**PennFlex Phone** is the next generation phone system now in use at Penn. Most Wharton faculty and staff are eligible for a PennFlex phone account (depending on your department's phone policy.) PennFlex Phone benefits include:

- A mobile application that allows you to receive, and place, calls from your Penn phone number using your desktop, tablet, or smartphone.
- The ability to send and receive faxes via email or through a portal.
- Voicemail transcription sent to your email address.

Wharton will be migrating all existing PennNet phones to the new PennFlex phone system during the 2022-2023 academic year.

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**Wharton's PennFlex Phone Migration**

All existing PennNet phone lines, which are most of the existing phone lines at Wharton, are being migrated to PennFlex Phone lines. If you have a PennNet phone, use this section to help you during and after the migration.

PennFlex is the replacement telephone system for PennNet Phone service. The phone number associated with the line will not change; however any physical handsets related to that line will need to be replaced with new handsets.

Wharton Computing plans to work with each department to schedule and conduct their PennFlex migration. Timing is still being determined.

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**The Migration**

If you currently have a physical phone handset (it is likely called "Soundpoint"), you will be part of the migration. You will have the choice to either:

- request that your phone be replaced with the new Polycom model., or
- opt to use the Mobile client only.
Your migration date will be set in partnership with your department and Wharton Computing, and there’s nothing you need to do before the migration day. On the day of migration, here’s what will happen:

- **Phones Replaced.** A technician will replace your old handset with a new Polycom VVX401 desktop handset.

- **Number Migrated.** Your PennNet Phone number will be migrated to your new PennFlex Phone line. This takes about an hour, and your phone number will be unavailable during this time.

- **Some (not all) Settings Migrated.** Many, but not all, of the settings from your PennNet Phone will migrate automatically to your PennFlex Phone. Please note that the following will NOT migrate:
  - **Voicemail Messages** - You can download a backup of your PennNet Phone greetings and messages beginning on the day of your migration.
  - **Voicemail Passcodes** - A new voicemail passcode will be set for you. On the day of migration you can retrieve the new code from the PPS (PennNet Phone Service) web portal.

The full list of settings that will be migrated has more details.

Phones that manage multiple lines are not part of the migration and will remain on PennNet for now.

**Migration Day: What You'll Need To Do**

On the day of the migration, there are several steps you need to take:

1. **Get your Temporary Passcode:** Retrieve your temporary PennFlex voicemail passcode from PPS (PennNet Phone Service) web portal on the day of your migration.
2. **Change Your Passcode:** Using the Mobile App with Webex, change your voicemail passcode (you may need to launch the Mobile App with Webex and then launch your voicemail to enter in your passcode.) You will use your temporary code from Step 1 to do this.
3. **Test your Phone:** Make an outgoing test call to confirm that your phone is functioning. From your mobile phone, call your office phone and confirm that calls are coming through to your line as expected.
4. **Test your VoiceMail:** If you have voicemail configured to email your messages, leave yourself a test message and confirm delivery to your email.

See the section Using the Mobile App with Webex for information on using the mobile apps.

**Using the Mobile App with Webex**

Penn now provides an application to use with this service, called the Mobile App with Webex. Wharton staff and faculty should have the Mobile App with Webex already installed on any computers managed by Wharton Computing.
This app is available for anyone who is migrating, or already has migrated, from PennNet to PennFlex. It is also available for any recently hired staff who have been provided with a new PennFlex phone. Wharton is not offering the Video portion of the app, but otherwise you should be able to follow these installation directions:

https://www.isc.upenn.edu/how-to/pennflex-phone-service-and-migration-resources#Vonage-Mobile-App-with-Webex

If your computer is managed by Wharton computing, you will not need to install the app -- it has already been installed on your computer. Skip the first part about installation.

(Old) MobileConnect App

This app is being phased out and you should now be using the Mobile App with Webex. If you have questions about it, please contact your Wharton Computing representative.

Please Note: If you are using your own smartphone, there may be charges if you do not have an unlimited data plan. You do not need to use your smartphone to be able to talk and get messages -- you can use your computer.

