

Uboss Portal: the Basics

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Introduction

This document is designed to provide the basics of navigating the key areas of the Lumen VCT Uboss Portal allowing customers to become familiar. It is not intended to provide a step-by-step guide, this will be provided in more detailed specific guides and videos.

Uboss Portal Overview

The Uboss Portal provides customers with the ability to self-serve the Next Generation SIP service and Lumen® Voice Complete® Telephony with Webex service.

The Uboss Portal is a highly featured application providing:

- A configurable personalised homepage to show graphical views of Users, Charges, Call volume by numbers and duration,
- View and download rate cards
- Ability to set daily user Credit limits
- View and download inventory including:
 - Phone Numbers
 - Devices
 - Packages
 - Services
- Configure, view and download reports including:
 - Full daily CDR export
 - Call Volume
 - Charge code utilisation
 - User itemisation
 - Top 10
 - User itemised call summary
- Schedule Reports
- Configure group services such as Hunt Groups, Call Pickups etc
- Set Business hours and Holiday schedules
- Add, Amend and Cease Users, Devices, Services, Packages and Phone Numbers
- Individual and Bulk load capability
- Configuration of Call Centre profiles
- Direct configuration of VCT with Webex users
- Provide portal access to users at various levels including:

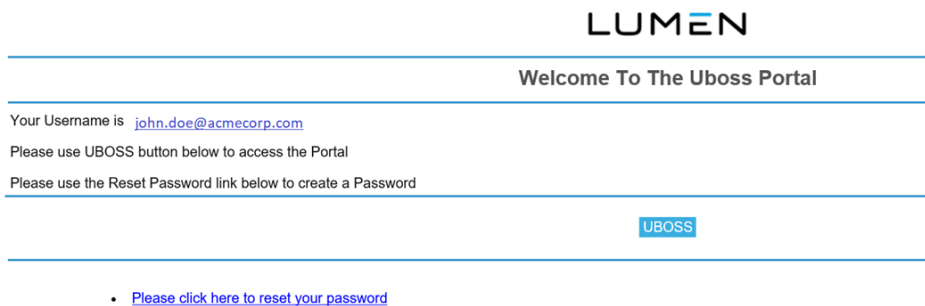
- Administrator
- Administrator Read Only access
- Individual User access
- Direct ordering of hardware
- Dynamic unit-based charging integrated into Lumen billing systems

Customer Administration Access

Access to the Uboss Portal by a Customer Administrator provides the user with access to create and amend sites, create and amend users across their organisation, access and schedule reports and view the devices connected.

Accessing the Uboss Portal

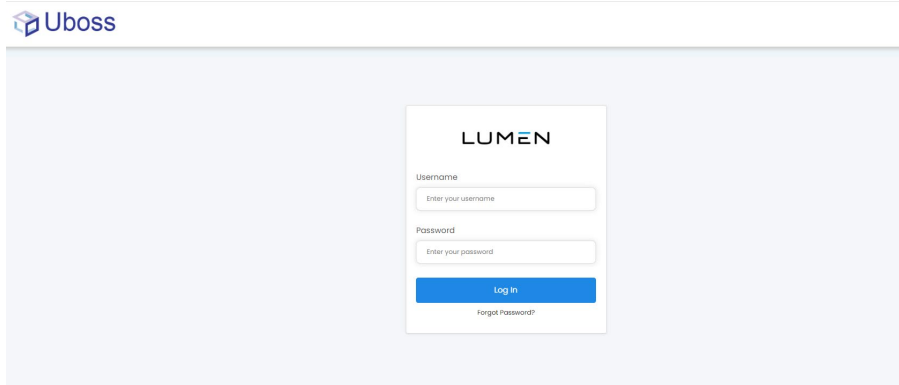
When a user is setup on the Uboss Portal, they will receive an email similar to the following:



When accessing the portal for the first time the password will need to be reset. Follow the “Forgotten Password” instruction below

Login Screen

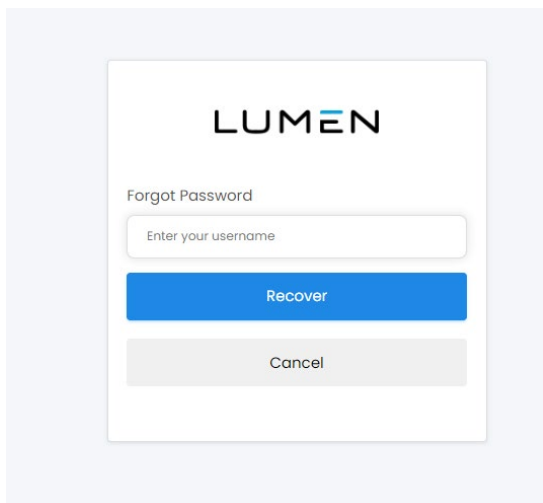
To login to the Uboss Portal, browse to the following url: <https://lumen.uboss.com/> where you will be prompted with the following screen:



- Enter your email address and VCT Portal password
- Click **Log in**

Forgotten Password

If you forget your password, click on the **“Forgot password?”** link, to be forwarded to the following page



- Enter your e-mail address and click the **“Recover”** button

If you have a login associated to the email entered, you will receive an email with a link to reset your password similar to the one shown below:

LUMEN

Uboss Password Reset

Hi,

We received a request to reset the password for your account.

To reset your password please click on the link below:

[Reset Password](#)

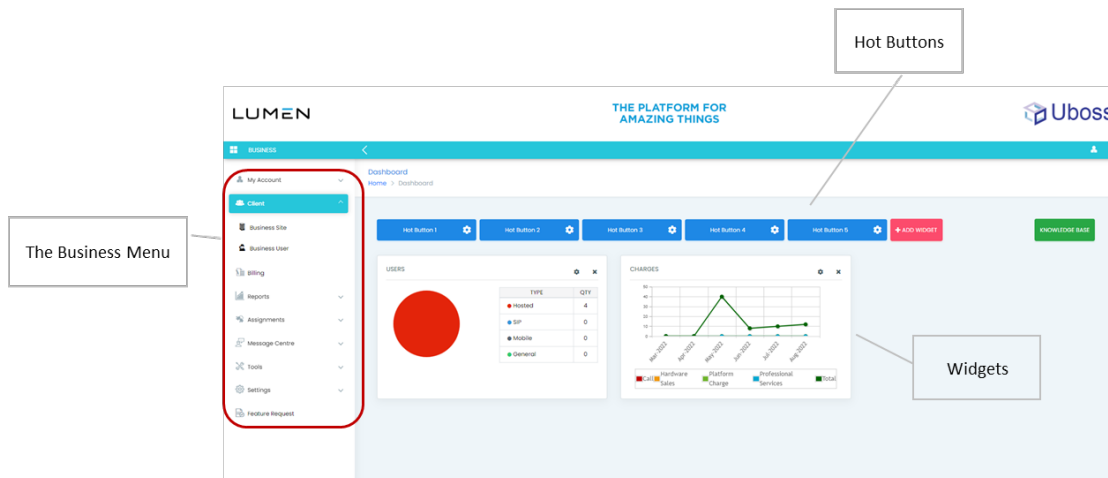
If you did not forget your password you can safely ignore this email and your password will remain the same.

The chosen password must be unique and not previously used.

Navigating the Portal

The Uboss Portal provides a multi-tier environment to manage aspects of the customer solution.

Home page or “Business level”



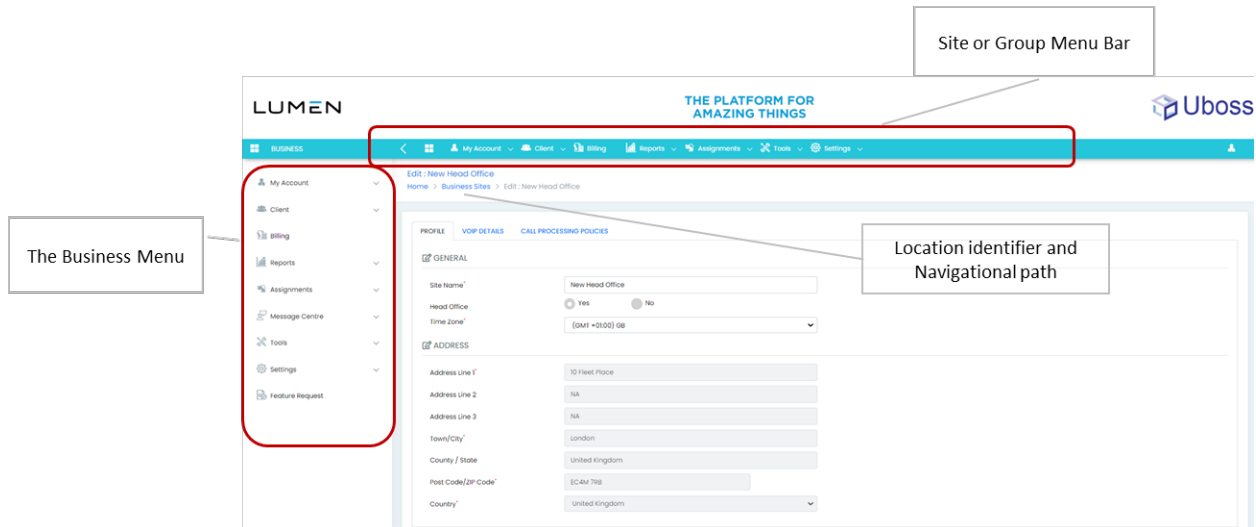
The Business Menu – provides navigation to configured sites within the business and access to business level configuration and tools

