Phonism

Getting Started with Phonism

A guide for the beginner to Phonism or to someone who would like to learn about a particular feature of Phonism

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Welcome to Phonism

You have signed up for the Phonism service and picked a plan - now what?
You will receive an automated email message from the system, as soon as your account is ready.
The email looks something like this:
_____

From: info@phonism.com
Date: April 23, 2018
To: you@yourdomain.com
Subject: Phonism

Thanks for signing up to manage your devices with Phonism! We're looking forward to working with you. Your account setup is nearly complete. We just need a little more information from you.
CLICK HERE to finish setting up your account
_____

Step 1 - Once you click on the link in your email, You will be immediately taken to our registration page where you will be asked to set up your password and enter your credit card information for billing purposes.

Step 2 - login in to Phonism
In the browser of your choice (Chrome seems to work best) go to:
app.phonism.com

Enter your email and the new password you just established in step 1

Phonism

Please sign in

Email address

you@yourdomain.com
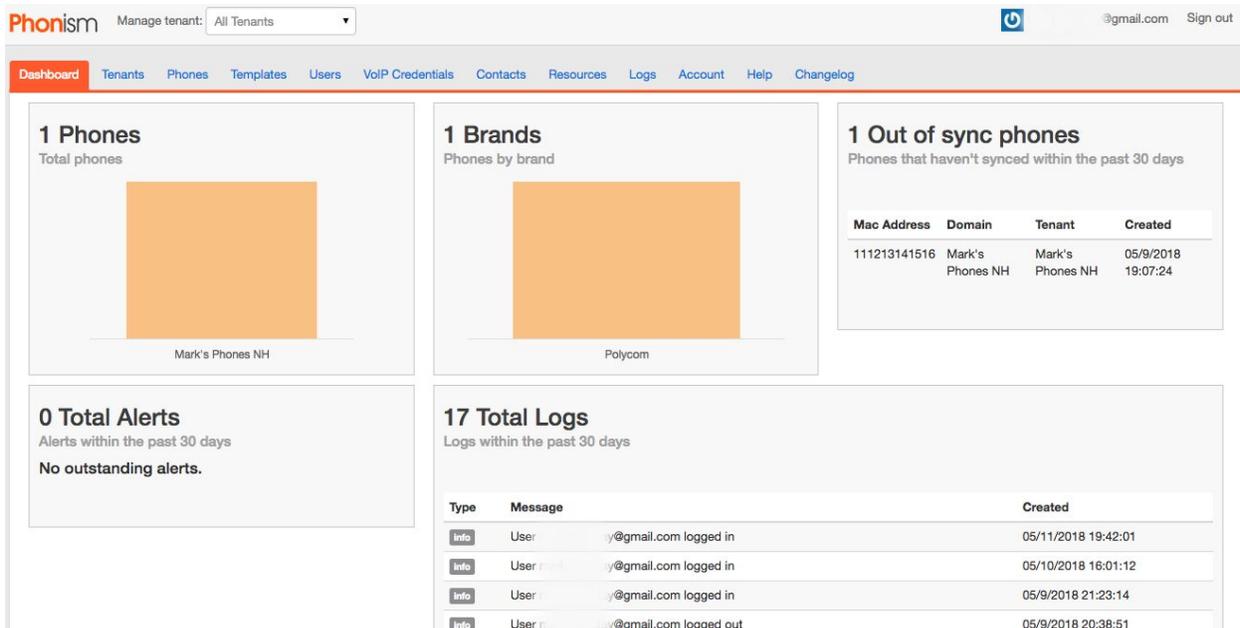
Password

••••••

☐ Remember me for 2 weeks

Sign in

Forgot password?

Understanding the Dashboard

The dashboard gives you a high-level overview of your account. Here you can see a breakdown of devices, alerts, & logs. It is also the launching place which you will start creating customers ("Tenants"), adding phones, managing configuration, and more!

