

Admin's End-User Phone Number Configuration

Process Optimization

Background

As an admin who manage thousands of users, sometimes she/ he might assign the wrong phone numbers (on the dimension of number location) to users, and she/he won't be able to figure out until users reported the wrong configuration. She/he want to make sure she/he did things right after configuration change and let end user know if there's any correction.

Desired Use Cases

Admin wants an automatic check mechanism to ensure that the wrong number configuration will be found out before user reported, after discovering the wrong number configuration, she/he wants to have the ability to correct the error at once, and inform the user what has been changed.

Design Requirements

- Admin can manage department info (including department address) by Phone System > Company Info > Department Info.
- Admin can select User's department when she/he is adding user.
- System should have a timer to check the user's phone number configuration.
- Admin can audit users' phone number configuration status in User List / User Detailed page.
- Admin can change users' phone number by the entrance in User List/User Detailed page.
- Admin can notify user through system after she/he correct the wrong configuration.

Issues in Epic

- [Department management function. \(P0\)](#)
- [Department selection in Add User function.\(P0\)](#)
- [Automatic check users' phone number configuration by back-end timer. \(P0\)](#)
- [Alert Icon for User's phone number on User List & User Detailed page. \(P0\)](#)
- [Change Phone Number entrance on User List &User Detailed page. \(P1\)](#)
- [Confirmation pop-up of send notification email after reassign is done.\(P1\)](#)

Department management function

Type: User Story

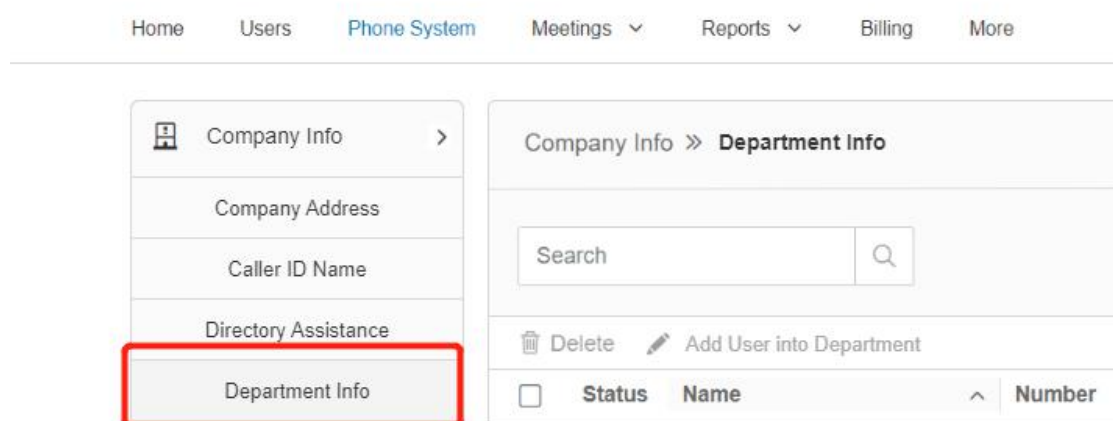
Priority: High

Description

Requirement

As an admin, I should be able to manage department info, so that I can manage users more methodically.

1. Add Department Info page in Admin Portal > Phone System > Company Info. Details are as follows:



2. Add functions in Department Info page as follows:

- Department Query
- Add New Department
- Delete Department
- Add Users into Department

Details are as follows:

3. Add Department Info List in Department Info page. List Columns should be as follows:

- Status
- Department Name
- Department Main Numbers
- Ext.
- Members
- Actions

Details are as follows:

Admin Portal

Home
Users
Phone System
Meetings
Reports
Billing
More

Company Info
Company Address
Caller ID Name
Directory Assistance
Department Info
Phone Numbers
Auto-Receptionist
Groups
Phones & Devices
Emergency Calling

Company Info » Department Info

Search

+ Add Department

Delete
 Add Users into Department

<input type="checkbox"/>	Status	Name	Number	Ext.	Members	Actions
		R & D	(678) 534-2373	2	10	
		XMN Sales	(205) 419-5362	1	13	

4. Add New Department pop-up details are as follows:

状态 1

New Department

Department Info

Department Settings

Numbers

General Info

Department Name

Department Extension

Address

Country

State/Province

City

Detailed Address(optional)

