Adaptive
Collaboration

Management Portal User Guide

· Telstra Cloud Calling
· Microsoft Operator Connect with Telstra
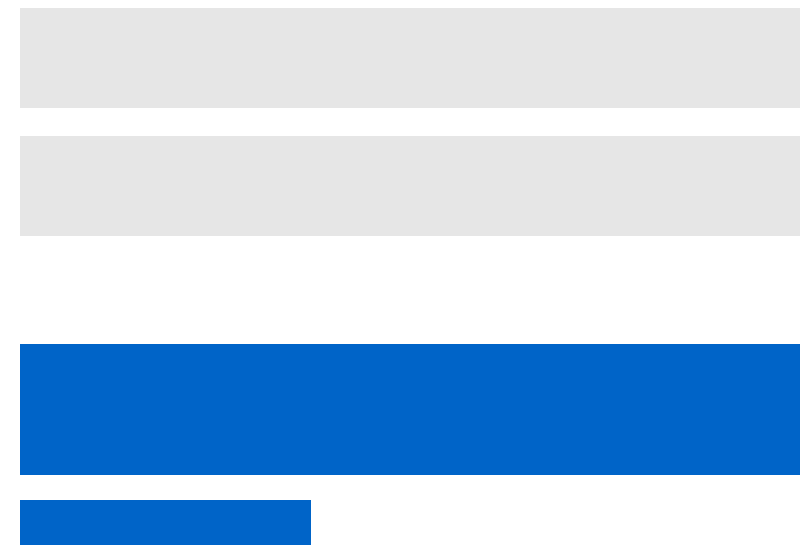
collaboration.telstra.com

Introduction

This Guide takes you through all the configuration steps within the Adaptive Collaboration Management Portal.

The Adaptive Collaboration Management portal is a self-service management portal for Microsoft Operator Connect and Telstra Cloud Calling.

You can manage new numbers and/or initiate tailored phone number cutovers from your legacy service at a time of your choosing, without relying on someone from outside your organisation. This allows you to integrate phone numbers directly in your Microsoft Teams tenancy or Telstra Cloud Calling solution. In addition, with Telstra Cloud Calling, you can configure and manage user and calling features. For Microsoft Operator Connect you configure and manage users and calling features in Microsoft Teams (please refer to the Microsoft online documentation).

Sign in and setup

Sign in to the
Telstra Collaboration portal

Login:

Visit collaboration.telstra.com and sign in using your login credentials. Provided in your 'Welcome to Telstra Collaboration' email.

Reset password:

- Select Reset password and follow the prompts.
- If your access fails, try clearing your browser's cache before trying again.

Know your Dashboard

Snapshot ⟳ Reload

MSOC Shared Line Service	Telstra Cloud Calling Individual Lines	Telstra Cloud Calling Shared Lines
Microsoft Operator Connect	Telstra Cloud Calling	Telstra Cloud Calling
Manage →	Manage →	Manage →

Business admins ⟳ Reload   Create admin

Admin	Admin	Admin	Admin
Manage →	Manage →	Manage →	Manage →

Select the **Telstra Cloud Calling** subscription services you want to manage.

Based on your business requirements you can have one or more subscriptions.

You can also add or remove administrators.