Hot Buttons – are configurable buttons that allow for short cuts to be configured either to areas of the portal or to external websites

Widgets – provide preconfigured graphical insight into the performance of the deployed solution including call volumes, charges and current user count. Widgets can be tailored by the “**Add Widget**” button

Site or Group Level Display

When navigating to a lower level the Site or Group level screen is displayed providing access to that site assets only. This is accessed by selecting the 'Client' menu and then **Business Site** from the left hand Business menu.

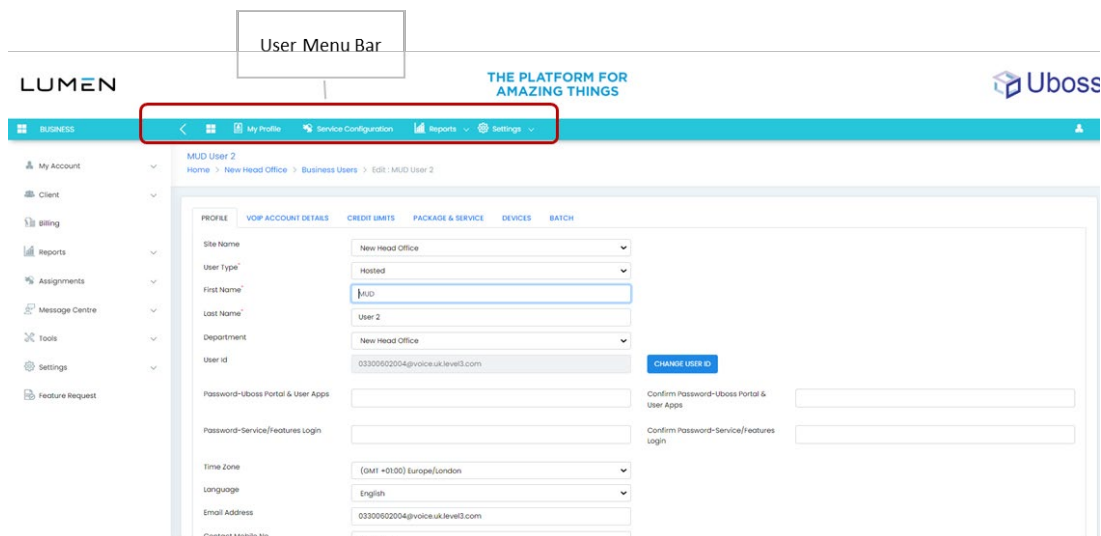


Site or Group Menu – Similar to the Business level, this provides navigation to configured users within the site and site level configuration and tools.

Location identifier and Navigational path – this allows for shortcut navigation to higher levels of the portal

User Level Display

The User level display provides access to the user level configuration only. Navigation to this screen is achieved by selecting the 'Client' menu and then **Business User** from either the left hand Business menu or the top Business Site menu bar.

