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)

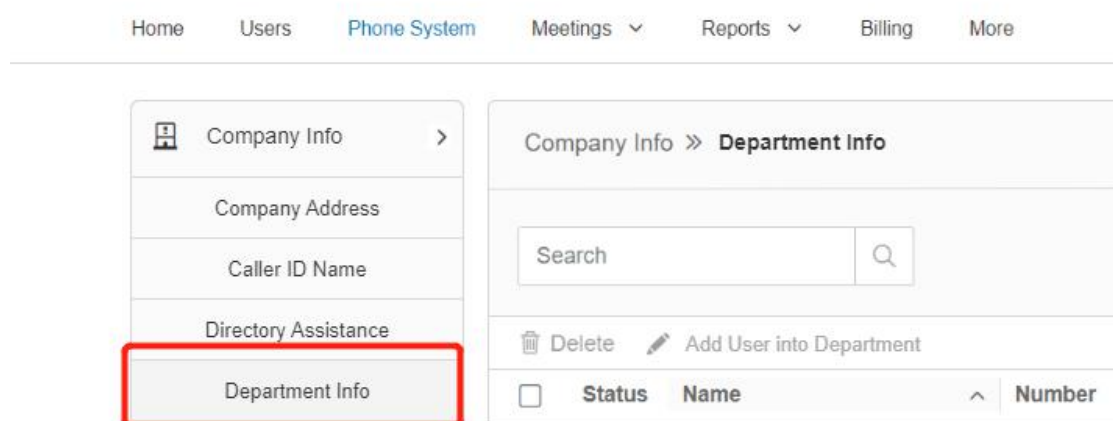# Department management function

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:

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

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:

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:

Scope

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:

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:

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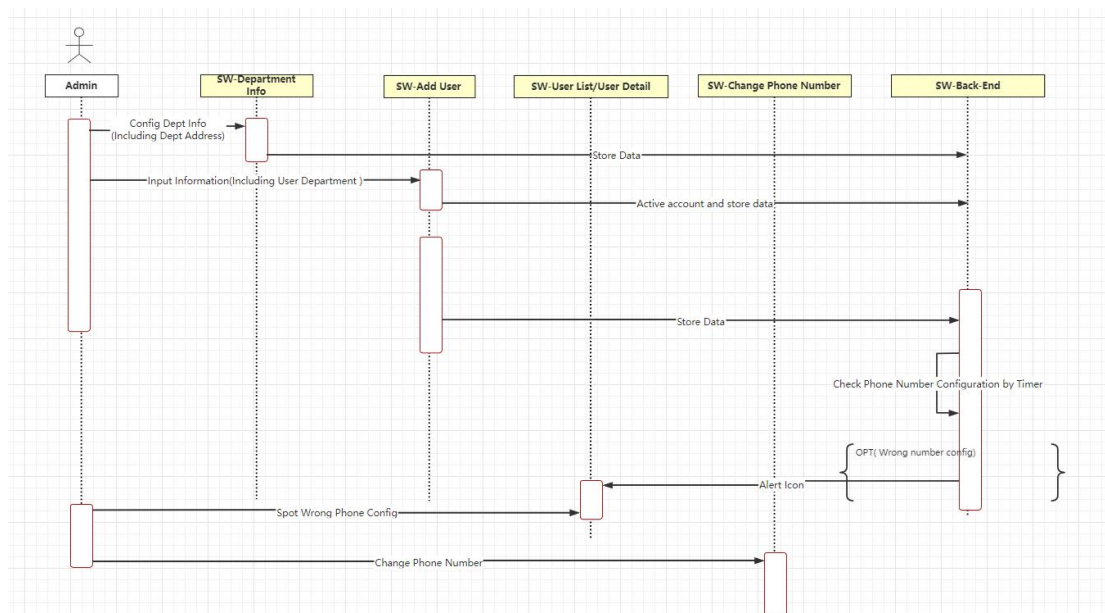
2. Add a user phone configuration status field in Database.
3. Only DL numbers will be checked on this Version. Direct Number type requires further research and design since it doesn't have a reassign function existing.

