

8x8 Account Manager - User Profile FAQ

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8x8, Inc.

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If I create a User Profile will the user automatically be prompted to create a password?

Why can't I delete a profile?

New User Profiles appeared in my Account Manager. Where did they come from?

What changed with the introduction of User Profile?

1. A User Profile is now required to assign an individual to an extension or to give a user access to certain 8x8 features, including granting Account Manager privileges. Mandatory fields for creating a User Profile are the first and last names, an email address and username. You only need to create one User Profile per individual. You can use the same User Profile to assign an individual to multiple extensions, or give them an extension and Account Manager privileges, etc. You can create and manage User Profiles by logging into your Account Manager and clicking the **My Account** tab in the top navigation bar, and then **User Profiles**.
2. You can now use an email address (up to 30 characters) as a Username. When creating a new User Profile, by default the username will be the email address. Phone system administrators have the ability to change the username to something other than an email address. To view the username column on the **User Profile** page, click on **Edit Viewable/Hidden Fields** and check the box next to **Username**.
3. To improve password security, phone system administrators can no longer create user passwords. Users must create their own passwords. Users are sent an email prompting them to create their own password if the phone system administrator has assigned their User Profile to a feature that requires a password. Security of customer data and adherence to national security standards is one of the most important attributes of our service. Limiting access to how passwords are created and maintained is a result of our ongoing process of reviewing and enhancing service security. We are pleased to report that 8x8 is one of the very few—and perhaps the only—VoIP providers whose business phone service solutions are compliant with some of the strictest industry standards.
4. In the top navigation bar in the Account Manager, the former Privileges tab has been renamed **My Account. Privileges** and **User Profiles** can now be found under this new tab.

What did not change with the introduction of User Profiles?

The introduction of User Profiles did not impact the functionality of the 8x8 phone service. Prior to 8x8 creating User Profiles for all extensions, extensions without a User Profile continued to operate as normal without any interruption in service. In August, 8x8 auto created profiles for extensions that did not have a User Profile assigned to it (excluding extensions identified as Unassigned). The User profiles were created using the Caller ID for first and last names, and the Voicemail-to-Email address associated to the extension. The creation of these User Profiles did not impact or change the configuration settings of your phone system or extensions, and was invisible to users. For most customers, the User Profile will accurately reflect the extension user. However, some phone system administrators will need to do additional clean-up to the names on these profiles, especially in the instance where the Caller ID is the company name.

What's the benefit of having a User Profile?

To provide you new and enhanced features, it was necessary to make this a requirement. For example, we will soon introduce an enhanced Contact Directory that will give phone system administrators the flexibility to incorporate User Profile data in the directory. Additionally User Profiles allow you to enter information about an individual user once and then apply that information to multiple 8x8 features. For example, when you assign a User Profile to an extension, the first name and last names will automatically populate the Caller ID fields and the email address will populate the voicemail to email and fax notification fields. User profiles also gives users with multiple extensions the ability to use the same username and password to log into all instances of their Virtual Office Online extensions, and phone system administrator's now can remove a user's access to all 8x8 features in one step by disabling the User Profile.

How do I create a User Profile?

You can create User Profiles either one at a time or in bulk using the User Profile Configuration tool in your Account Manager.

To create or edit User Profiles in bulk, you will need to:

1. Download the CSV User Profile template.
2. Make your additions or changes.
3. Upload the csv file using the User Profile Configuration tool.

Mandatory fields for creating a User Profile are first and last names and an email address. [Click here](#) for additional information and step-by-step instructions.

Do I need a User Profile for an extension not assigned to a person but is in a location like a conference room?

Yes. Creating User Profiles for extensions not assigned to people but in locations like a receptionist desk, front lobby, conference room, etc. will help you better identify extensions and will enable these extensions to appear in the new Contact Directory (launching fall 2014). For example, create a user profile using Front as the first name, Lobby as the last name, enter the primary administrators email address and change the username to Front Lobby. Then go to the extension and assign the Front Lobby user profile to the extension.

Is the new User Profile the same as the old Virtual Office Online User Profile?

The new User Profile replaced the old Virtual Office Online User Profile. All Virtual Office Online Profiles, including username and passwords, were migrated to the new User Profiles. Users will continue to use the same usernames and passwords to log into Virtual Office Online, Virtual Office Desktop, and Virtual Office Mobile. However, for users that have more than one extension, by assigning the same User Profile to all their extensions, they will now be able to use the same username and password to log into the Virtual Office Online for all their extensions. When they log into Virtual Office online, they will then be presented a list of all their extensions, and then they can choose the one they want to sign into.

Do I need to create a User Profile if the user will have an extension but I do not want the user to access Virtual Office Online features?

Yes. You will need to assign the User Profile to the extension in order to configure extension settings. However, you can disable access to Virtual Office Online by removing the check mark from the **Enable Virtual Office Online** box located on the **Extension Information** section of the **Edit Extensions** page (for more instructions see Assigning a User to an Extension under Phone System in the Account Manager Guide). If you are setting up the extension for the first time for this user, and have unchecked the Enable Virtual Office box, the email sent to the end user notifying them of the new extension will not contain instructions for creating a password

Why can't I create and change passwords using the Account Manager anymore?

Security of customer data and adherence to national security standards is one of the most important attributes of our service. Limiting access to how passwords are created and maintained is a result of our ongoing process of reviewing and enhancing service security. We are pleased to report that 8x8 is one of the very few—and perhaps the only—VoIP providers whose business phone service solutions are compliant with some of the strictest industry standards.