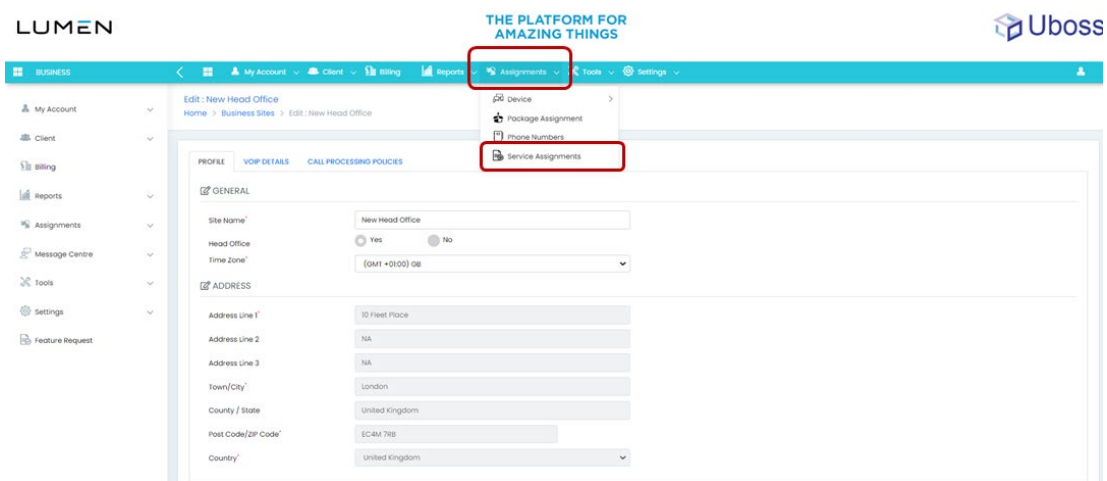


Accessing Group Services

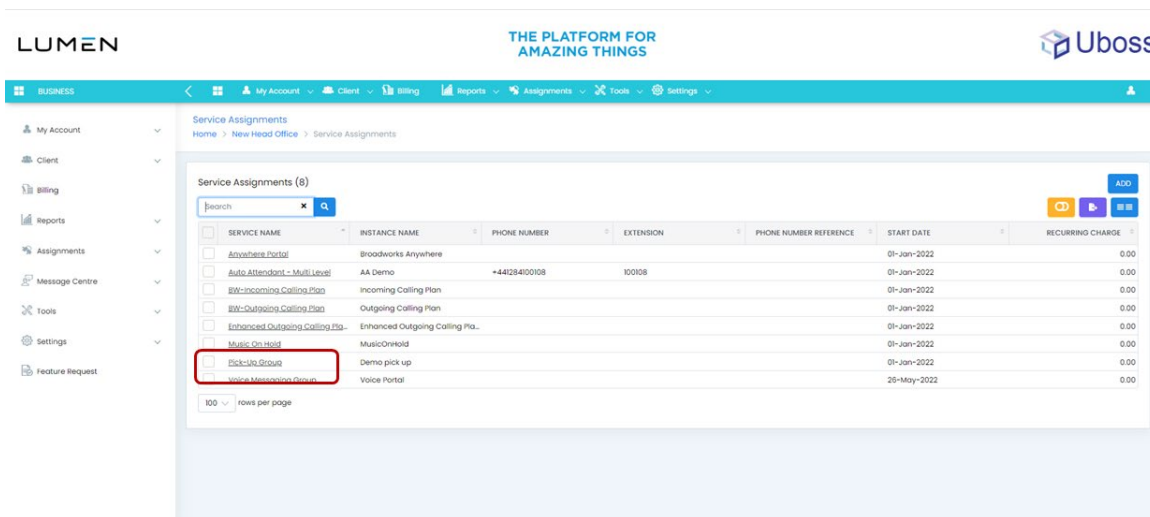
Group Services are services that are assigned at the Business Site or Group level. Group Services include:

- Hunt Groups
- Call Pickup Groups,
- Auto Attendant

To access navigate to the Business Site and select **Assignments – Service Assignments** to reveal the configured group services.



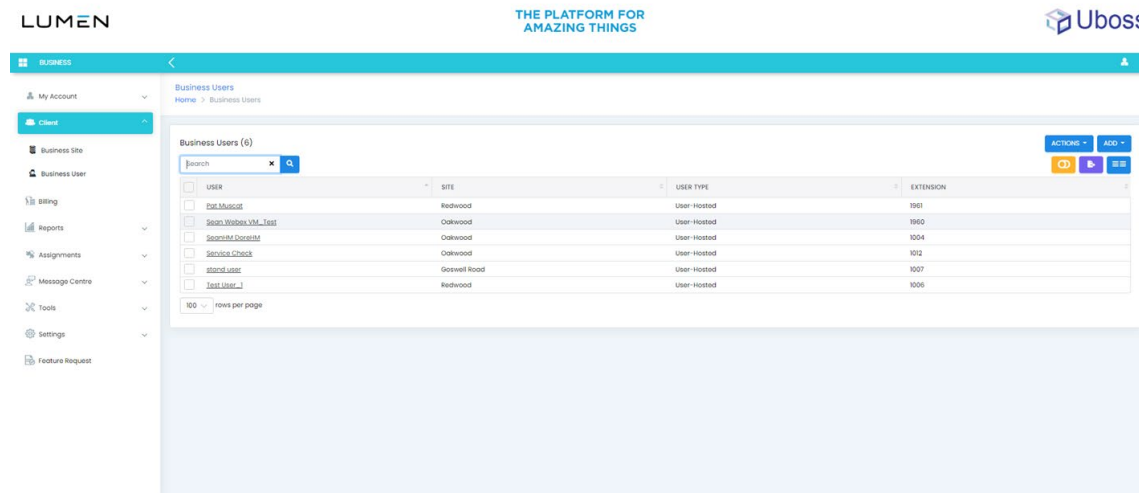
From the Service Assignment screen, select the desired service by clicking the underlined Service Name as required – example shown in the below.