What you see on the dashboard screen:

Phones (Top left chart) - Describes the number of phones you have configured in Phonism. In this case, you can see it is zero, since we are just getting your account going. Adding phones to any customer account will be automatically seen here in this chart

Brands (Top middle chart) - Describes the types of devices you are using, this will automatically populate based on the devices you add later.

Out of sync phones (Top right chart) - Describes the number of phones in your account that have not requested a configuration update from Phonism. This will usually be zero. If you see phones appearing here, you should do some investigation!

Alerts (**Bottom left chart**) - Alerts let you know if something did not work correctly in the past 30 days.

Ex: "Unable to import config.xml. No associated MAC address was found."

Total logs (Bottom right chart) - This gives you an overview of any change or action performed by an administrator/user of Phonism in the last 30 days.

All events are recorded here, so you know what was changed and by whom. If you would like a more detailed report, you can navigate to the logs tab at the top of the page.

Examples:
- User joe@phonism.com logged in 5/3/2018 05:07:01
- Assigned VoIP credentials 946527 to phone 164abcdddeac 5/3/2018 05:08:00
- User joe@phonism.com logged out 5/3/2018 5:10:00

Setting up a Tenant

Tenants are customer sites where you will be deploying and managing phones. When you log in to Phonism for the first time, there will be one tenant already set up in your account. Our current customers typically use this for their internal office or as a practice tenant.

To start adding tenants, **click the blue Tenants tab** in the upper left of the main dashboard screen (as shown below).

This will bring up the list of tenants you have in the system.

To **add a new tenant**:
1. Click on the "Add" button in upper left.
2. Add tenant data such as name, address, etc...
   - Additionally, you can add "Provisioning Credentials" for extra device security. This would require every device under this tenant to log in with these credentials before receiving configuration.
3. Click save in the upper right corner (Orange SAVE button)

Note: If you are managing a particular tenant, when you select this tab, you can edit the particular information for only that particular tenant.

You now have a tenant that you can start adding phones to! Yay!

In the example below I have created a tenant called Mark's Phones NH and I am now seeing this tenant's dashboard. You can verify this by looking in the navigation window in the upper left and it will show the name of the tenant you are managing.

To navigate to the Tenant you just created or to any tenant in your Phonism workspace, click on the drop down box at very top left that says Manage Tenant: This will allow you to quickly navigate or jump to any tenant by just selecting that tenant.

Adding phones to the customer location/tenant

Adding a Single Phone:

1. Click on the phones tab.
    - This will bring up the screen illustrated below. From this menu you will see all the phones at this tenant site.
2. Click on **Add One** in far left of screen.

Note: Make sure they are added to the correct tenant by double checking the tenant you are managing at the top.

3. After you have clicked "Add One" on the Phones page you will see the new dialog box (See below) for adding a single device. (In the next section we will talk about adding phones in bulk)
4. Enter the MAC address of the device - you can also enter all the other information, such as phone model, software versions and even configure the first line key on the phone.
5. In this dialog box, it is also possible to configure the SIP Server and URI for the call server the phone will be connected to. (This can be configured later if it is unknown at this time)

Once the Mac address has been entered into Phonism, the row in the Phonism phone screen for that phone, will either show the state as "Ready" or "Unknown" in the phones tab.

 Ready - This means Phonism has all the necessary information to serve the device it's configuration (MAC, Brand, Model, Software Version)

 Unknown Model - This means that we do not have the model information about the device to generate & serve it configuration. Once the device requests a config from Phonism, Phonism will auto-detect the model information and then attempt to detect the software version the phone is running.

 Unknown Software - This means that we do not have the software version about the device to generate & serve it configuration. Once the device requests a config from Phonism, Phonism will auto-detect the software version and then generate the proper configuration data for the phone and serve it to it.

At this point, the phone must be pointed to our configuration server (See the help tab in Phonism for a list server addresses for the different manufacturers). For best practices refer to "How to get a phone to talk to Phonism" below.

Once the device talks to Phonism we automatically detect its brand, model number, software version if you have not already entered it.