If I had a Virtual Office Online User Profile, do I need to create a User Profile for the same individual?

No. You will continue to use the username and password created for the Virtual Office Online User Profile.

To view your profiles:

1. Click on the **My Account** tab in the top navigation bar in the Account Manager.
2. Click **User Profiles**.

Is there a limit to the number of User Profiles I can create?

No. You can create more User Profiles than extensions, but only one User Profile can be assigned to an extension at any one time. Also, you only have to create one User Profile per individual. The same User Profile can be assigned to multiple extensions or features.

How do I create a password for a new user?

The first time you assign a User Profile to an extension, or give user administrative privileges to your Account Manager, an email notification with instructions explaining how to create a password is automatically sent to the user using the User Profile email address. If a user has already created a password for the same pbx, they will receive an email with instructions to use the same login credentials for the new extension or feature. If you need to resend email instructions to a user, click the **Reset Password** link in the Action column next to the User Profile on the User Profiles page in Account Manager.

What if a user has forgotten his or her password and needs a new one?

On every 8x8 login page, there are instructions and a link to reset a forgotten password. Once a request to reset a password is submitted, a reset email is sent to the email address listed in the user's User Profile. Phone system administrators can also request that a reset link be emailed to the user by clicking on the **Reset** link on the User Profile page in the Account Manager.

How do I create or edit a User Profile Username?

There are four required fields for creating a User Profile, first and last names, email address and a username. By default when you create a new user profile the email address will automatically populate the username field. However, you can change the username to something other than the email address. It's important to note that usernames are restricted to a maximum of 30 characters. If your email address is longer than 30 characters you will need to edit the username to something other than the address. If you do not see the username column in your User Profile table, click the **Edit Viewable/Hidden Fields** button, and click the check box next to Username. Click **Save**

What do I do if an employee leaves the company?

You should immediately disable the user's User Profile by clicking the **Disable** link in the Action column on the User Profile page in your account Manager. Doing so will remove the user's access from all 8x8 features the profile was assigned to. Any extension(s) that the User Profile was assigned to will automatically be reassigned to your system's Primary Administrator until a new User Profile is assigned to that extension. The Primary Administrator will then have access to retrieve voicemails for that extension using Virtual Office Online. Additionally, any voicemail to email or fax notification emails will be sent to the Primary Administrator's email.

Can I still retrieve emails and faxes from an extension if I remove the User Profile?

Yes. If a User Profile is disabled, any extension(s) that the User Profile was assigned to will automatically be reassigned to your system's Primary Administrator until a new User Profile is assigned to that extension. The Primary Administrator will then have access to retrieve voicemails for that extension using Virtual Office Online. Additionally, any voicemail to email or fax notification emails will be sent to the Primary Administrator's email.

If I create a User Profile, does that mean the user will automatically have access to Virtual Office Online?

No. Creating a User Profile does not automatically prompt that user to create a password. An end user is only prompted to create a password once you assign them to a feature that requires a password. For example, users with phone extensions equipped with Virtual Office Online will need a password to access online features or to use the mobile app. When you assign a User Profile to one of these extensions, an email is then sent to the end user with instructions for creating a password. If the end user has already created a password for access to other 8x8 features on your system, the email will instruct the end user to use the same password for the new extension. However, phone system administrators still have the option of disabling an end user's access to Virtual Office Online and the mobile app by removing the check mark from the **Enable Virtual Office Online** box located on the **Extension Information** section of the **Edit Extensions** page (for more instructions see *Assigning a User to an Extension under Phone System in the Account Manager Guide*). If you are setting up the extension for the first time for this user, and have unchecked the Enable Virtual Office box, the email sent to the end user notifying them of the new extension will not contain instructions for creating a password.

How can I assign a User Profile to an account but prevent giving the user a password?

When you assign the User Profile to the extensions, remove the check mark from the **Enable Virtual Office Online** box located on the **Extension Information** section of the **Edit Extensions** page (for more instructions see *Assigning a User to an Extension under Phone System in the Account Manager Guide*). This will disable the user's ability to use Virtual Office Online and the mobile app and thereby they will not need a password. If you are setting up the extension for the first time for this user, and have unchecked the Enable Virtual Office box, the email sent to the end user notifying them of the new extension will not contain instructions for creating a password.

If I disable Virtual Office Online for an extension can the user still use the mobile app?

No. By disabling Virtual Office Online you are disabling all related online features including Virtual Office Desktop and the Virtual Office Mobile App.

If I create a User Profile will the user automatically be prompted to create a password?

No, creating a User Profile does not automatically prompt that user to create a password. An end user is only prompted to create a password once you assign them to a feature that requires a password. For example, users with phone extensions equipped with Virtual Office Online will need a password to access online features or to use the mobile app.

Why can't I delete a profile?

To maintain reporting history you can only disable a profile but you cannot delete a profile. Our Engineering team is working on a upgrade that will give you the ability to delete the profile while maintaining history.

New User Profiles appeared in my Account Manager. Where did they come from?

If you had an extension without a User Profile (excluding extensions identified as Unassigned) we have automatically created one for you using the Caller ID and the Voicemail-to-Email address associated to the extension. The creation of these User Profiles did not impact or change the configuration settings of your phone system or extensions, and was invisible to users. For most customers, the User Profile will accurately reflect the extension user. However, some phone system administrators will need to do additional clean-up to the names on these profiles, especially in the instance where the Caller ID is the company name.



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