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:

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:

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.
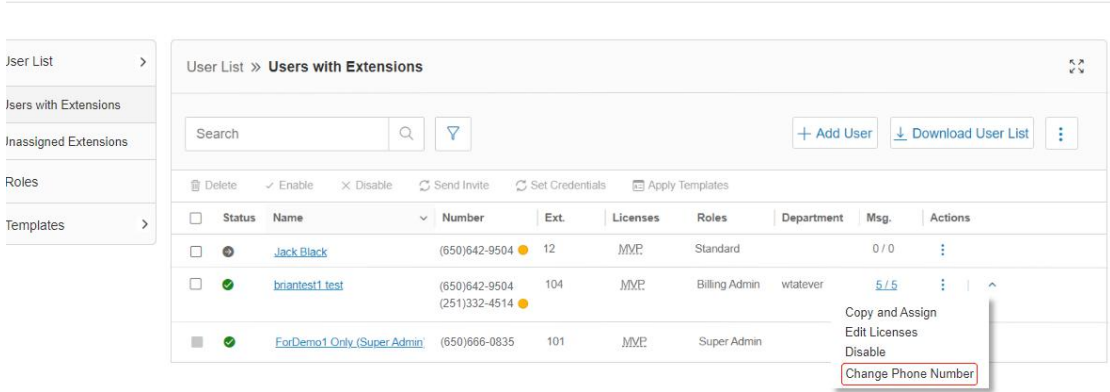
Change Phone Number

Which phone number do you want to change?

- ⦿ (650)642-9504 🟠
- ○ (251)332-4514

Cancel   **Next**

✕ Disable

Msg.
0 / 0

st   5 / 5

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

FO

	Change Phone Number	✕
User List	**1** Change Number **2** Keep Previous Number **3** Confirm Order **4** Order Confirmation	
Users with Extensions		
Unassigned Extensions	Number Inventory New Numbers	
🔊 Roles		
Templates	Search 🔍 Locations ⌄	

Number	⌄	Name	Location
○ (623) 267-5806			United States, Buckeye, AZ

Total: 1   Show: 10 ⌄   ‹ ① ›

Cancel   Next

Notification Sending Confirmation   X

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:
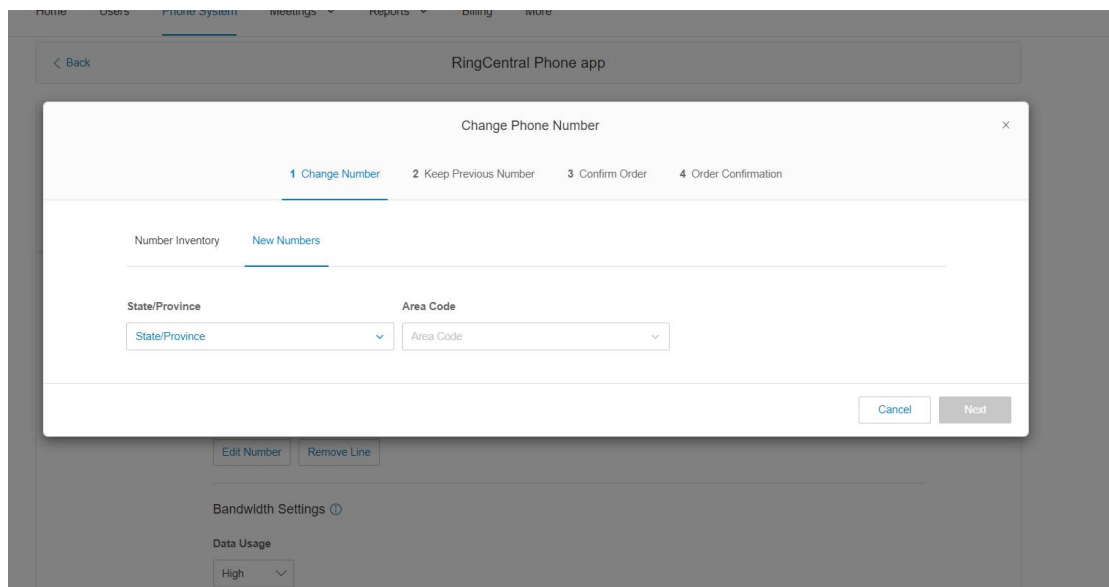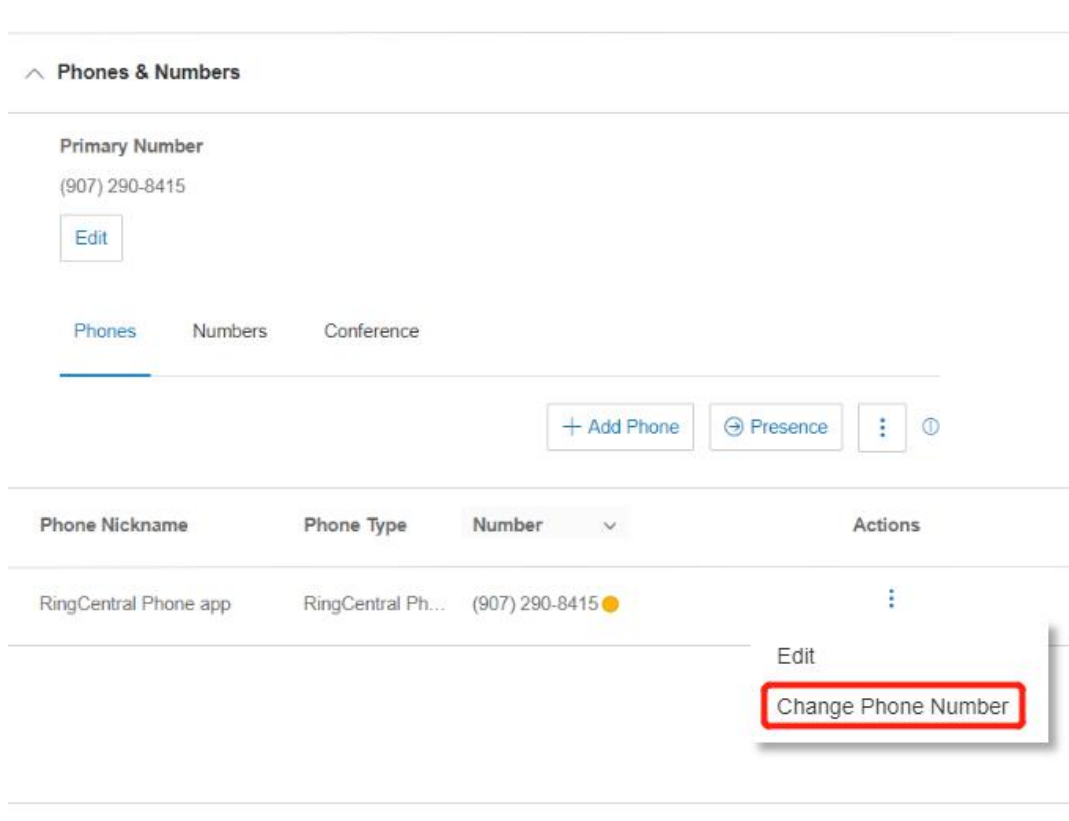
Scope