Dashboard   Departments   Settings

Snapshot ⟳ Reload

4 Admins
Add/ modify →

6 Users
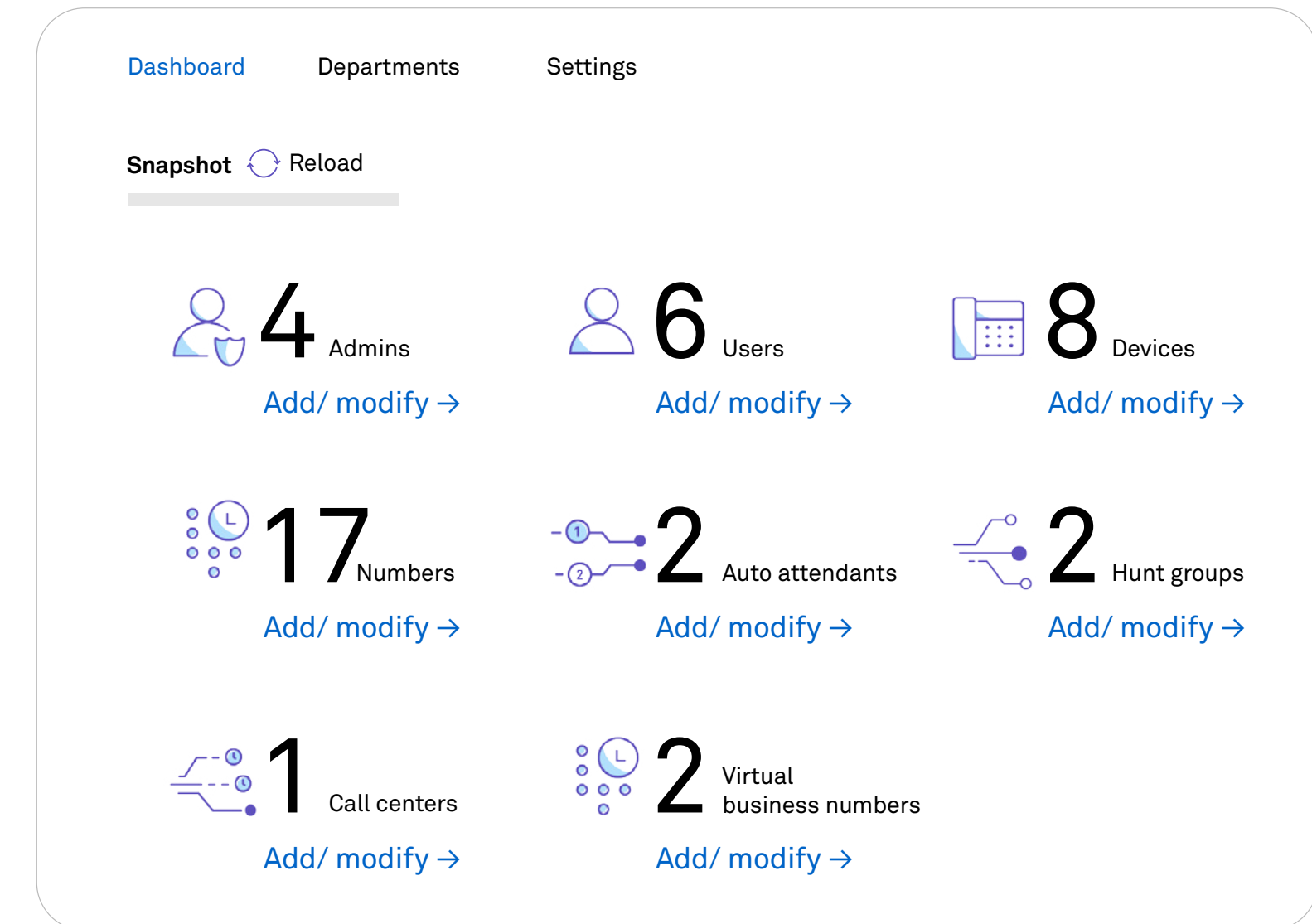Add/ modify →

8 Devices
Add/ modify →

17 Numbers
Add/ modify →

2 Auto attendants
Add/ modify →

2 Hunt groups
Add/ modify →

1 Call centers
Add/ modify →

2 Virtual business numbers
Add/ modify →

The dashboard provides quick access to easily manage and configure features like Users, Hunt groups and Auto attendants following a simple Wizard setup.

Additionally:

- **Departments** tab allows you to create logical groups for your business (e.g. Sales or Tech Support).
- **Settings** tab provides you access to group settings.

To go back to the main business dashboard click on the tenancy name at the top and select Business dashboard or select another subscription to manage.

