **Full Name:** First, Middle, and Last
 - **Password:** the initial default password which the user can later change. This password is used for logging in to the client application and for accessing voicemail.
4. Select a **Primary Extension**. This is the number that someone will dial to reach this user.
5. Select the **Phone Assignment** that matches the phone.

6. Check the System Features for the user:
 - **Enable Voicemail:** Creates a voice mailbox for the user. Select the maximum number of messages for the mailbox.
 - **POP3 Email Access:** Enables the user to access their email remotely.
 - **Allow other users to view calendar:** The user can change this, if desired.
 - **Enable Dial-by-Directory listing:** If enabled, the user is included in the directory for callers.
7. Select the maximum size of the **Universal Inbox** where email and voicemail messages will be saved as part of the Unified Messaging feature.
8. Click **Add**.
9. The user appears on the list. For example:

Home > Business > Users

Business				
Users				
Name	Ext.	Current Presence	Login and Email Name	Action
				Add New User
Administrator, System	199	In Office	admin	Modify
Smith, Lesley A	100	In Office	LSMith	Modify Delete

Users page with example

10. Click the person icon before each name to see the Welcome page for each user.

To: Lesley A Smith

Welcome to Allworx! - your complete phone, PC network and team productivity system.

To help you get off to a good start, listed below is the start up information you need to log onto the network, send and receive e-mails, personalize your voice mail, access your personal folders, view the company directory, and where to get additional information on how to use your phone.

Your Personal Account Information:

Logon Name: **LSMith**
 Email Address: **LSMith@allworx.inscitek.com**
 Phone Extension: **100**
 Directory Name: **Lesley A Smith**
 Share Folder: **\\allworx\users\LSMith**

Setting Up Voice Mail:

1. To access Voice Mail, dial x6100
2. Listen to prompts to personalize your mailbox with your name and greeting.

Your Personal Folders and System Information:

<http://corp.allworx.inscitek.com>

Note: It is recommended that you create a shortcut on your desktop for this link.

Sample User Welcome page

How to Add a System Extension

1. Expand **Phone System** and click **Extensions**.

Home > Phone System > Extensions

Phone System		
Extensions		
Ext.	Description	Action
		Add New Extension
0	Operator	View Call Routes
100	Lesley A Smith (LSMith)	View Call Routes
199	System Administrator (admin)	View Call Routes

Extensions page

2. Click **Add New Extension**.

Home > Phone System > Extensions > Add

Phone System	
Extension	
System Extension	200
Description	
Call Route	
On calls from: all callers	
add a connection attempt	
Finally... <ul style="list-style-type: none"> <input checked="" type="radio"/> Hang up <input type="radio"/> Transfer to Auto Attendant <input type="radio"/> Transfer to Voicemail for user Lesley A Smith <input type="radio"/> Dial number 	
<input type="button" value="Add"/>	<input type="button" value="Start Over"/> <input type="button" value="Cancel"/>

Add Extension page

3. Select the extension you want to use as a system extension.
4. Enter a **Description** of the system extension. For example, *First Floor Conference Room*.
5. To set up the call routing for the system extension, click **add a connection attempt**.
 - a. Select the phone for the extension.
 - b. Select the number of rings that will sound on the phone before another action will take place.
 - c. Select the type of ring for the extension. In the list, a dot means a short ring and a dash means a long ring.
 - d. To have the incoming call ring at more than one phone, click **add a phone**. Select a phone, number of rings, and type of ring for each phone.
6. To add more call routings, click **add a connection attempt**. Repeat step 4 for each addition call routing.

To remove a call routing, click **delete this attempt** for the connection.
7. Select the next action when all call routings have been exhausted:
 - **Hang up** without taking any further action
 - **Transfer to Auto Attendant**
 - **Transfer to Voicemail for user** and select the user who should receive the voicemail
 - **Dial number** to transfer the call to another extension or outside number
8. Click **Add**. The new system extension appears on the *Extensions* page.

How to Set up or Change Call Routing

When a call comes in for a user or system extension, it follows a path, or route, that has been set up for the extension. The routes are determined according to the user's status or the extension status, such as if the line is busy or unanswered. For example, if a call comes in for a user who is attending a meeting, the call could be routed to her voicemail or could be routed to another extension where someone else could handle the call. If a call comes in to a system extension in a conference room that is busy, it could be routed to the operator.

Call routes can be setup for individual users, telephones, or extensions and are based on events. Calls can also be routed according to the caller, if Caller ID is used. For example, calls from certain area codes may be routed to certain phones.

1. Expand **Phone System** and click **Extensions**.

Home > [Phone System](#) > [Extensions](#)

Phone System		
Extensions		
Ext.	Description	Action
		Add New Extension
0	Operator	View Call Routes
100	Lesley A Smith (LSMith)	View Call Routes
199	System Administrator (admin)	View Call Routes
200	First Floor Conference Room	View Call Routes Delete

Extensions page

- Click **View Call Routes** for the extension for which you want to establish a Call Route.

For user extensions, the call routes for each presence are shown.

