

# Bulk Operations Extensions

When dealing with large amounts of extensions, NocTel's Bulk Operations tools can significantly reduce the time needed to manage your account. The Bulk Extension Operation is located on the **Extensions** page of the control panel. When on the Extensions' main page, look for the **Bulk Operations** link located above the extension table.

## Extensions

#	Description	Type	Status	Inbound Action
-	Inbound Routing	Virtual		Custom
100	Main Menu	Virtual		Menu

## Using Bulk Operations Overview

This overview is meant to act as a general guide for the steps that need to be taken to setup and perform a bulk operation. Each process will be different depending on what you are hoping to accomplish. After the overview, each of the criteria and actions will be described in detail. The basic steps are as follows

1. **Selecting Criteria:** Select your **match criteria**. This will specifically filter what you want to change. The preview page will return a list of extensions that match **all** criteria selected. The search criteria sections are divided into categories and located at the top of the bulk operation page and are noted by a *magnifying glass symbol*. An example of search criteria is shown below.

**By Class:**

☒ Any Class (Except those Excluded Below)

☐ Only These Classes:

☐ Test Class

☐ Name Directory

**EXCLUDING These Classes:**

☐ Test Class

☐ Name Directory



### Tip: Search Tool

You can use the match criteria by itself it is a powerful search tool.

2. **Selection Action:** Select the operations you want to perform. The operations selected will be applied to the *matching criteria*. The preview page will show the changes that will be made, below the list of affected extensions. The operations are divided into categories below the **Match Criteria** sections, denoted by light gray boxes, like the one shown below.

**General Operations**

☒ Only Reload Device Configuration on Change

☐ Force the SIP Device to Reload Configuration Parameters

☐ Reboot the SIP Device (Non-Polycom devices will Reload Configuration Parameters)

3. **Review the Operation:** Click the **Preview Bulk Operation** button at the bottom of the page.

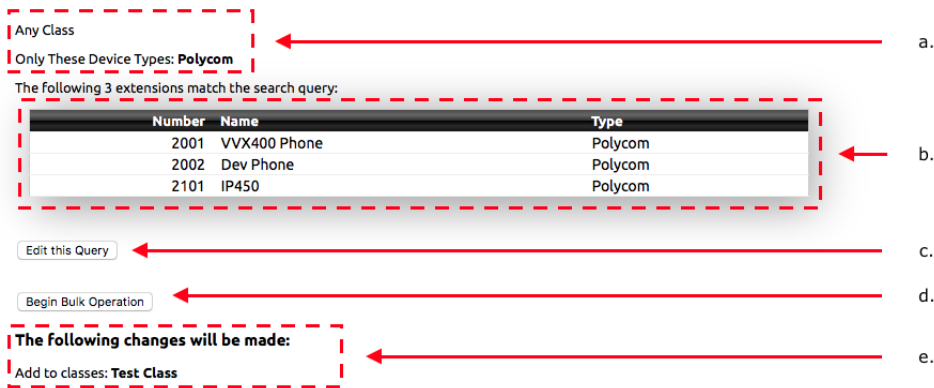
**Preview Bulk Operation**



The Preview page will show:

- a. The criteria
- b. A list of extensions that match the criteria
- c. **Edit this Query** button
- d. **Begin Bulk Operation** button
- e. A list of changes to be made to the extensions

## Bulk Extension Operation



The interface shows a search filter set to 'Any Class' and 'Only These Device Types: Polycom'. Below this, a table lists three extensions matching the query. The table has columns for Number, Name, and Type. Below the table is an 'Edit this Query' button and a 'Begin Bulk Operation' button. At the bottom, a section titled 'The following changes will be made:' shows 'Add to classes: Test Class'.

Number	Name	Type
2001	VVX400 Phone	Polycom
2002	Dev Phone	Polycom
2101	IP450	Polycom

At this point review and confirm that what is included in the filter(s) is correct and that the changes to be made are correct. Use the **Edit this Query** button to bring up the bulk options to make changes.

4. **Complete the Operation:** If the info on the preview page is accurate click on **Begin Bulk Operation**. The action will queue and begin processing.

## Match Criteria

**By Class:** Use to filter a "class" of devices. Each extension in an account can be assigned to classes. Classes are useful when you have specific sets of phones that need different permissions and functionality.

Examples: If the account has devices that are spread over several locations/buildings, each location can be assigned to a class so when changes need to be made to those devices they can be easily filtered and changes made with the bulk editor.

