

Gear up your PBX

Cut Costs, Boost Profits

Version 20160711

Extension Rights and Groups



Goal of this Module

- Control extensions capabilities on other extensions
 - Create Departments (Groups)
 - Assign Users (Extension)
 - Define User Role
 - Set Rights
 - Delegate Management Console Access

Concepts: Groups

- 3CX Management Console → Groups
- Create Groups as Departments
 - Add User to Group:
 - Can be part of multiple Groups
 - Can see others in Groups
 - Can perform action to others in Groups

Groups Right Presets

- Splitted into
 - Manager Role
 - User Role
- Presets Rights on a per Group Base
- Assign Preset to a Group-Member

<input checked="" type="checkbox"/>	Can see group members
<input checked="" type="checkbox"/>	Can see group calls
<input checked="" type="checkbox"/>	Show presence to group members
<input checked="" type="checkbox"/>	Show calls to group members
<input checked="" type="checkbox"/>	Perform operations on active calls to group members (divert, transfer, pickup)
<input checked="" type="checkbox"/>	Can Barge in, listen or whisper (requires 3CX PRO Edition)
<input checked="" type="checkbox"/>	Can intercom
<input checked="" type="checkbox"/>	Can park calls
<input checked="" type="checkbox"/>	Can control IVR
<input type="checkbox"/>	Can manage the company phonebook

Group Rights Control

- Management Rights
 - Manage Phonebook (Company PhoneBook)
 - IVR Control
- Presence Rights
 - Extension Visibility
 - Extension Calls
- Action Rights (req. Visibility of User and Calls)
 - Parking
 - Intercom
 - Call Manipulation - Divert, Transfer, Take calls
 - Barge In, Listen, Whisper (PRO)

Extension: Specific Group Rights

- On a per User basis
- Overrides Group Presets
 - Finetuning

Rights

Group Membership

DEFAULT

Role

Manager

☒ Can see group members

☐ Can see group calls

☐ Show presence to group members

☐ Show calls to group members

☐ Perform operations on active calls to group members (divert, transfer, pickup)

☐ Can Barge in, listen or whisper (requires 3CX PRO Edition)

☐ Can intercom

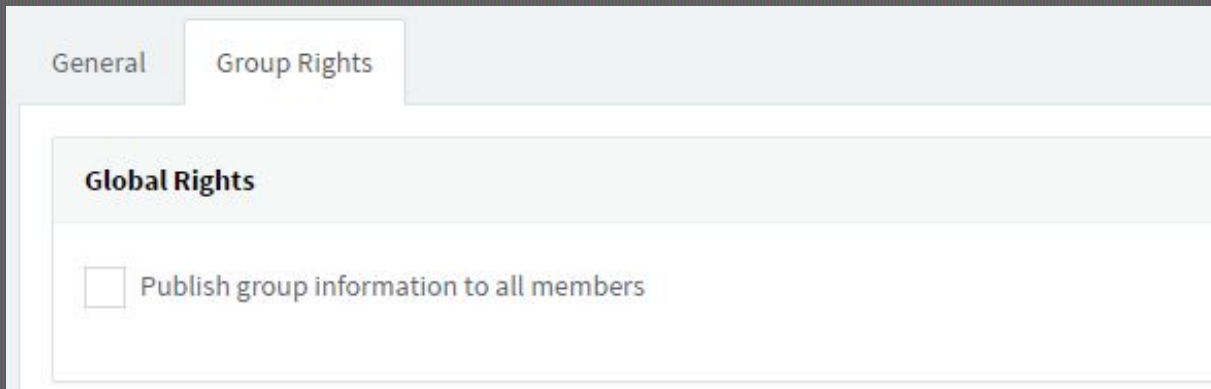
☐ Can park calls

☐ Can control IVR

☒ Can manage the company phonebook

Group Publishing

- Makes All Extensions Visible to Everyone
 - No Calls visible
 - No Control Actions



The image shows a screenshot of a software interface with two tabs: 'General' and 'Group Rights'. The 'Group Rights' tab is selected. Below the tabs, there is a section titled 'Global Rights'. Inside this section, there is a single checkbox that is currently unchecked, followed by the text 'Publish group information to all members'.

General	Group Rights
Global Rights	
<input type="checkbox"/> Publish group information to all members	

Group Samples

- Group A
 - User A
 - Show Presence ON
 - Can See Member ON
- Group B
 - User B
 - Show Presence ON
 - Can See Members ON
- Result: A can not see B and vice Versa

Group Samples

- Group A
 - User A
 - Show Presence ON
 - Can See Member ON
 - User B
 - Show Presence OFF
 - Can See Members ON
- Result: A can not see B but B can see A