[Home](#) > [Phone System](#) > [Extensions](#) > [Call Routes](#)

Phone System

Call Routes For Extension 100 - Lesley A Smith (LSMith)

Presence: In Office --- Active ---	New Call Route
On calls from all callers	
transfer to Voice Mail for Lesley A Smith (LSMith)	Modify
Presence: At A Meeting	New Call Route
On calls from all callers	
transfer to Voice Mail for Lesley A Smith (LSMith)	Modify
Presence: On Vacation	New Call Route
On calls from all callers	
transfer to Voice Mail for Lesley A Smith (LSMith)	Modify
Presence: On Business Trip	New Call Route
On calls from all callers	
transfer to Voice Mail for Lesley A Smith (LSMith)	Modify
Presence: At Home	New Call Route
On calls from all callers	
transfer to Voice Mail for Lesley A Smith (LSMith)	Modify
Presence: Away	New Call Route
On calls from all callers	
transfer to Voice Mail for Lesley A Smith (LSMith)	Modify
Presence: Busy	New Call Route
On calls from all callers	
transfer to Voice Mail for Lesley A Smith (LSMith)	Modify

Call Routes for User Extensions page

For system extensions, the call routes are shown.

[Home](#) > [Phone System](#) > [Extensions](#) > [Call Routes](#)

Phone System

Call Routes For Extension 200 - First Floor Conference Room

	New Call Route
On calls from all callers	
First connection attempt: 16 (Port:16) for 4 rings (Single (int), Double (ext))	Modify
Finally: transfer to Auto Attendant	

Call Routes for System Extensions page

3. Click **New Call Route** to create a new route or click **Modify** to change an existing Call Route.

New Call Route page

4. For a user extension, check **add this new route to all the user's presences** if you want to add this route for all presences.

For a system extension, you can change the description of the extension.

5. If you're creating a new route, select the call origination:
 - **External – Caller ID number** if you want calls from this number to be specially routed. You can enter an area code, area code plus prefix, or a complete number.
 - **Internal – phones owned by** if you want to change what happens when the call comes from a specific extension.

If you're modifying an existing route, select:

- **Modify Primary Route** if you want to change what happens when the call first comes in.
- **Modify On Busy Route** if you want to change what happens when the primary route is busy.

6. To set up the Call Route, click **add a connection attempt**.
 - a. Select the phone for the extension.
 - b. Select the number of rings that will sound on the phone before another action will take place.
 - c. Select the type of ring for the extension.
 - d. To have the incoming call ring at more than one phone, click **add a phone**. Select a phone, number of rings, and type of ring for each phone.
7. To add more call routings, click **add a connection attempt**. Repeat step 6 for each additional Call Route.

To remove a call routing, click **delete this attempt** for the connection.

8. Select the next action when all call routings have been exhausted:
 - **Hang up** without taking any further action
 - **Transfer to Auto Attendant**
 - **Transfer to Voicemail for user** and select the user who should receive the voicemail
 - **Dial number** to transfer the call to another extension or outside number
9. Click **Update**.

How to Define the Outside Lines

1. Expand **Phone System** and click **Outside Lines**.

Home > Phone System > Outside Lines

Phone System			
Analog Outside (CO) Lines		Scan For	
New			
Outside (CO) Line	Type	Port	Action
01	FXO	01	Modify Delete
02	FXO	02	Modify Delete
03	FXO	03	Modify Delete
04	FXO	04	Modify Delete
05	FXO	05	Modify Delete
06	FXO	06	Modify Delete
07	FXO	07	Modify Delete
Remote Allworx		?	
Remote Allworx	Action		
	New Remote Allworx		
Direct Inward Dial Blocks			
Block	Action		
	New DID Block		
Direct Inward Dial Routing Plans			
No Routing Plans have been defined. New Routing Plans can be created when a new DID Block is added, or an existing DID Block is modified.			
SIP Gateways			
Gateway	Action		
	New SIP Gateway		
SIP Proxies			
Proxy	Action		
	New SIP Proxy		

Outside Lines page

All sixteen ports are visible and available for configuration.

- Ports 1 through 3 can only be used for loop start business lines.
- Ports 4 through 9 can be used for either business lines or DID lines.
- Ports 10 through 16 may only be used for DID lines.

- Click **Modify** to set up an Outside Line.

Home > Phone System > Outside Lines > Modify Outside Line

Phone System

Outside Line

Port: 02

Description: 02 (typically enter phone number of line connected to Allworx)

Features

Enable Caller ID Detection

Prefix Digits: (digits dialed by Allworx after it seizes the line, before user dials)

Call Route

Calls received from this CO line go to:

Extension: choose an extension

Auto Attendant: Auto Attendant (x431)

Voicemail for user: Lesley A Smith

Update Start Over Cancel

Modify Outside Line page

- Enter a Description and select the port.
- Add prefix digits if:
 - The phone company in your area requires additional numbers to be dialed when accessing their services.
 - More than one PBX is used (i.e., the systems are cascaded together).

Enter the access digits as the **Prefix Digits**. Include the digits that the phone company or cascaded PBX requires but don't include the 9 that you normally need to access Allworx.
- Select where calls that come in on this line should be initially routed:
 - Extension** – all incoming calls are route to the selected extension
 - Auto Attendant** – calls are routed to the selected Auto Attendant
 - Voicemail for user** – calls are routed to the selected voice mail
- Click **Update**.
- Repeat steps 2 – 6 for each Outside Line.