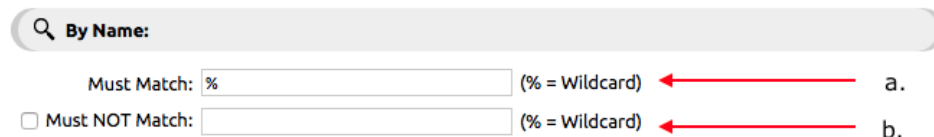
- a. **Any Class:** includes every class in the filter
- b. **Only These Classes/EXCLUDING These Classes:** Allows you to include certain classes or exclude certain class by clicking the check box next to the classes in the include or exclude list.



The 'By Class' section has a search icon and the text 'By Class:'. Below are two radio buttons: 'Any Class (Except those Excluded Below)' and 'Only These Classes:'. Under 'Only These Classes:' are checkboxes for 'Test Class' and 'Name Directory'. To the right, under 'EXCLUDING These Classes:', are also checkboxes for 'Test Class' and 'Name Directory'.

**By Name:** use to filter a set of devices with a particular word in their extension name. If you have labeled all the phones in the sales department with "sales" in the extension names, you could make changes to them by using the name criteria.

- a. **Must Match:** Here you can search for an extension based on its name. While not case sensitive, it is space sensitive. If you only search for part of the description, you must include wildcards. For example, an extension name that reads: Receptionist Extension. If you searched Receptionist, you wouldn't get any results. But if you search %receptionist% or %RECEPTIONIST% etc. you would get results.
- b. **Must NOT Match:** Same rules as Must Match, but here you can exclude certain terms. Say you were searching for %Oregon% extensions, but you didn't want anything from Portland, you would check the checkbox next to Must NOT Match and put in %portland% (again not case sensitive).



The 'By Name' section has a search icon and the text 'By Name:'. Below are two options: 'Must Match: %' and 'Must NOT Match: %'. Both have a text input field and a label '(% = Wildcard)'.

**By Device Type:** Use to filter a set of devices based on the extension type. You can use this area to limit the criteria to a certain type of extension device or to include all types.

- a. **All:** includes all virtual and physical extension in the criteria.
- b. **Any Virtual Extension:** limits the criteria to only virtual extensions.
- c. **Any Device Extensions:** limits the criteria to only physical extensions.

- d. **Device Extension of the Following Types:** allows you to filter one specific type or several. Make sure that you select the type of device using the checkboxes in the list.

**By Device Type:**

☒ All a.  
☐ Any Virtual Extension b.  
☐ Any Device Extension c.  
☐ Device Extensions of the Following Types: d.  
☐ Generic SIP ☐ Algo Paging Speaker ☐ Cisco ATA/SPA ☐ Fax Machine Adaptor ☐ Panasonic  
☐ Polycom ☐ SIP Trunk

**By Extension Number:** Use to filter a set of extensions based on their numbers. Example: your account may have phones at different sites; Site A may have extension numbers 200-299 while site B may have extension numbered 300-399.

- a. **All:** Includes all extensions.  
b. **Only Unnumbered extensions:** Displays only extensions lacking a number.  
c. **Only Extensions in the Following Ranges:** Displays only extensions within the range entered in the text boxes for **Lowest** and **Highest**.  
t.

**By Extension Number:**

☒ All a.  
☐ Only Unnumbered Extensions b.  
☐ Only Extensions in the Following Range: c.  
Lowest:  Highest:

**By Cloud Server:** Use to select a set of extensions based on its server within the NocTel system. Each physical extension is assigned a primary and secondary server. For both primary and secondary servers, the drop-down box will allow you to select **Any**, which selects extension on any server or chose from the list of current servers used by your account for selection. Selecting a server will select only extensions that match that server.

**By Cloud Server:**

Primary Server

Secondary Server

## Perform the Following Operations

**General Operations:** Use to reload device configuration or reboot device.

- a. Only Reload Device Configuration on Change: Forces devices that have had changes made to them to reload their configuration.  
b. Force the SIP Device to Reload Configuration Parameters: makes all SIP devices to reload their settings from NocTel.  
c. Reboot the SIP Device: forces Polycom devices to reboot

**General Operations**

☐ Only Reload Device Configuration on Change  
☐ Force the SIP Device to Reload Configuration Parameters  
☐ Reboot the SIP Device (Non-Polycom devices will Reload Configuration Parameters)

**Change Class Membership:** Allows for the selected extensions to be added or remove from a class. The classes in the account are listed with three options; **No Change**, **Remove From**, and **Add To**. There is also a text box under **Add To** where a new class can be created.