Essentially - all you need to do is enter the MAC address and then instruct the phone to use Phonism for provisioning and configuration.

Adding Phones in Bulk:

Phonism supports the bulk importing of devices via a CSV file. You can also add devices in bulk by importing configuration files.

1. Import CSV
    a. Users can upload a CSV file, exported from their spreadsheet application of choice, and import into Phonism.
    b. The ONLY required piece of data is the MAC addresses of the devices you want to import.
        > Required: mac_address

    c. However other data associated with each device can be pre-configured in the CSV. Examples:
        > Optional: voip_username, voip_password, sip_uri, extension_label, sip_server

        Format for CSV file:

        mac_address,voip_username,voip_password, sip_uri,extension_label, sip_server
        001122444444, John,password123,John@Doe.com,John,Doe.com
        001122555555, Jane,password456,Jane@Green.com, Jane,Green.com
        001122666666, Tom, password789,Snow@Tree.com,Tom,Tree.com

2. Import Config - this is a great advanced tool for migrating phones into Phonism.
    a. If you have existing configuration files, they can be imported into Phonism to import new devices.
    b. Imported configuration files will be parsed and imported into Phonism for that device.
    c. Refer to the Import Config dialog in Phonism for more information on how to use this tool.

Please note: Devices added to Phonism through either single add or bulk import are required to have Model and Software Version before attempting to edit the device configuration. This can be set manually or detected automatically (See above).

How to get a phone to talk to Phonism

A SIP phone must be instructed as to where to get its configuration/provisioning information from. Each device has a setting in the config that the phone looks to for its provisioning details.

<u>There are 3 ways to point a device to Phonism:</u>

1) Manually change the address:
    a) Access the web interface on the device itself, typically done by entering the IP Address of the device into a web browser on the same subnet. The userID/password of the device is set by the manufacturer but is often admin/admin.

    b) Locate the setting called "provisioning server". Enter the appropriate server address for the device you are provisioning (See Help tab in Phonism).

    c) Next click save, exit the screen and reboot the phone.
        i) When the phone powers up it will now look to the proper place in Phonism for its configuration.
        ii) The first time it looks to Phonism for configuration information, we detect the mac address, match it to what you entered earlier and capture in the the missing elements like phone brand, model, and software version.

    d) You are now ready to configure the phone (see next chapter).

2) Using Redirection Services:
    a) Many device manufacturers devices typically boot with a factory default setting to look to the manufacturers "Redirection Server" (RS) for provisioning instructions. This is a server hosted by the manufacturer. You will need to get an account from the manufacturer if you do not have one.
        i) When you purchase a new device, log into your RS account.
        ii) Add the MAC address of the new device.
        iii) Set config server location for that particular mac address. Enter the appropriate server address for the device you are provisioning (See Help tab in Phonism).
        iv) When the phone is rebooted it will now look to the Manufacturers RS and it will be instructed to go to Phonism for configuration.

    b) Thankfully, Phonism has made this even easier with **RS Integrations.** You never have to leave Phonism to use your RS account!
        i) In Phonism, navigate to the Account tab.

ii)   Enter your particular RS credentials.
iii) Phonism uses an API provided by the Manufacturer to instruct it to redirect the MAC addresses.

Ths saves you a a great deal of time. Just enter the MAC address into Phonism as instructed in the add phone section, and magically all the rest is handled for you!

3) Using DHCP option 66:

a)   If you control the DHCP server for the customer, you can set the option 66 setting to have the phone look to Phonism for configuration. This is an advanced networking capability, but if you are familiar with DHCP , then this can work well. There are many articles on the Internet that describe how to make these changes on different types of DHCP servers.

Configuring Devices

Once a device's Model and Software Version are known, the device will be in `READY` state and can be configured.

Using Templates:

Templates in Phonism are a powerful way to issue bulk changes across many devices. Templates can be used to apply settings to devices that may be common across all devices. This is great for applying line settings, SIP server, time server settings, dial plans, etc...