Back

Next

New Department

✓ Department Info

Department Settings

Numbers

Regional Settings

Time Zone

Time Format

Home Country Code

User Language

Greetings Language

Regional Format

Back

Next

New Department

✓ Department Info
✓ Department Settings
Numbers

Number Inventory
New Numbers

Number	Name	Location
<input type="radio"/>	(623) 267-5806	United States, Buckeye, AZ

Total: 1
Show: 25
< 1 >

5. When admin added a new Department, she/he needs to add a manager first when she/he click into add users into department function for this department for the first time. Add Users into Department pop-up details are as follows:

New Department

Select Managers
Select Members

☒ Select Managers From User List
 ☐ Use Manager's Email

Show All
Show Selected (1)

Name	Ext.	Permission
<input checked="" type="checkbox"/> Alex Li	12	Full Access
<input type="checkbox"/> AS 1A	7	
<input type="checkbox"/> brianlest1 test	104	
<input type="checkbox"/> Edgar Lee	113	
<input type="checkbox"/> Edgar Test	107	
<input type="checkbox"/> Edgar Test 2	108	
<input type="checkbox"/> Edgar Test 3	109	
<input type="checkbox"/> Edgar Test 3	110	
<input type="checkbox"/> Edgar Test 4	111	
<input type="checkbox"/> Eric Tan	65	

Total: 25
< 1 2 3 >

New Department

✓ Select Managers

Select Members

Search

Show All

Show Selected (0)

<input type="checkbox"/>	Name	Ext.	Department
<input type="checkbox"/>	Alex Li	12	
<input type="checkbox"/>	AS 1A	7	
<input type="checkbox"/>	briantest1 test	104	whatever
<input type="checkbox"/>	Edgar Lee	113	Product Management
<input type="checkbox"/>	Edgar Test	107	
<input type="checkbox"/>	Edgar Test 2	108	
<input type="checkbox"/>	Edgar Test 3	109	
<input type="checkbox"/>	Edgar Test 3	110	Digital Marketing
<input type="checkbox"/>	Edgar Test 4	111	Product
<input type="checkbox"/>	Eric Tan	65	

Total: 25

<

1

2

3

>

Back

Done

6. By clicking Department Info List > Name column, admin will be direct to Department Detailed Page. In the Department Detailed Page, admin should be able to manage:

- General Info & Address
- Regional Settings
- Number & Manager
- Members Management

Details are as follows:

Company Info

Company Address

Caller ID Name

Directory Assistance

Department Info

Phone Numbers

Auto-Receptionist

Groups

Phones & Devices

Emergency Calling

Company Info >> Department Info

Search

+ Add Department

Delete

Add User into Department

<input type="checkbox"/>	Status	Name
<input type="checkbox"/>		R & D
<input type="checkbox"/>		XMN Sales

R & D (Ext. 2)

General Info & Address

Regional Settings

Number & Manager

Members management

General Info

Department Name

Department Extension

Address

Country

State/Province

City

Detailed Address(optional)

Delete Department

Save

Delete

Add User into Department

StatusName

R & D

XMN Sales

R & D (Ext. 2)

General Info & AddressRegional SettingsNumber & ManagerMembers management

Primary Members

+ Add Member

Name	Ext.	Actions
ForDemo1 Only	101	Delete
AS 1A	7	Delete
Alex Li	12	Delete

Delete Department

Save

Service Web

Department Selection In Add User Function

Type: User Story

Priority: High

Description

Requirement

As an admin, I want to have ability to select user's department when adding user. If the attribution of the number I assigned to the user is inconsistent with the address of his department, I want system to notice me before Add User > Add Number process is finished.

1. Add Department selection in Admin Portal > Users > User List > Users with Extensions > User List > Add User Function. Details are as follow:

Add Users

✓ Choose User Type 2 Add User Info 3 Setup Options

MVP user licenses available: 0 ⓘ

Require unique email IDs

Email	First Name	Last Name	Ext.	Department	Phone	Number
Email	First Name	Last Name	14	R & D	RingCentral Phone ...	(850) 422-3758(N...)

1 + Add Additional licenses to purchase: 1 [How is this calculated?](#)

Order Summary

Recurring Charges - annual	Qty	Subtotal*
MVP User - MVP Licenses - Domestic DigitalLin...	1 x \$263.88	\$263.88
Today's Estimated Total*		\$263.88

*This price does not include calculations for prorated amounts, taxes, fees, and/or shipping.