- a. **No Change:** Leave class assignments the same  
b. **Remove From:** Removes the selected class from the extensions selected.

- c. **Add To:** adds a new class to the selected extensions. Using the text box below the list of existing extensions allows for a new class to be created and the extensions added to it.

**Change Class Membership**

(No Change) Remove From Add To

Test Class Existing Class

Name Directory Existing Class

Create New Class

a. b. c.

**Change Cloud Server Assignment:** Use to change the filter extensions' primary and secondary server.

**Change Cloud Server Assignment**

Primary Server — (No Change)

Secondary Server — (No Change)

**Reset User Permission Flags:** Use this to change the selected extensions' User Permission to match with the extension selected from the drop-down box.

**Reset User Permission Flags**

Overwrites all user permission flags for all matched extensions.

Copy from Extension: — No Change

**TIP: User Permissions**

User Permission can be edited under: Control Panel > Extensions > Your Extension > Edit Permissions > User Permissions.

**Reset Dialing Permission Flags:** Use this to change the selected extensions' Dialing Permissions to match with the extension selected from the drop-down box.

**Reset Dialing Permission Flags**

Overwrites all dialing permissions for all matched extensions, except for 911.

Copy from Extension: — No Change

**TIP: Dialing Permissions**

Dialing Permissions can be edited under: Control Panel > Extensions > Your Extension > Edit Permissions > Dialing Permissions.

**Allow 911 Emergency Calling:** Used to change an extension 911 emergency calling permission. *Note that all phones physically located in the United States are required to have 911 calling enabled.*

**Allow 911 Emergency Calling**  
This option is required to be enabled for all phones physically located in the United States.

☒ No Change  
☐ Enable 911 Calling  
☐ Disable 911 Calling

**Reset Inbound Behavior:** Uses an extension selected from the drop-down box as the template for changing the inbound behavior for the other extensions to match.

**Reset Inbound Behavior**  
Overwrites existing inbound behavior for matched extensions.

Copy from Extension:

**Set Voicemail Options:** Use to remove Voicemail pin and/or enable/disable Voicemail.

**Set Voicemail Options**

☐ Remove existing Voicemail PIN

☒ No Change  
☐ Enable Voicemail  
☐ Disable Voicemail

**Reset Device Preferences:** Uses an extension selected from the drop-down box as the template for changing the device preferences for the other extension to match.

**Reset Device Preferences**  
Only preferences which exist for both the source and destination device types will be overwritten

Copy from Extension:

Includes Audio Codec, Early Media, Headset Type, Display Intensity, Line Keys, Expansion Modules, etc.

**Reset Speed Dial Directory:** Uses an extension selected from the drop-down box as the template for changing the extensions speed dial presets to match. *An individual extension's speed dials can be set by going to an extensions page and clicking the Speed Dial Directory link below the extensions number and name.*

### Reset Speed Dial Directory

Overwrites directory entries for the **entire device** associated with the matched extensions.

Copy from Extension:

**Assign Outbound Caller ID:** Use to set the extensions outbound caller ID, can choose from a list of numbers linked to the account.

Using the **Set to a Range of Numbers** options allows for the outbound caller ID to be set to a matching DID. For example, if you have extensions in a 1001-1099 range with DID in the xxx.xxx.1001 to xxx.xxx.1099 range. This function can be used to match the DID with the extension for its caller ID.

### Assign Outbound Caller ID

- ☒ No Change  
☐ Set to the Following Number:

- ☐ Set to a Range of Numbers:

Equivalent to the  adjusted by  and applied to mask:

☐ Set to **Account Default Caller ID** if there is no matching Number in the account.

Special Mask Characters: X = Use Remaining Digits, T = Top (Start Over From Beginning), Z = Zap a Digit (Skip), N = Use Next Digit

**Assign Internal Caller ID:** Use to set the extensions internal caller ID to a specific number. This affects calls within the NoCTel phone system (like extension to extension calls). This is often useful for IT Helpdesks that wish to mask individual agent extensions and make it seem like they are coming from a lead phone number.

### Assign Internal Caller ID

For calls placed to internal extensions.

- ☒ No Change  
☐ Set to the Following Number:

**Assign Emergency Services Response Location:** Use to set the extension 911 address, can choose from a list of addresses already linked to the account.

### Assign Emergency Services Response Location

— (No Change)



## Related articles

- [Exporting a Extension List](#)
- [Routing Numbers](#)
- [Editing an Extension's Name and Number](#)
- [Bulk Operations Extensions](#)
- [Deleting a Number](#)