




Mitel MiCloud Office Customer Admin Portal

Quick Start Guide

The MiCloud Office Customer Admin Portal enables a company's administrators to configure its organisation's settings.

To access the portal login via your browser, use the url and the credentials sent to you by your partner administrator, or via your desktop application by clicking on the portal icon  if you are assigned as a customer admin. Select the "Admin view" located in the top right corner.

The Customer Admin Portal contains the following folders and submenus.

Home

My Profile

Edit/view your personal information and change password.

Services

Contact list

Define a set of contacts that are mandatory/VIP or blocked on a company level. Mandatory contacts will appear in the contact lists of all users.

Directory information

Control who is allowed to see which users from the directory and what directory information fields are displayed when a search is performed.

Edit directory fields

Allow authorized end-users to request changes to selected directory field values.

Music on hold

Configure the 'on hold' music.

Working hours

Configure the standard working hours/days and when the system enters night-mode. This affects how calls are handled/routed.

Support

Access to manuals.

Organisation

Voice prompts

Manage all the organization's voice prompts and music files.

User administration

Directory fields

Manage the directory fields.

Group administrator profiles

Create group admins with limited sets of features within specified groups.

User groups

Group a set of users based on a common property. A user can be a member of many user groups.

Users

Search, view, edit, create, delete, import and bulk handle users. Send welcome/getting started messages to users.

Function numbers¹

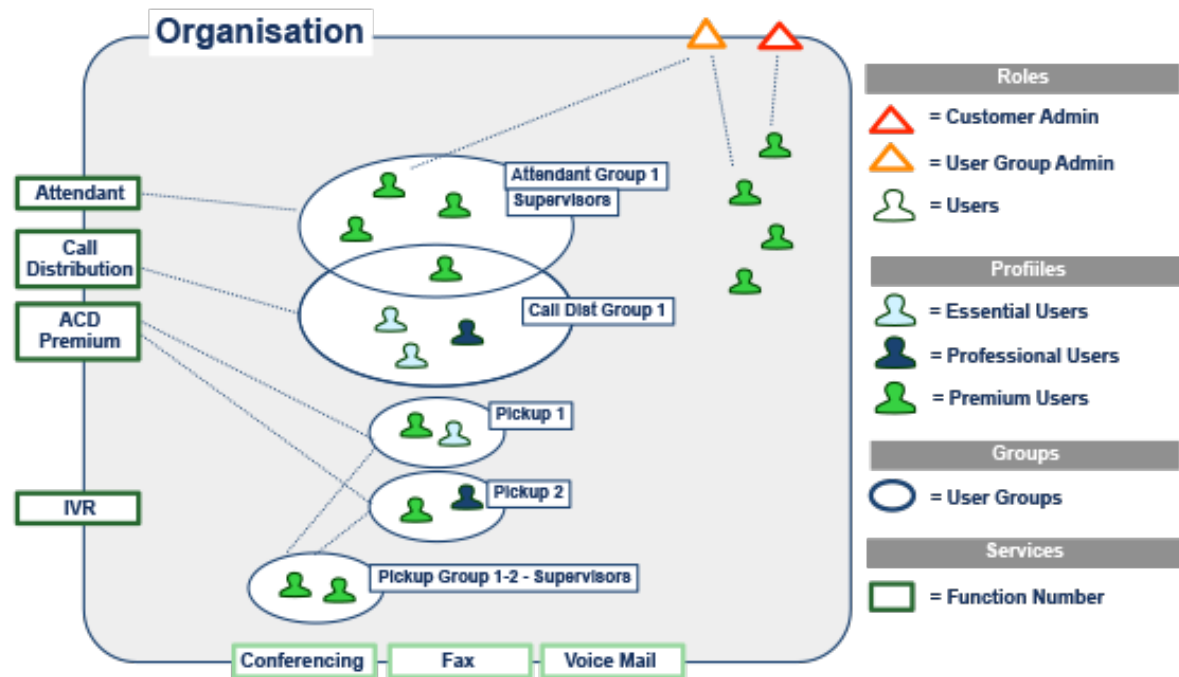
Function numbers is a term used to describe phone numbers that are used in the system and associated to services. The following function numbers can be viewed:

- ACD group numbers/ACD premium
- ACD Light/Call Distribution numbers
- Conference numbers
- Fax numbers
- Group inboxes
- IVR numbers and Number visualisation
- Schedules
- Voicemail numbers

¹ Licensed function numbers such as ACD group numbers are configured by your supplier.

Getting started

Your organisation is structured by user groups and users, where the users are members of zero or more user groups.



Your supplier has configured a range of attendant numbers, calling distribution numbers (ACD Light), ACD Premium numbers, etc., based on your agreement. You will find these function numbers pre-configured to one or several user groups. When a professional or premium user is connected to a Call Distribution group or an ACD Premium group, the user/agent can login/logout to the service. When a Premium user belongs to supervision group the user/agent can login and logout other users/agents belonging to that user group.