Back Next

2. Add back-end check rule on number attribution and department address. If number attribution is inconsistent with the department address, when admin clicking 'Done' button to finish Select Number, A confirmation should pop-up to inform admin. Details are as follow:

Home Users Phone System Meetings Reports Billing More

Select Number

Number Inventory New Numbers

State/Province Area Code

California 650 - Atherton, Palo Alto Can't find the area code you're looking for?

Show 20 60 100 Change Set

<input checked="" type="radio"/> (650) 422-3758	<input type="radio"/> (650) 272-3210	<input type="radio"/> (650) 272-3229	<input type="radio"/> (650) 272-3359
<input type="radio"/> (650) 272-3415	<input type="radio"/> (650) 300-0907	<input type="radio"/> (650) 800-9082	<input type="radio"/> (650) 800-9101
<input type="radio"/> (650) 999-3462	<input type="radio"/> (650) 999-3492	<input type="radio"/> (650) 999-3557	<input type="radio"/> (650) 999-3570
<input type="radio"/> (650) 999-3618	<input type="radio"/> (650) 999-3699	<input type="radio"/> (650) 999-3748	<input type="radio"/> (650) 999-3781
<input type="radio"/> (650) 999-3802	<input type="radio"/> (650) 999-3837	<input type="radio"/> (650) 999-3859	<input type="radio"/> (650) 999-3972

Cancel Done

Phone Number Configuration Warning

The attribution of number you choose now is inconsistent with user's department address . Are you sure to assign this phone number to user?

No Yes

Scope

Service Web

Automatic check users' phone number configuration by back-end timer

Type: User Story

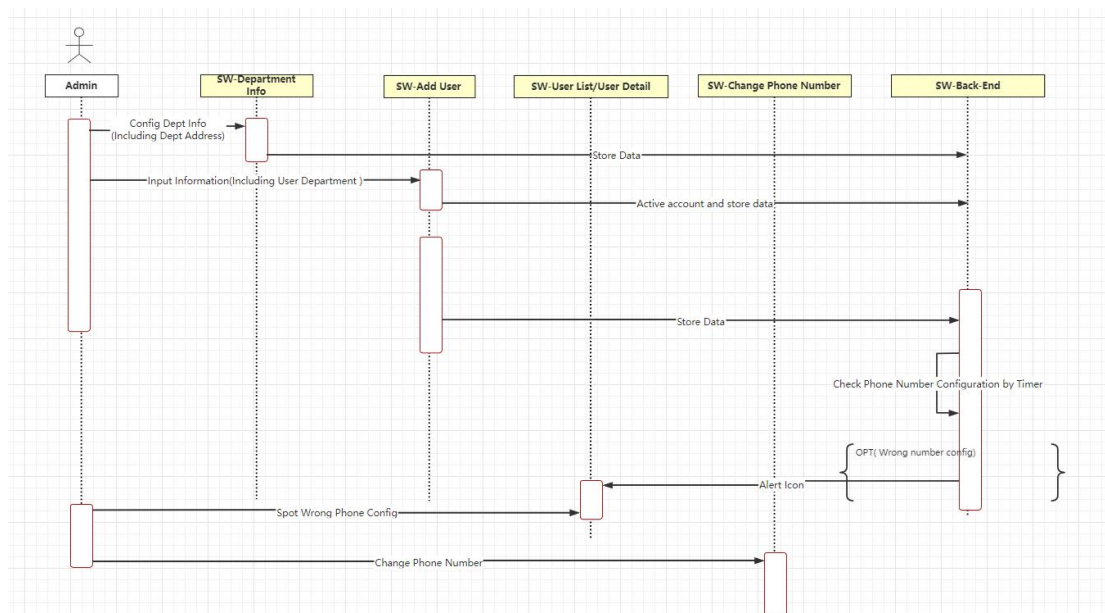
Priority: High

Description

Requirement

As an admin, I want system can automatically check if there is any wrong on users' phone number configuration.

1. Add a back-end timer automatically check if user's phone number attribution equals user's department address. Details are as follows:



2. Add a user phone configuration status field in Database.
3. Only DL numbers will be checked on this Version. Direct Number type requires further research and design since it doesn't have a reassign function existing.

Scope

Service Web

Alert Icon for User's Phone Number on User List & User Detailed Page

Type: User Story

Priority: High

Description

Requirement

As an admin, I want to have the ability to audit all users' phone number assignment without having to check it one by one.