User management

Create new user   User settings   Edit or remove users

| Department | User details | Number | Features | Device | Concurrency |
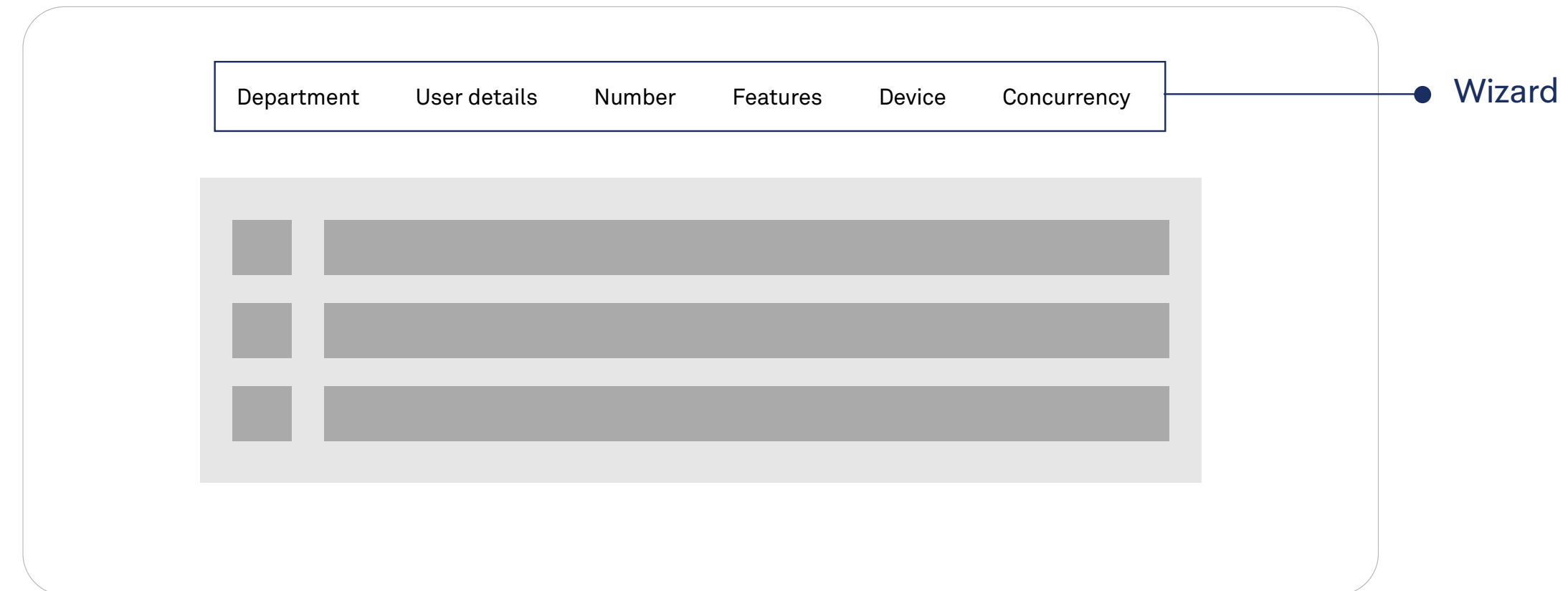
● Wizard

Creating new users

From the Dashboard select **Users**, then select **Create user**.

Follow the wizard and fill in the information requested to create a new user.

A device guide and network guide are available through the **support page.**

Overview of Wizard

Department (Optional)

Add or create a new Department for the user, allowing you to combine similar users into groups easily.

TIP: Optionally, you can provide Departments with an outbound Calling ID (name and/or number) that applies to all users within the group.

User details

Fill in the user details and add an email address when users select the Unified Communications add-on

TIP: Use a nickname to help identify the service, e.g. IAD or Fax

Numbers

Find a number using the Search option or look up using preferred digits

Add-ons

Basic Calling is available by default. The Unified Communications add-on (soft client) and Webex Collaboration features can be purchased via the portal.

New users will be sent a welcome email with the details needed to get setup

Device

Assign Telstra handsets or Analogue devices using the Search option or add new devices purchased elsewhere using Add manually option

Shared Lines

Only for customers who have a Shared Lines (Concurrent user) contract option. Add or remove shared lines following prompts

User management

Create new user   **User settings**   Edit or remove users

Dashboard   Departments   Resources   Settings

Edit Details

Extensions

Devices   Add-Ons   Incoming calls   Outgoing calls   Call Control   User Settings

Add-ons you might want

Unified Communications

Call Centre Agent Basic

Receptionist Client

Webex Basic
(Requires Unified
Communications add-on)

Webex Standard
(Requires Unified
Communications add-on)