To add a new group service – select the **ADD** button and follow the instructions

Accessing Business User Services

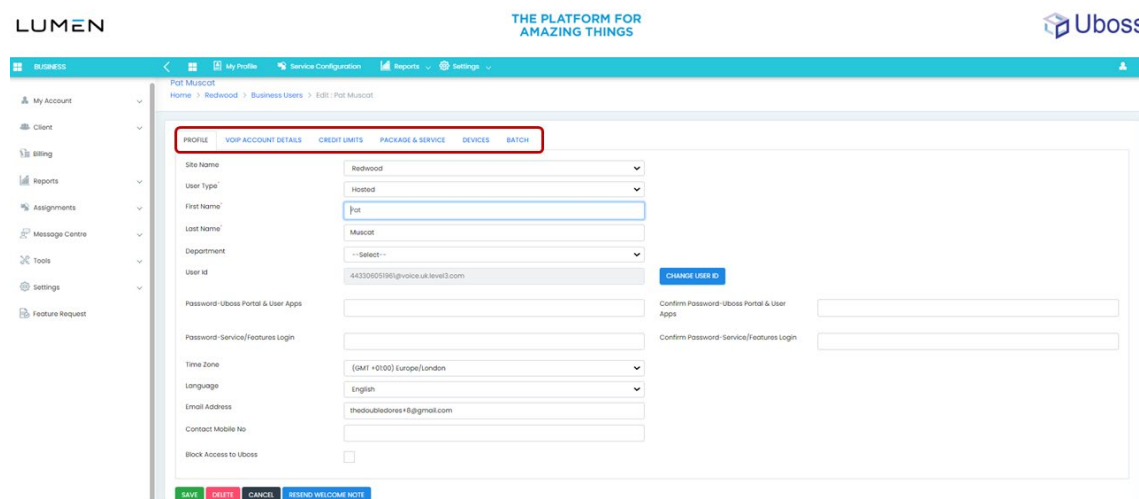
Business Users are assigned at Business Site level and can be accessed by either navigating to the Business Site and selecting **Client – Business User** from the top menu which will list all the users assigned to that site; or by selecting **Client – Business User** from the business menu to reveal all the users assigned to the business.



Should a new user be required to be added select the **ADD** button and complete the fields as required.

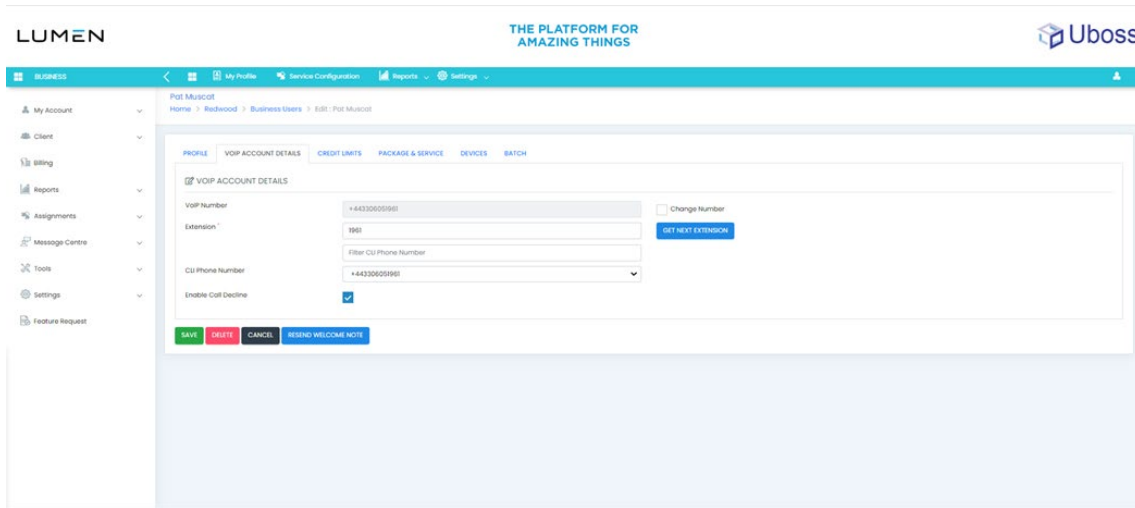
To view or amend a user, once at the Business User level, select the desired user to reveal the user screen