1. Add Alert Icon in Admin Portal > Users > User List > Users with Extensions > User List > Number Column if status is warning, status data comes from the issue : [Automatic check users' phone number configuration by back-end timer]'s second requirement. A notification will be displayed when the mouse stops over the icon. Details are as follows:

Search										+ Add User	Download User List	
	Delete	✓ Enable	✗ Disable	Send Invite	Set Credentials	Apply Templates						
	Status	Name	Number	Ext.	Licenses	Roles	Department	Msg.	Actions			
		Jack Black	(650)642-9504	12	MVP	Standard		0 / 0				
		briantest1 test	(650)642-9504 (251)332-4514	104	MVP	Billing Admin	wtatever	5 / 5				
		ForDemo1 Only (Super Admin)	(650)666-0835	101	MVP	Super Admin		75 / 133				

	Delete	✓ Enable	✗ Disable	Send Invite	Set Credentials	Apply Templates						
	Status	Name	Number	Ext.	Licenses	Roles	Department	Msg.	Actions			
		Jack Black	(650)642-9504	12	MVP	Standard		0 / 0				
		briantest1 test	(650)642-9504 (251)332-4514	104	MVP	Billing Admin	wtatever	5 / 5				
		ForDemo1 Only (Super Admin)	(650)666-0835			Super Admin		75 / 133				

Wrong phone number assignment. Click number to edit

2. Add Alert Icon in Admin Portal > Users > User List > Users with Extensions > User List > User Detailed Page > Phones & Numbers > Phone List if status is warning, status data comes from the issue : [Automatic check users' phone number configuration by back-end timer]'s second requirement. A notification will be displayed when the mouse stops over the icon. Details are as follows:

Ext. 12

Outbound Calls/Faxes

Meetings

Notifications

▼ User Details

^ Phones & Numbers

Primary Number

(907) 290-8415

Edit

Phones

Numbers

Conference

+ Add Phone

⊕ Presence

⋮ ⓘ

Phone Nickname	Phone Type	Number	▼	Actions
RingCentral Phone app	RingCentral Ph...	(907) 290-8415	●	⋮

▼ Screening, Greeting & Hold Music

+ Add Phone

⊕ Presence

⋮ ⓘ

Phone Nickname	Phone Type	Number	▼	Actions
RingCentral Phone app	RingCentral Ph...	(907) 290-8415	●	⋮

Wrong phone number assignment.

Scope

Service Web

Change Phone Number entrance on User List & User Detailed page.

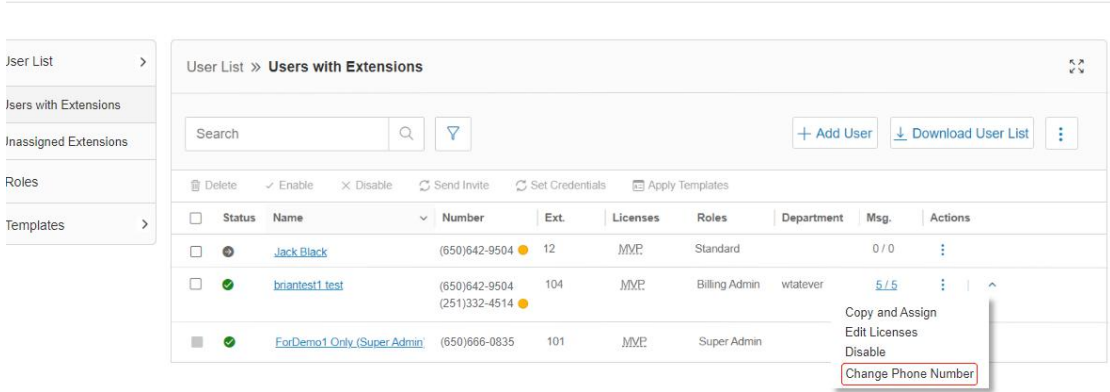
Type: User Story
Priority: Normal

Description

Requirement


As an admin, I want to have the ability to correct the wrong phone number configuration once I spot it.

1. Add 'Change Phone Number' button in Admin Portal > Users > User List > Users with Extensions > User List > Actions Column, by clicking this button, a pop-up will display and let admin choose the number she/he want to change. If is a DL number, page will display the same pop-up as Admin Portal > Phone System > Phones & Device > User Phones > Device Detailed Page > Edit Number Function, otherwise another pop-up will display and inform admin the she/he can not change direct number.



Change Phone Number

Which phone number do you want to change?

☒ (650)642-9504 

☐ (251)332-4514

Cancel

Next

Only (Super Admin)

(650)666-0835

101


MVP

Super Admin

75 / 1

Change Phone Number

Which phone number do you want to change?