Webex Premium
(Requires Unified
Communications add-on)
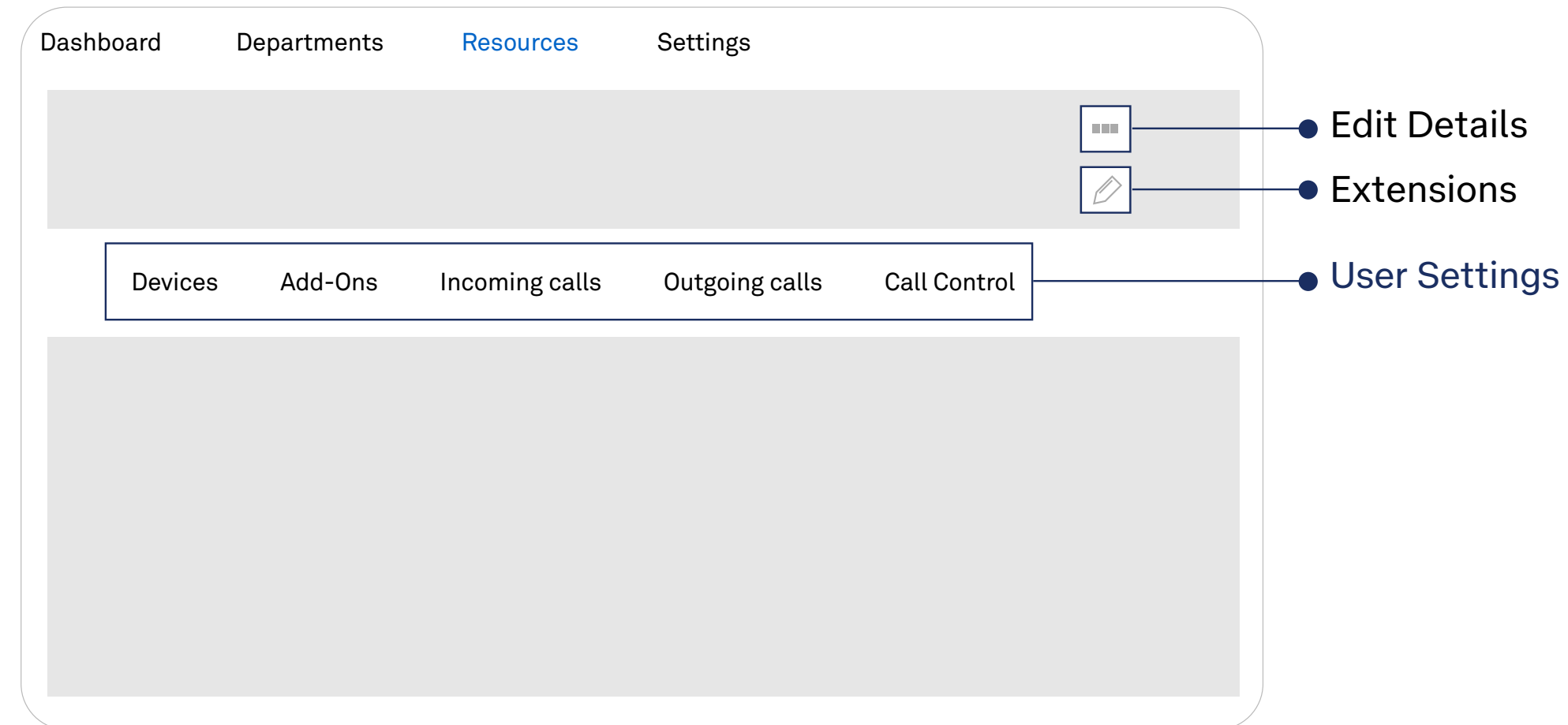
User settings

From the **Dashboard**, navigate to **Users** and select Add / modify. Select a user to open their profile.