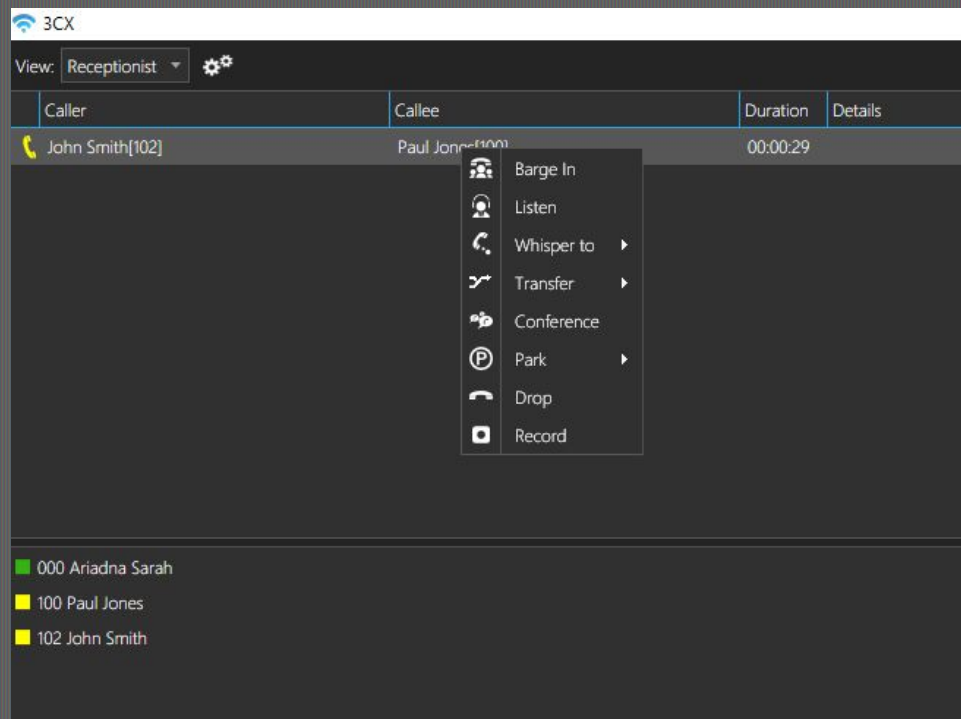
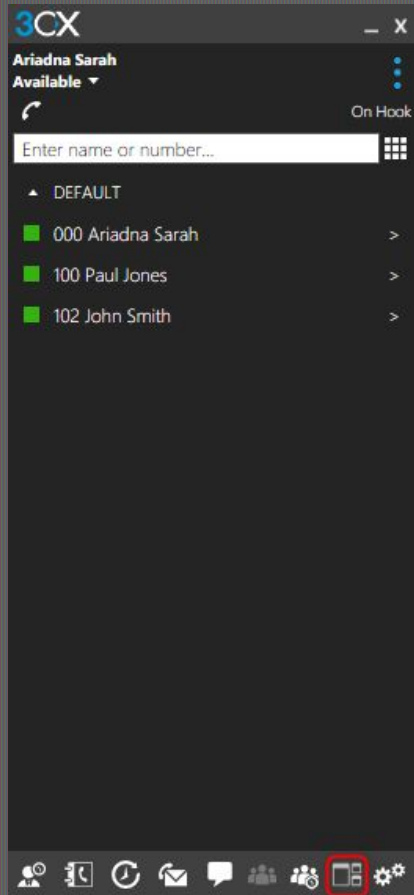
Group Samples

- Group A
 - User A
 - Show Presence ON
 - Can See Member OFF
 - User B
 - Show Presence ON
 - Can See Members OFF
- Result: Group A is not shown to A and B as it is “empty”

Group Samples

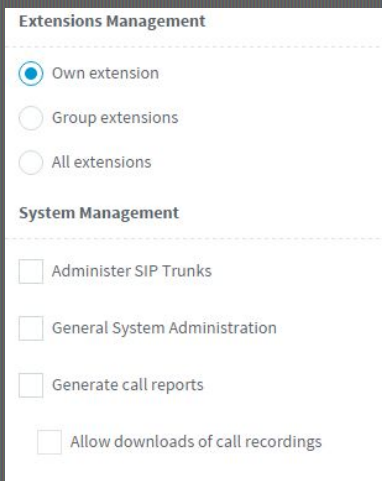
- Group A
 - User A
 - Show Presence ON
 - Can See Members OFF
 - User B
 - Show Presence ON
 - Can See Members OFF
- Group B
 - User A
 - Show Presence ON
 - Can See Members ON
 - User B
 - Show Presence ON
 - Can See Members ON
- Result: Group A is not shown to A & B as it is “empty” but A & B can see each other in Group B

Presence: 3CX Client



Management Console Delegation

- 3CX Management Console → Extension → Rights
- Allows Users to Configure other Users
 - Extension Management
 - Granular Extension Management
 - System Management
 - SIP Trunks
 - Administrator Rights
 - Reports
 - Recordings



The screenshot displays two sections of the 3CX Management Console interface. The top section, titled 'Extensions Management', contains three radio button options: 'Own extension' (which is selected), 'Group extensions', and 'All extensions'. The bottom section, titled 'System Management', contains four unchecked checkbox options: 'Administer SIP Trunks', 'General System Administration', 'Generate call reports', and 'Allow downloads of call recordings'.

Extensions Management

☒ Own extension

☐ Group extensions

☐ All extensions


System Management

☐ Administer SIP Trunks

☐ General System Administration

☐ Generate call reports

☐ Allow downloads of call recordings



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More Training Material at:
www.3CX.com/3CXAcademy