Setting Up Your New PennFlex Phone

If you are new at Penn, or have been issued a new PennFlex phone (and you do not already have a phone/phone line that is part of the upcoming migration), use these directions to get yourself set up.

This phone service provides a number of features to help with the increasingly wide variety of phone needs at Penn. For a complete overview of the new system see ISC’s announcement, PennFlex Phone service.

Handsets

If you have chosen to receive a new handset, you’ll need to set it up. Follow these directions to set up your new PennFlex Phone Handset.

Using the App (Soft Client)

Whether or not you are using a handset, you will likely want to use the software application, Mobile App with Webex, which can be set up on either your smart phone or your computer, or both. Use these instructions to get set up and start using the app.

Mobile App with Webex has replaced the former MobileConnect app, which will no longer be available after 12/31/22.

Computers Managed by Wharton Computing
If your computer is managed by Wharton Computing, you do not need to install the app -- it has already been installed on your computer.

1. Launch the WebEx app.
   - **Windows**: Press the Windows Key and type WebEx to bring up the app.
   - **Mac**: use Spotlight search and type WebEx

2. Skip the first part about installation in these directions and start with the section How do I sign in to Mobile App with Webex?

If you do not find WebEx installed, and your machine is managed by Wharton Computing, please contact your Wharton Computing representative.

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**Personal (or non-managed) Computers and Mobile Devices**

Use these directions if you are setting up your application for the first time, or are shifting from the MobileConnect client. Make sure to choose the "Webex: Business" version, not the "Webex Meetings: Video Conferencing".

**Forwarding Your Calls**

You may have chosen the "Forward Only" option for your PennFlex phone number, which allows you to forward all your incoming calls to another device. Or, you may have a handset and wish to temporarily forward calls to another device. Here's how to forward your calls.

**Forwarding from your Handset**

To forward all incoming calls using the Home Screen on the PolycomVVX 400:

```
Forward Calls
Forward calls to a contact.

Forward all incoming calls:
1. Select Forward on home screen.
2. Choose Always, No Answer, or Busy.
   - If No Answer, enter a value to specify number of rings before call will forward.
3. Enter a contact’s number.
4. Tap Enable.

Disable call forwarding:
1. Select Forward from home screen.
2. Choose forwarding type.
3. Select Disable.
```

Full instructions for use of the Polycom VVX 400 can be found here: https://s3.amazonaws.com/smartlynk-vonage-assets/wp-content/uploads/2019/10/03211730/VVX-400-QSG.pdf

A video tutorial can be found here: http://knowledgelink.upenn.edu/help/tutorials/VonagePolycomTutorial/story_html5.html

**Forwarding from the App**

To forward calls directly from the app you will need to first add the phone number you want to forward to, and then you can set the forwarding.
1. Log into the app.
2. Click on your profile, and choose Settings.
3. Choose Calling on the left navigation tree.
4. Under the Call Forward box on the right, enter the phone number that you want to forward to.
5. Click Save.
6. Go back and choose Call Forward from the drop down box.
7. Choose your phone number.
8. Save.

To Unforward, choose Do Not Forward from the drop down box.

Using your PennFlex Phone

Your new PennFlex phone will provide many new useful services. You'll have access to a PennKey-based Single Sign-on (SSO) portal to view call analytics, configure voice and voicemail settings and access voicemail. Once your phone is up and running, you'll be able to log into the portal, click the End User button, and explore all the new features and settings available to you.

Recommended Reading

Data Privacy: We want to make sure you understand how your data privacy is managed in this new system.

Headsets: As with all phones there are some specific recommendations about headsets.

Voicemail and Passwords: They’re critical -- here's how to check your voicemail and change your password.

PennFlex Phone Resources

- PennFlex Phone service details
- PennFlex Phone Migration details
- Training Videos: https://www.isc.upenn.edu/how-to/pennflex-phone-service-and-migration-resources#Training-Resources
  - PennFlex Phone handsets
    - Poly VVX 401 Video Tutorial
    - Poly VVX 201 Video Tutorial
- PennFlex FAQ: https://www.isc.upenn.edu/how-to/pennflex-phone-service-and-migration-resources#FAQ