- Edit the User details
- Modify number or extension
- Update call settings, caller ID and barring
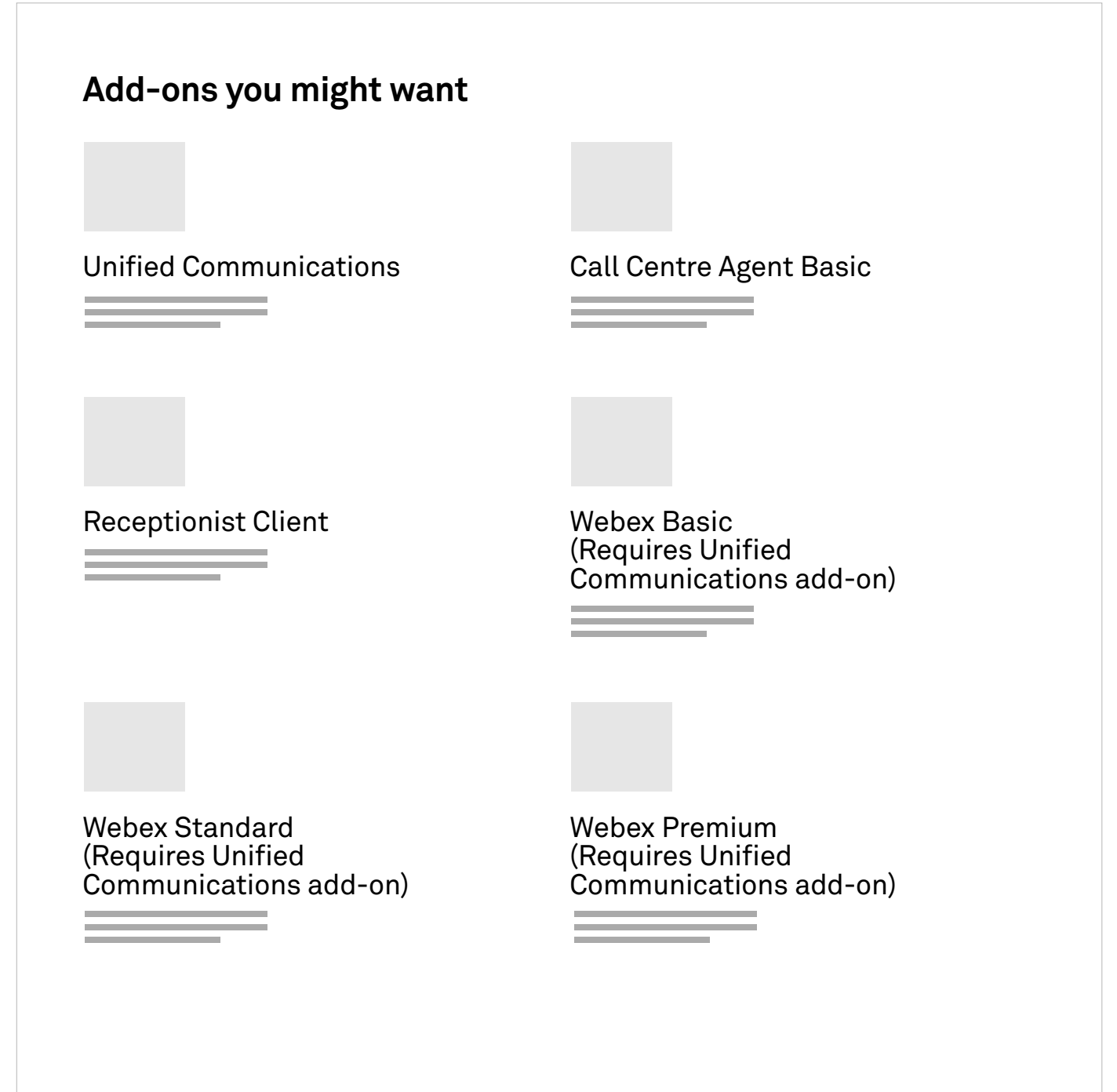
Settings

Devices

Add a new device or View the username and password for assigned devices by clicking on the arrow (**>**) next to device name

Add-ons

View, add or remove existing features.

- Unified Communications
- Call Centre Agent Basic
- Receptionist Client
- Webex Basic
- Webex Standard
- Webex Premium

Incoming calls

Define criteria for, amongst others:

- Call forwarding
- DND
- Call waiting
- Type and pattern of rings
- Voicemail

Outgoing calls

Define caller IDs and Call barring settings

Call control

Use additional numbers that act as your primary device.

Set your call transfer preferences.