A few things to note:
● You can create as many templates as you wish.
● Templates are manufacturer specific.
   ○ Ex: You must create different templates for Yealink and Polycom devices.

Creating a Template:

1. Click on the Templates tab in the top navigation
2. Click on **Add** in the top left
3. Name your template and select a Software version to base the template from.
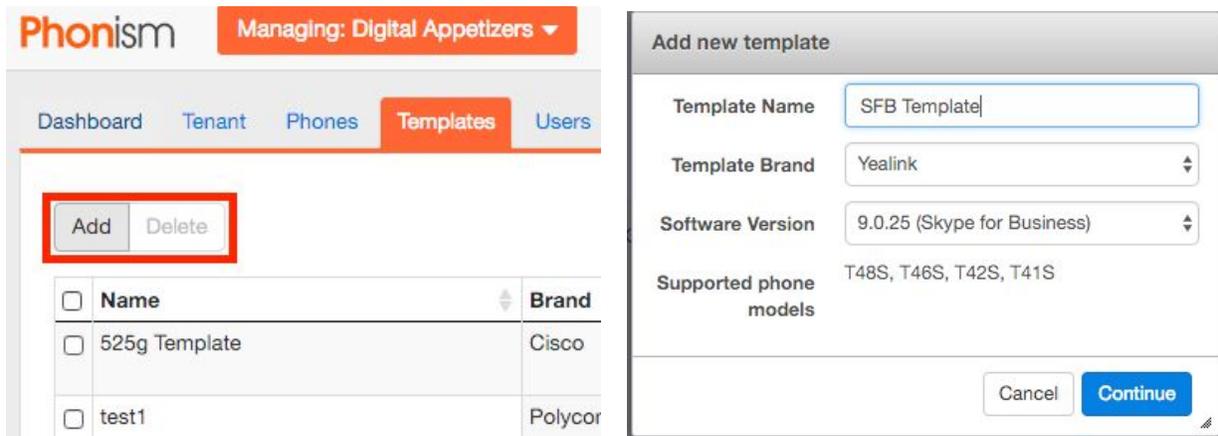
Editing Templates:

Next you will see a screen where you can edit the various parameters of the device type you selected. Remember, the options you see for a Polycom template will differ from Yealink because these phones offer different features and use different terminology.

The settings you configure in your template are up to you, but let's try to get you started:

1. On the left hand column, navigate to Line 1 (could be Extension 1 or Account 1 depending on the brand).
2. Here you can set important information such as your SIP server, server port, etc..
    a. Refer to brand specific documentation to identify parameter names (Some brands refer to SIP server as Primary server, Proxy, and other names)
3. Next you can set other parameters by navigating the left hand column.
4. When you are done, hit save.
5. Next, see the section on applying your template.

Some things to keep in mind:

- You cannot configure line-specific parameters like VoIP Credentials. Those are device-specific and not intended to be applied to multiple devices.
- Only "**Enabled**" parameters will be applied to devices. You can enable a parameter by checking the box next to the field.
  - This allows you to customize the settings that get changed when applying a template to your phones so that you can change a single parameter across all your phones in seconds!

Applying a Template:

Once you have configured your template it must be applied to a device. Select the desired device(s) and select "Apply Template" to reveal a dialog that will allow you to apply a template to the selected devices.

- Templates are brand-specific and applied regardless of model or software version of the device it is being applied to.
- Application of a template will override any existing configuration for the parameters that were configured directly in the device configuration. Be sure to click enable next to the fields in the template that you want to insure are set!

Configuring a single phone:

Selecting the "Edit" button for that device will open the configuration page.

If you have already set up a template, this page will look very familiar. Here is where you will configure your device, setup lines, buttons, and much more. Once you are done, saving your configuration will generate configuration files for this device.