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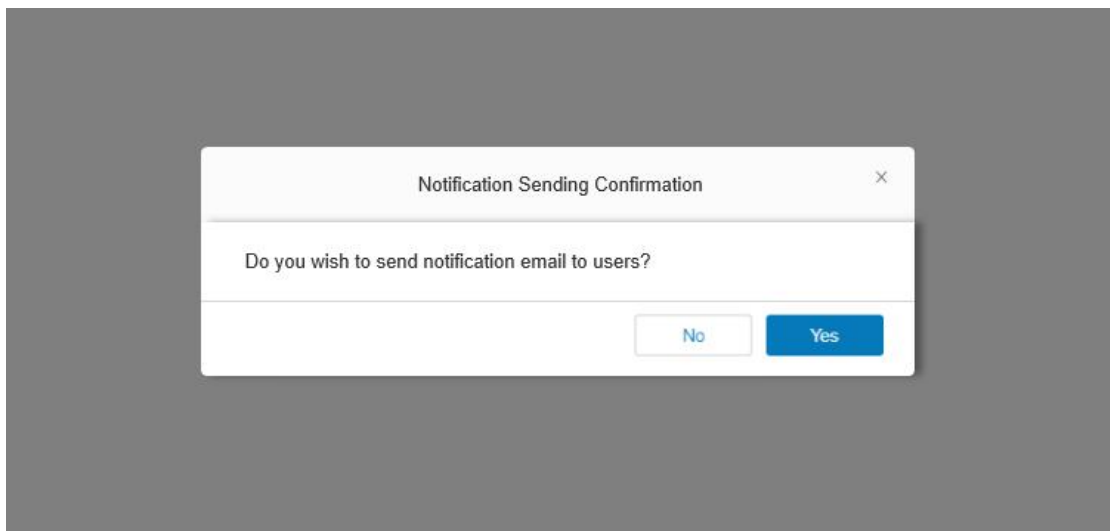
2. After finishing Edit Number, a 'Send Notification' confirmation will pop-up and inform the admin whether to send a notification email.
3. Notification email template's details are as follows:

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