User management

Create new user   User settings   **Edit or remove users**

Dashboard   Departments   Settings

### Users   Create user
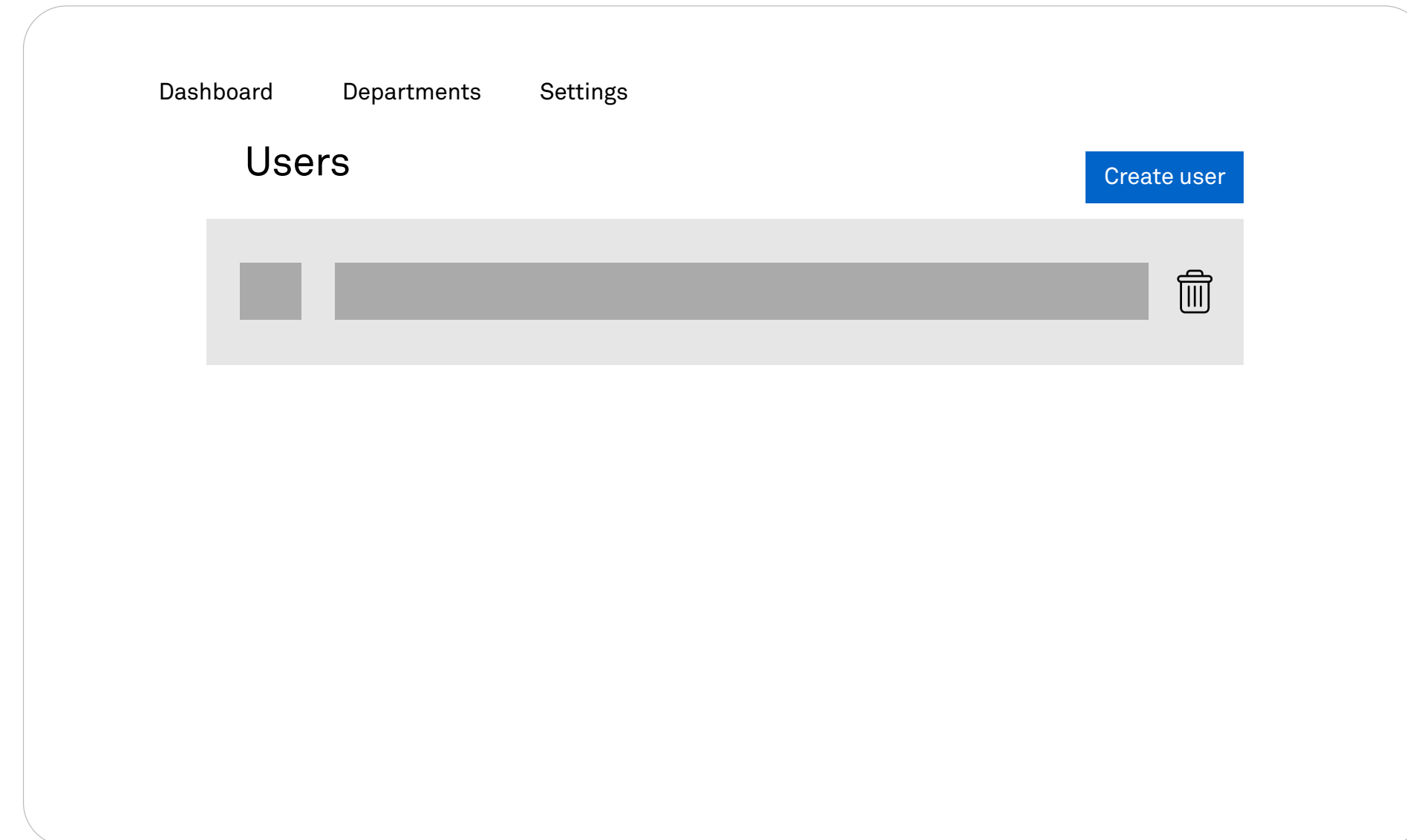
Edit Users

In the **Dashboard** select Users. **Click** on the user to edit the user.

Remove Users

To remove a user, select the user and click on the three dots ⋮. Click Remove and confirm.