Pro Tip: You can clone phones! Once you have a configuration that works, just use the clone button - which is left of the edit button on the phones tab. Enter the mac address of the new phone to apply the cloned configuration.
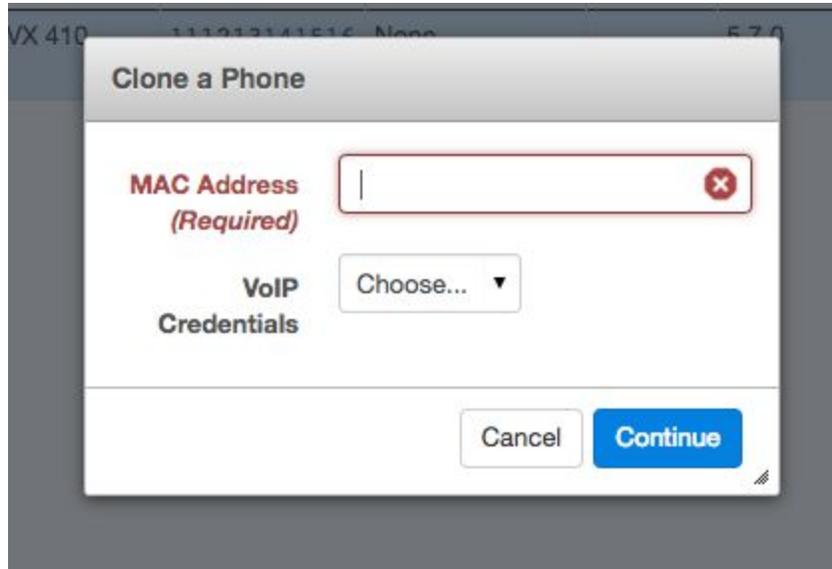
The above dialog box shows the clone a phone screen, just enter the mac address of the new device. You can also optional apply the credentials at this time as well.

VoIP Credentials (Extensions)

Phonism is also used to manage your VoIP Credentials. VoIP Credentials are username and password information used to register the device with the call server or voice server.
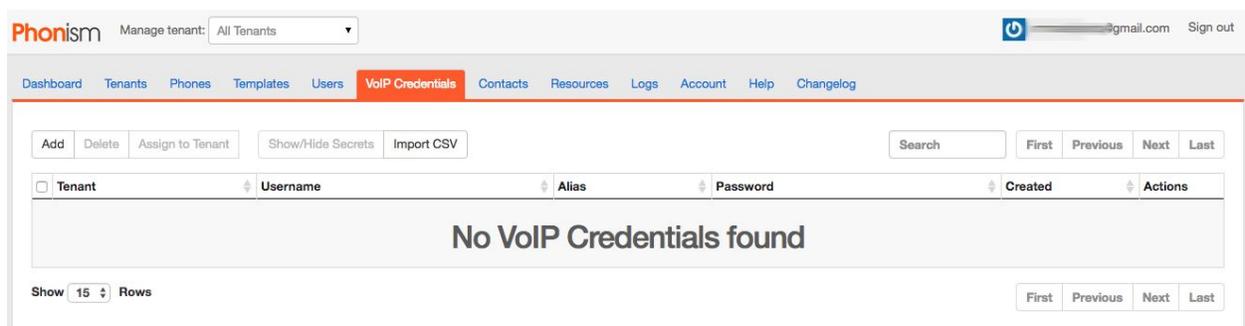
VoIP Credentials can be added one-by-one or imported in bulk via a CSV.

