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.

Contents

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			

DHCP Server Information

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

Circle one.　　**Using UC320W as the DHCP server**　　**Using another device as the DHCP server**

IMPORTANT: If another device acts as the DHCP server, special steps are needed to disable the DHCP server in the UC320W before adding it to the network. These steps are required to prevent address conflicts and to avoid network problems. (For documentation, see www.cisco.com/go/uc300.)

Network Setup

System Access

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.)

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

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

Cloud (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 **Users and Phone Assignments, page 15**.)

Quantities to order:

SPA Phone Models and Quantities:

SPA 8800 Gateways (note quantity): _____

LAN Settings

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 Network

Wireless VLAN	Network Name (SSID)	Security Strength	Security Key or PassPhrase
Enter the settings for the wireless Data and wireless Voice VLANs.	If enabling this VLAN, enter information for each bulleted item below.	Circle one.	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 if needed.

Application Name	External Port #	Internal Port #	Protocol TCP, UDP, or TCP+UDP	Target IP Address (of hosted server)

Telephony Settings

System Settings

System Mode:

> *For Your Information:* The following system modes are available:

> - **Key System:** Users can directly access analog phone lines through line buttons on the phone. All users can monitor all calls on all lines. If a call is placed on hold by one user, it can be resumed by any other user. When a user presses a line button, the line is immediately seized for an outbound call; no access code is required (no need to dial 9, for example). SIP/BRI trunks cannot be configured.
> - **PBX:** Users have no direct access to phone lines; external calls require an access code such as 9. There are no shared FXO (analog) lines (as described for Key System). Both FXO (analog) trunks and SIP/BRI trunks can be used.
> - **Blend:** The system functions as a PBX system, as described above, but allows shared FXO (analog) lines, as in a Key System. Outbound calls require a steering digit except when a shared FXO line (analog phone line) is selected by pressing a line button on a phone. FXO (analog) lines and SIP/BRI Trunks may be used.

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

Call Scheduling:

- **Auto Attendant:** Choose one.   **Turn On** ✔   **Turn Off**

  Choose one.   **Single AA menu for all hours** ✔   **Different menus when office is open/closed (day/night)**

- **Call Routing:**

  Choose one.   **Same behavior for all hours** ✔   **Allow different options for open/closed hours (day/night)**

- **Schedule:** If you chose the open/closed (day/night) option for any of the above features, indicate the schedule below.

  Choose one.   **Manually trigger open/closed (day/night) behavior through Force Night button on phone** ✔

  Use 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.

Regional Settings

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

Region: Circle one. **Australia**   **Canada**   **Hong Kong**   **New Zealand**   **United Kingdom**   **United States**

Dial Plan options for Canada and the United States: Circle one. **North American-10-Digit** ✔   **North American-7-Digit**

Time Zone: _____

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

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**

You can have a total of 4 SIP/BRI trunks. Enter the information in **SIP Provider Information, page 11** or the **Mediatrix Gateway Information, page 12**.

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)**: _____

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

Use 1+ Dialing: 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 ✔**

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)

Use 1+ Dialing: _____

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: _____

System Features

Internal Dialing

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

System Extensions:

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 #:** _____

Meaning of First Dialed Digit: Refer to the information below, and then enter the options for each digit in the table.

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). For all digits marked "Outside Line," note the trunk to use for outbound calls.
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:** _____

Digit	Purpose Circle the default setting, or enter a different option (see notes above this table). For all digits marked "Outside Line," note the trunk to use for outbound calls.
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:** _____
8	**Use Default (Not Allowed)** Enter trunk: _____ (Required) or **Use this option:** _____ If outside line, enter trunks for outbound calling: _____
9	**Use Default (Outside Line)** Enter trunk: _____ (Required) or **Use this option:** _____ If outside line, enter trunks for outbound calling: _____

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 #:** _____

Users 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**

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 ✔**	
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 ✔**	

Additional Extensions and Shared 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): _____	
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 Enter a name for the group.	Extension Use an automatically assigned number or enter an extension number for each group.	Members List the users to include in each group.
	Use Default or enter #: _____	
	Use Default or enter #: _____	
	Use Default or enter #: _____	
	Use Default or enter #: _____	
	Use Default or enter #: _____	
	Use Default or enter #: _____	
	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 **System Settings, page 9**), 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 22**.)

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 13**.)

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 22**.)

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 13**.)

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 20**)	Additional information Enter required information for action, such as target user or group, prompt to play, or submenu options. (See **Menu Options, page 20**)
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 10**).

	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.	

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)

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

User/Group	Call Forward Busy/No Answer Settings	
Enter the name of each user or group that needs custom settings. (Groups include hunt groups, shared extensions, and shared FXO lines.)	**Destination** Specify the destination (such as an extension, a voicemail box, the AA, or an external number).	**Timeout** Enter a custom timeout setting, in seconds.

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 **System Settings, page 9**).

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

Name of Route	FXO Line or SIP/BRI Phone Numbers	Route to:
If you add custom routes, enter a descriptive label for each one.	List FXO lines by description or FXO port number. List SIP/BRI phone numbers individually or by SIP provider name/description.	Specify a call destination (AA, user, group, voicemail pilot, or voicemail box). If applicable, enter call destinations for Day and Night (see **System Settings, page 9**).
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): _____
		Normal (Day): _____ Night (if applicable): _____

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.

Name	External Phone Number
Enter the name to list in the directory.	Enter the external phone number.

User Features

Voicemail to Email Settings

To enable the voicemail-to-email feature, you need to enter the following information about your SMTP server.

SMTP Server IP Address: _____

SMTP User Name (for SMTP authentication): _____

SMTP Password (for SMTP authentication): _____

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   **SPA303:** 3 buttons
- **SPA501G:** 8 buttons   **SPA502G:** 0 buttons
- **SPA504G:** 4 buttons   **SPA508G:** 8 buttons
- **SPA509G:** 12 buttons   **SPA525G and SPA525G2:** 5 buttons
- **Side car:** 32 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.
- **BLF:** Monitors the status (ringing, on a call, or on hold) of another user's extension. Also can be used to speed 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**		
User: _____ Phone Model: _____ Or circle if applicable: **Side Car**		
User: _____ Phone Model: _____ Or circle if applicable: **Side Car**		
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User: _____ Phone Model: _____ Or circle if applicable: **Side Car**		

MAC Address and Serial Number Inventory (optional)

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

Device	MAC Address	Serial Number