Before configuring your system you should:

- Go through your users and map them into different user groups. Pre-define groups based on your configuration, such as call distribution groups (ACD Light) and attendants.
- You can also define who will be the group administrator, with the power to add/remove users to/from that group
- Specify if you have external contacts that should be in your directory. These users will be added/imported during your setup
- Define your working hours and holidays
- Check the list of existing voice prompts and on-hold music and decide if anything new needs to be created
- Ask your supplier to import your users based on a predefined format.

Your supplier will configure all services that are under license control. This includes the addition of new users.

Settings

You can look at settings on three levels: (1) Your organisation, (2) User groups and (3) Users.

Try to start at the user group level, while settings on a user level overrides the settings on a user group level.

If you want to change settings on all users create a user group that contains all users. An alternative is to select users or a group of users in the admin portal and select "Edit users".

If a user belongs to several user groups, it is the user group with the highest priority that defines the settings. The user group priorities are defined by the ascending list under User groups.

Call routing

Your supplier has configured a number of routing rules that apply to your company. It is important to get a list of the rules from you supplier to understand the calling behaviour in your company.

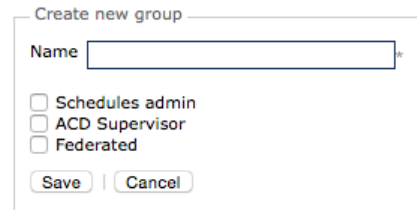
User groups

Your supplier has created a number of user groups based on your configuration. You can also create your own user groups. To create a user group select:

User Administration -> User groups -> New

When creating a group you can set appropriate privileges for the group.

1. Schedule admin: Allows an authorized user to override the schedule information set in the system. Please consult your MiCloud Office OrgAdminGuide for the settings
2. ACD Supervisor: Only Premium users can be supervisors. Supervisors can log agents in and out, can see the current statistics in the group, agent widgets and change nightmode for the group
3. Federated: Is used when linked organisations are used. Please consult your MiCloud Office OrgAdminGuide for the settings



The screenshot shows a dialog box titled "Create new group". It contains a text input field labeled "Name". Below the input field are three checkboxes: "Schedules admin", "ACD Supervisor", and "Federated". At the bottom of the dialog are two buttons: "Save" and "Cancel".

To display a list of the members of a group, click on the "List Users" option. To add users to a group please see the Users section in this guide.

Group administration profiles

Allows a normal office user to manage some group properties and the users within these groups (add/remove users). The group administrator has access to a limited set of features, set by the group admin feature profile and the user groups specified by the profile.

Directory fields

In the directory fields view you can see and manage all labels of the extra directory information fields for users. Fields one, two and three are always visible and can be searched. Fields four, five and six are displayed directory information and cannot be searched. The directory field moderation page provides a list with all new change requests made by users for the extra directory field values, which the administrator can then approve/decline.

Presence states

Presence states are divided into user roles and user activities. The roles and activities will define how inbound calls will be routed or what number should be shown for outbound calls. The different presence states are defined by your supplier to match your organisation.

A role is used to describe the current situation of the user at an organisational level and can be used to define different job roles, for example "Support", to indicate that the user is currently working with customer support.

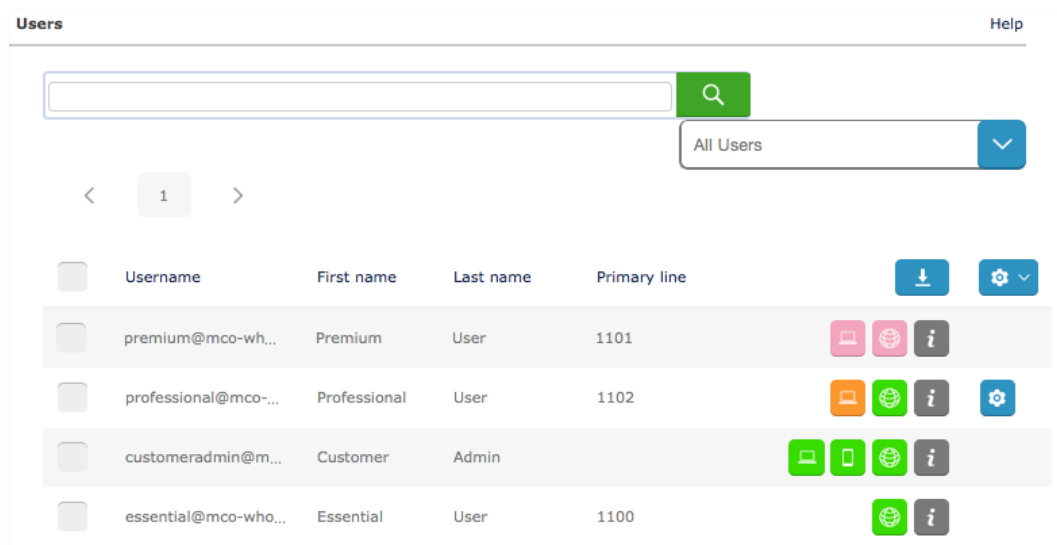
An activity is used to describe what the user is doing at the moment, for example "Lunch", to indicate that the user is out for lunch or "Meeting", to show that the user is currently in a meeting.