From here the existing configuration is contained in the user menu

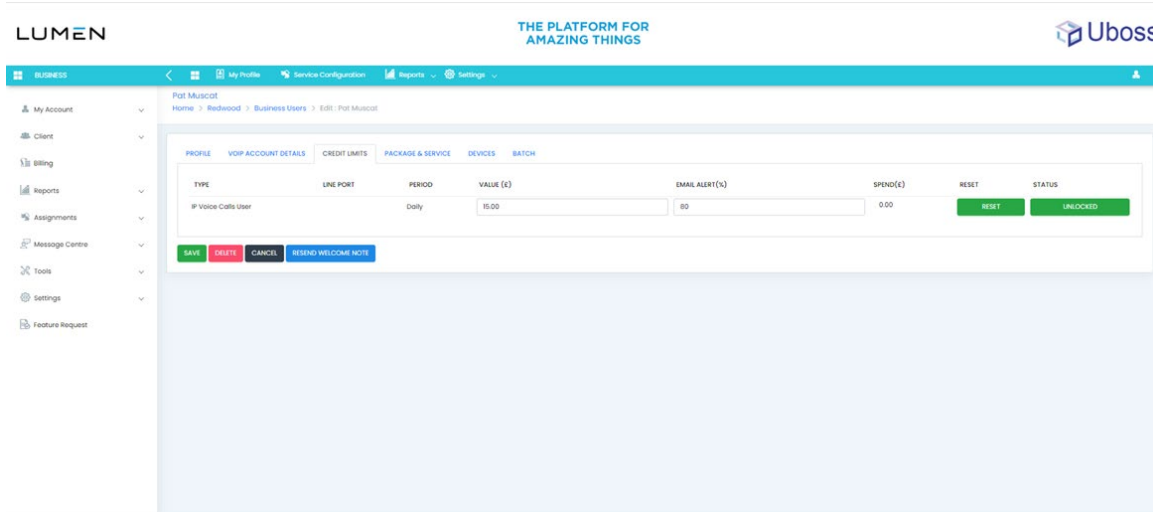


Profile – shows details of the user

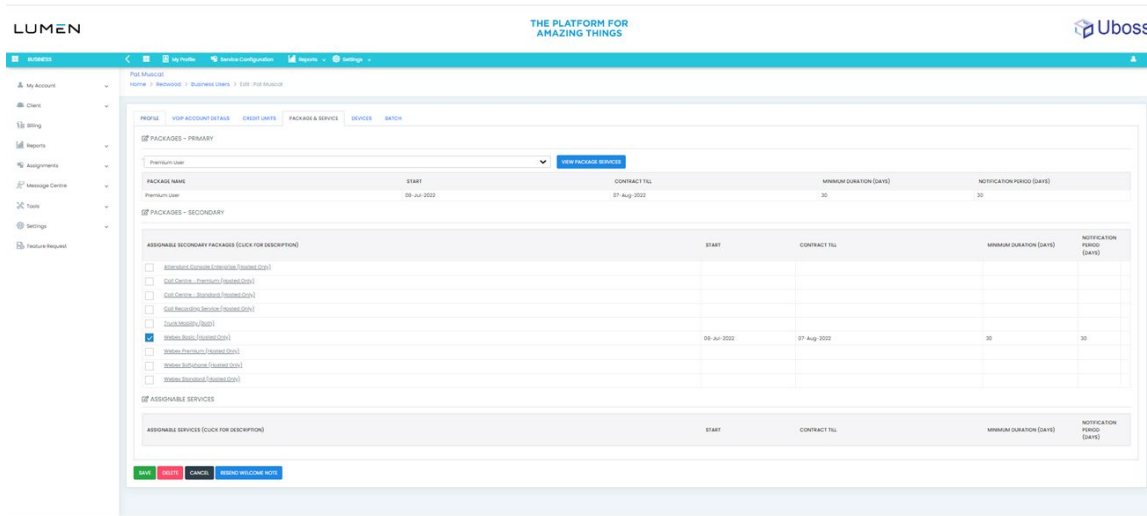
VOIP Account Details – shows the number information