- VoIP Credentials are tenant-specific and not available to devices outside of the Tenant that the device belongs to. So credentials will need to be entered for each specific tenant. This is for security purposes. Once VoIP Credentials are added they are accessible when configuring phone lines via dropdown "VoIP Credentials
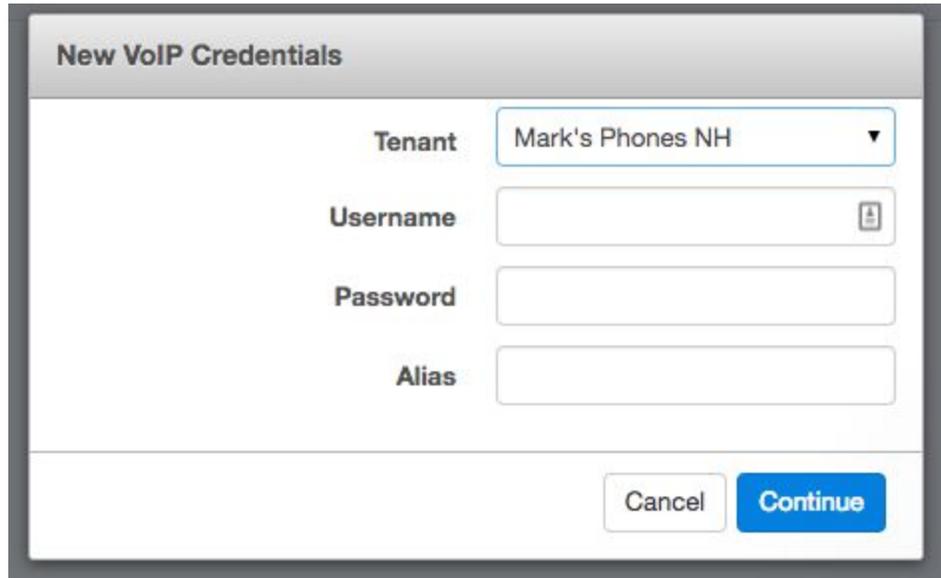
Screenshot of adding "VoIP Credentials" for a tenant

Adding a User to a Tenant

- Adding a user allows you to enable an administrator of a certain tenant. This new user will ONLY have access to the settings and devices at the tenant you enabled them for.
- Just select the blue Users tab to access the dialog box to add a user, then select add button to add a user.
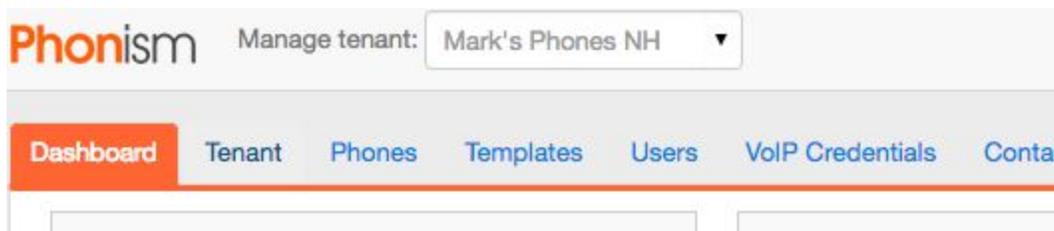
Add user dialog box is below. You can select the permission level and enter the data in the appropriate boxes.

IMPORTANT: An email is NOT Automatically sent to this user by the system to invite the new user/administrator. You will need to do so, and give them their password. This will be updated in future releases.

Example email:
Welcome to Phonism. You have been given an account on Phonism to manage and provision SIP phones for your company. Here are your credentials for loggin into PHonism for the first time.

User ID: theiremail@theirdomain.com
Password : PASSWORD *(Be sure to copy this from the USER screen when you generate their user account)*

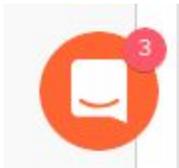Note: It is not possible to use the same email address for more than one user in the system
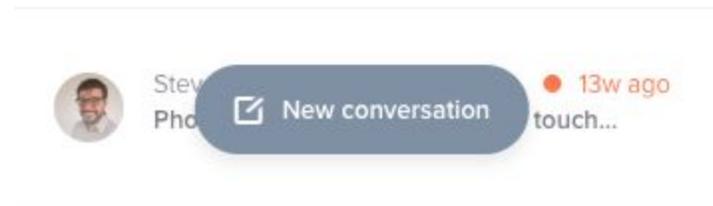
Getting Help

Chat:

You can chat with support at anytime through the chat window - just click on the icon in the lower right of your Phonism application

Then enter a new conversation to get started!

Email:

You can email support@phonism.com at any time.

Phone support is provided as part of the Professional solution and available to the account owners.