☒ (650)642-9504 

☐ (251)332-4514

Wrong phone number assignment.

Cancel

Next

RingCentral



Home Users Phone System Meetings Reports Billing More

User List

Users with Extensions

Unassigned Extensions

Roles

Templates

Change Phone Number

1 Change Number

2 Keep Previous Number

3 Confirm Order

4 Order Confirmation

Number Inventory

New Numbers

Search

Locations

Number	Name	Location
<input type="radio"/> (823) 267-5806		United States, Buckeye, AZ

Total: 1

Show: 10

< 1 >

Cancel

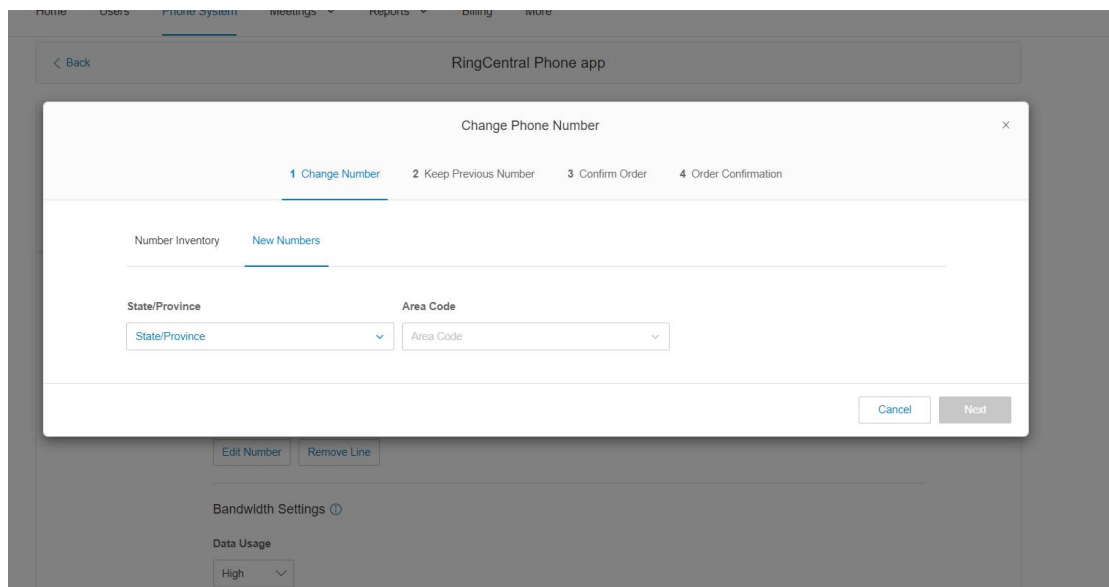
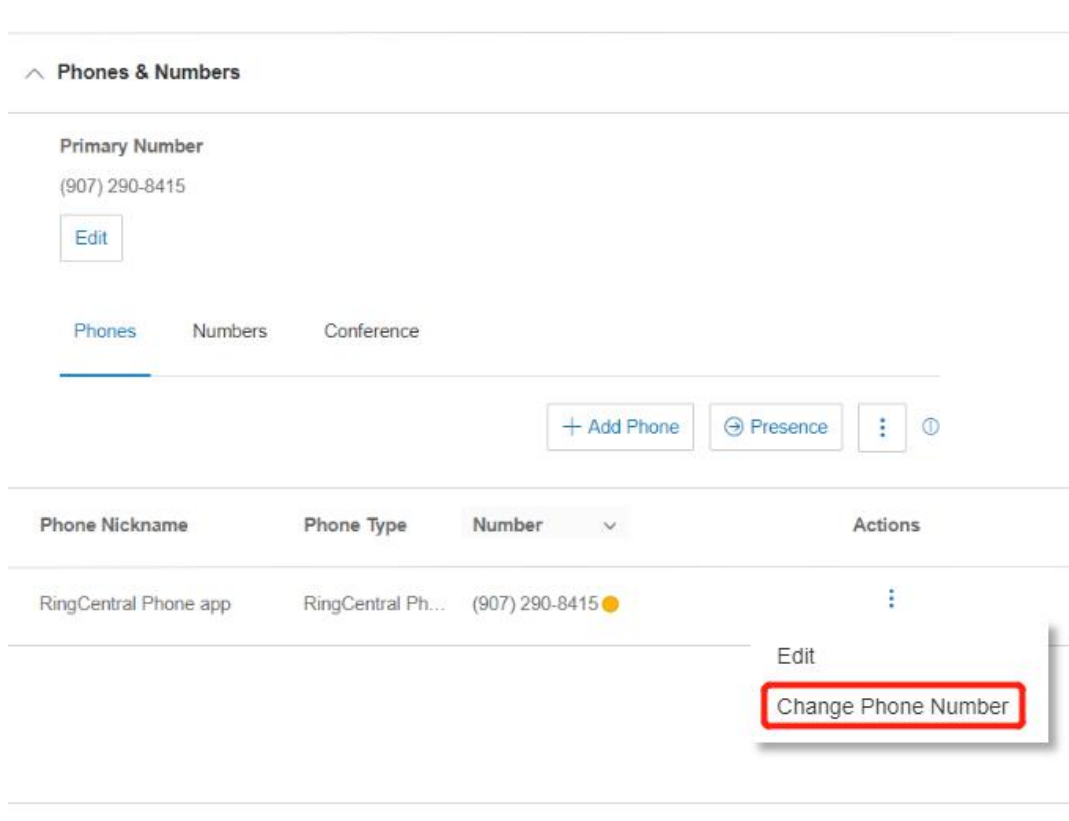
Next