Users

Users are administrated from the Users section in the customer admin portal. The portal allows administrators to search, view and edit user settings. To create (or delete) a user you must contact your supplier. There are three types of users: Essential, Professional and Premium users. The Essential and Professional users are defined in the system as Business Lines users and Premium users are defined as UC users.


Your license model sets what type of features and services a user gets.

The Users page is a list view, showing the most important attributes of Users in the organization. You can view and edit a user by clicking on the user, or if you only want to view the most important settings, you can click on the Information icon to the right of a user.



The user list can be sorted and filtered in different ways and may span several pages. From the group selection drop-down box you can search for users belonging to a certain group and from the search field section you can enter any search string to display users whose primary attributes match your search criteria. You can use the following search strings:

- Userid - the username in the system
- Primary number - the user's primary number
- Secondary number - the user's secondary number
- Mobile number - the user's mobile number
- (other phone numbers) - any other phone numbers that have been configured for the user
- Name - the user's first or last name
- E-mail - the user's configured mail address

The tool icons display what applications a user has activated, downloaded or got an invitation to download. From the blue tool icon  you can send welcome message to download a mobile app or a desktop app. Note: Only users with the right licensing can use the applications.

By selecting several users and clicking the blue icon at the top, you can edit multiple users or send multiple welcome messages.

You can assign a user to a certain user group, such as a call distribution group. From the user list view you can select several users and assign them all to the same group.

Call barring

A set of call barring rules is defined in your system. For a user, or multiple users, you can enable one or several call barring rules. The following rules are defined in the system:

- Allow all international calls
- Allow directory services calls
- Allow freephone calls
- Allow mobile calls
- Allow national calls
- Allow premium calls
- Allow whitelisted international calls

IVR numbers

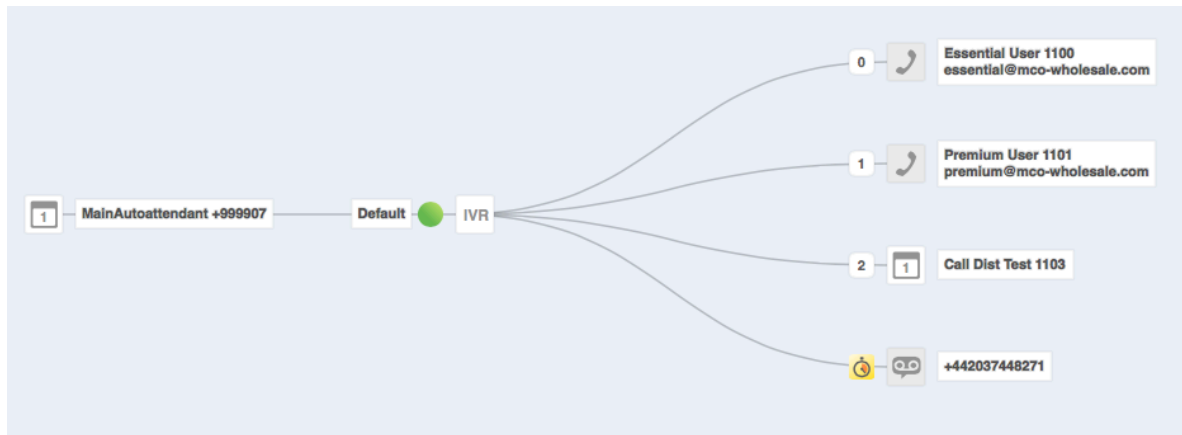
IVR is used to construct navigation menus that allow the calling party to use their phone to select how to connect to different destinations. An IVR service consists of associating IVR logic to a phone number. The IVR logic is based on voice prompts that are played when a call arrives to the phone number and one or more forward destination numbers that the DTMF key input is associated with. When the calling party presses a key on the phone after the voice prompt has been played, the call will be forwarded to the phone number associated with this key. Please consult your MiCloud Office OrgAdminGuide for more settings.

Number visualisation

Number visualisation presents a visual map of how telephone numbers for function numbers are configured. It shows a schematic view of the configuration describing scheduled opening and closed hours, forwarded number etc. Number visualisation is not a real time tool.

The following function number types can be visualised:

- ACD Premium/ACD group numbers
- Call Distribution/ACD light group numbers
- Attendant group numbers
- IVR numbers
- Rule based numbers



- Click on a function number in the list to expand the number visualisation view for that number.
- Clicking on a function number that is already expanded will collapse the number visualisation view.

Service settings

A number of service settings are created on an organisational level. Please check with your supplier for your default settings:

- Advanced settings
- Call pickup
- Call queues
- Call routing
- Call transfer
- Diversion bypass
- Exchange settings
- External API authorization
- Feature codes
- Intercom
- Number conversions
- Presence authorization
- Presence synchronization policies
- Switchboard number
- Voicemail settings