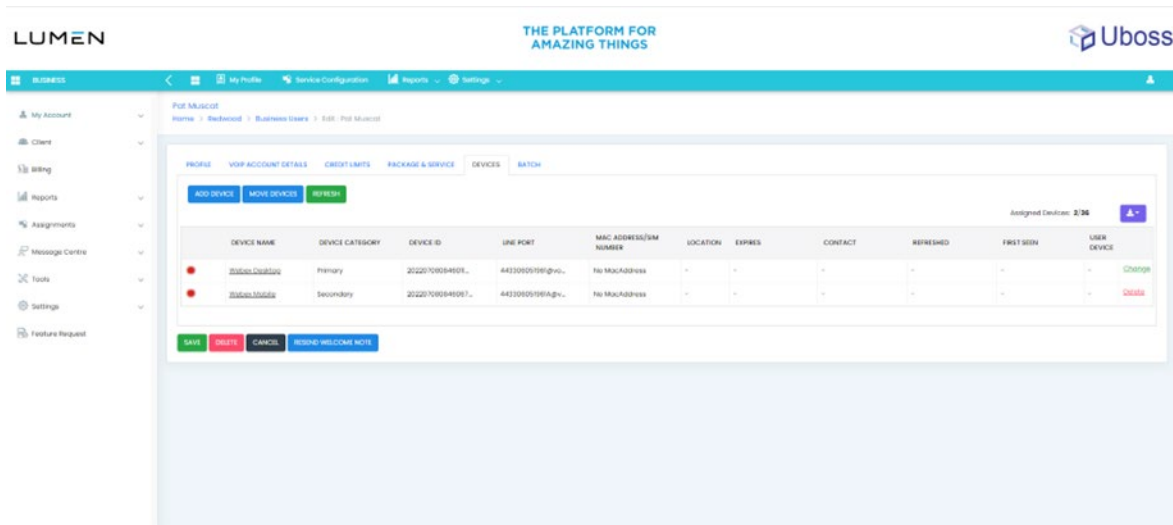
Credit Limits – shows the status and levels of daily credit allowance. Should a user reach the configured credit limit an outgoing call block will be automatically applied.



Package & Service – shows the details of the services assigned to the user. The Primary package is the package that defines the core services for the user while secondary packages are those that can be added to provide added features. Should they be relevant, charges are amended at point of assignment or change of a Package or Service