Notification Sending Confirmation

Can't use Phone Number Change in Direct Number.

Close

2.Add 'Change Phone Number' button in Admin Portal > Users > User List > Users with Extensions > User List > User Detailed Page > Phones & Numbers > Phone List> Actions Column, by clicking this button, admin will be directed to Admin Portal >Phone System > Phones & Device > User Phones > Device Detailed Page > Edit Number Function. Details are as follows:



Scope

Service Web

Notification Sending Button on Number Reassign Page

Type: User Story

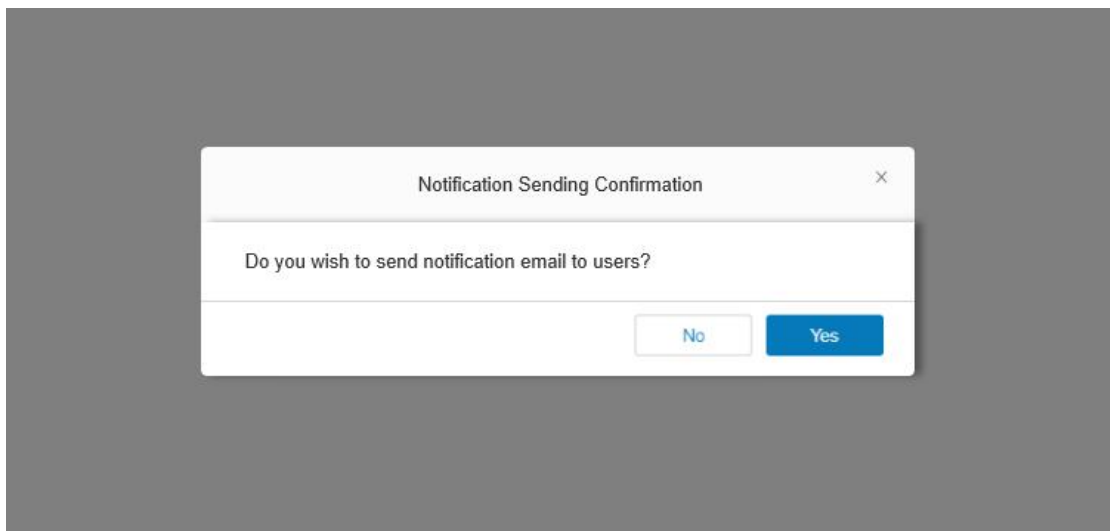
Priority: Normal

Description

Requirement

As an admin, I want to let users know what have been changed after I reassigned the phone number.

1. Add 'Send Notification' confirmation pop-up in Admin Portal >Phone System > Phones & Device > User Phones > Device Detailed Page > Edit Number Function. Details are as follows:



2. After finishing Edit Number, a 'Send Notification' confirmation will pop-up and inform the admin whether to send a notification email.
3. Notification email template's details are as follows:



Welcome

Dear Alex Li,

ForDemo1 Only has Changed your direct line in the RingCentral business phone system.

- Your company number is: (650) 666-0387
- Your extension number is: 12
- Your direct line is: (907) 290-8415
- Your email address for login is: 772734743@qq.com

Scope

Service Web