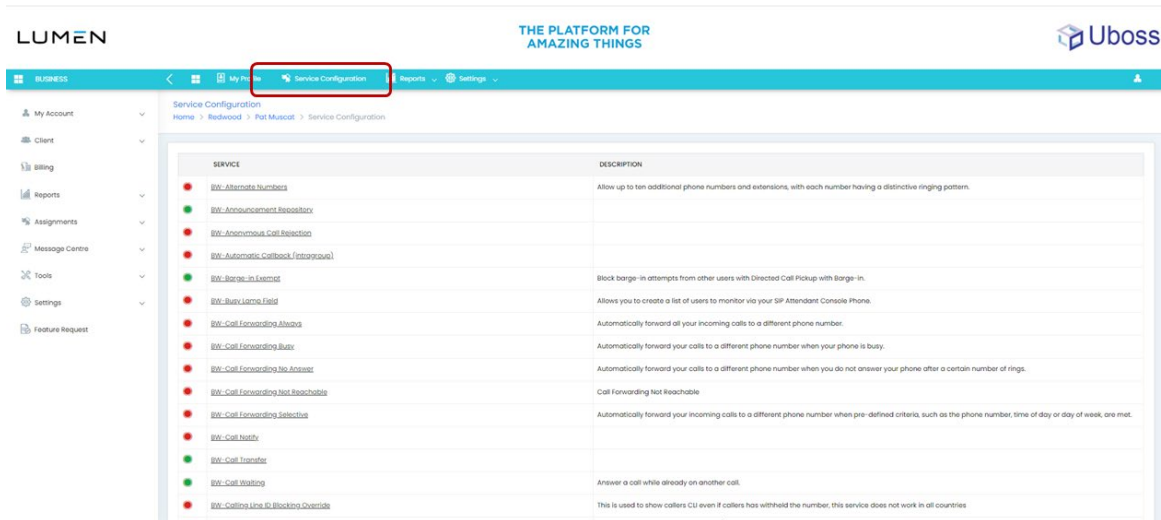


Devices - Shows the details of the assigned devices



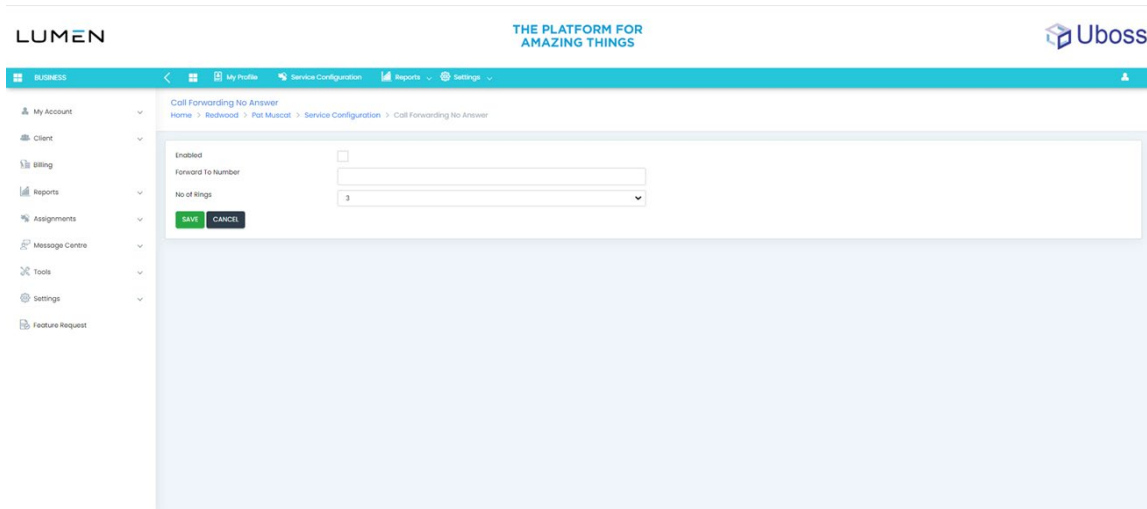
Service Configuration Menu

The Service Configuration menu shows the services assigned to the user and is accessed from the user by selecting **Service Configuration** from the top menu bar



All available services are listed with a green traffic light indicating an active service and a red traffic light, an available service.

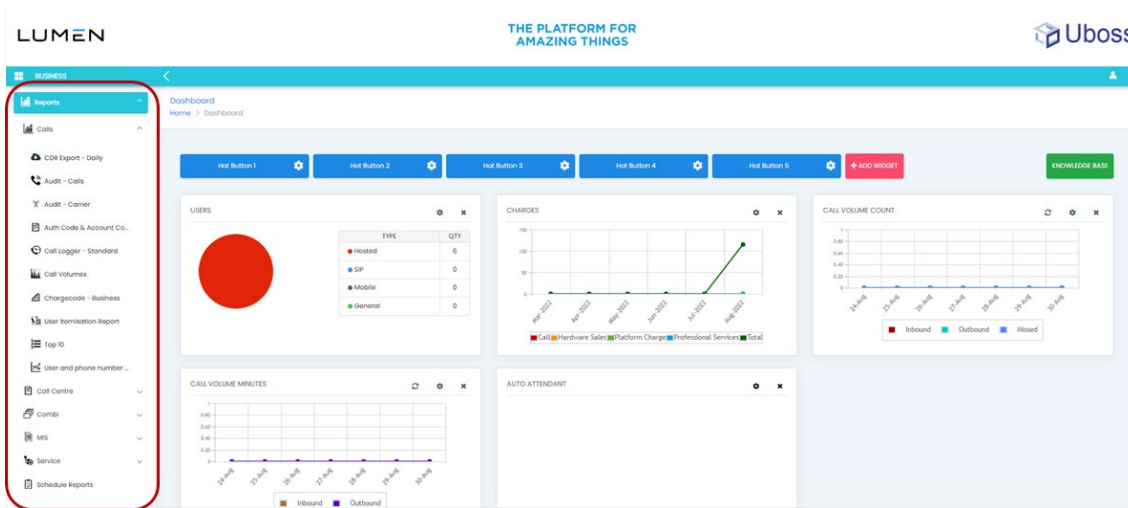
To activate a service simply click the underlined service. As an example, Call Forwarding No Answer provides the following options – simply complete the fields as required and check the Enabled box to activate




Reports

Reports are available at Business, Business Site and User level. Available reports are adjusted based on the level they are being accessed.

Selecting a report type will reveal a report specific filter/configuration page. Completing the variables as required will allow the report to be generated on screen.



Where a report is downloadable, the  icon will be visible. Selecting this will prompt a download type of either CSV, PDF or Excel depending on the report type.

Feature Requests

By selecting **Feature Requests** from the right hand menu bar allows you to request feature enhancements to the UBOSS application.