Hunt group management

Create new Hunt Group

You can determine how you want to route incoming calls through your available users and agents by creating hunt groups. Adaptive Collaboration gives you the ability to tailor your hunt group features to your requirements. You can set business rules for call routing, add or remove members, set preferences within a group and more.

The steps to creating hunt groups are outlined in the following sections.

- Create a profile for the group
- Setting conditions and business rules for call distribution
- Adding members and assigning preferences

Wizard

| Introduction | Details | Number | Routing | Complete |

Setup a new hunt group

Start setup
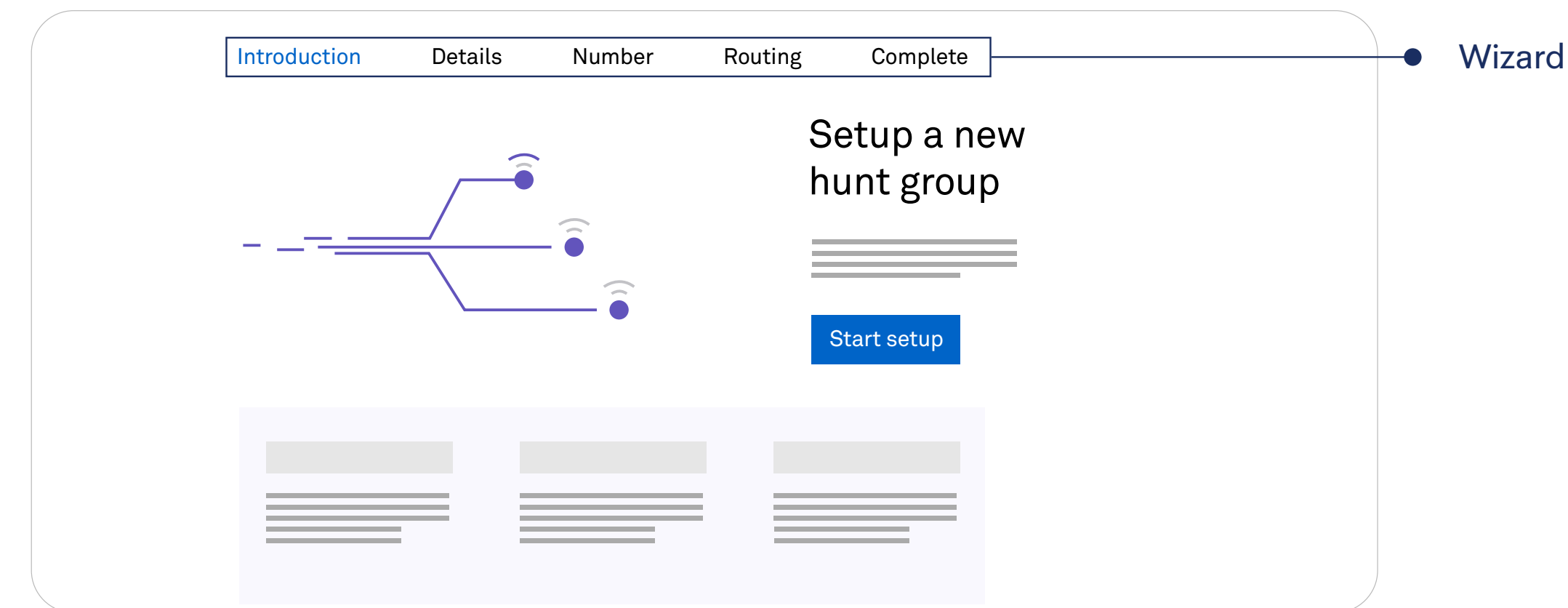
Creating new Hunt groups

In the **Dashboard** select **Hunt Groups**. Select **Create a hunt group** and follow the wizard to create a new Hunt Group.

Overview of Wizard

Details
Give your Hunt group a name and select a time zone. Optionally, add the Hunt group to a Department

Number
Assign a number.

Routing
Select how the routing of incoming calls should work: Linear, Circular, Simultaneous or Longest Idle.

Complete
Select **Go to this hunt group** to add members and settings

Hunt Group Management

To manage the Hunt Group go to Hunt groups in the Dashboard and select the hunt group. You can modify users and routing behaviour.

*More information on Distribution Types can be found by hovering over each type within the Wizard setup.
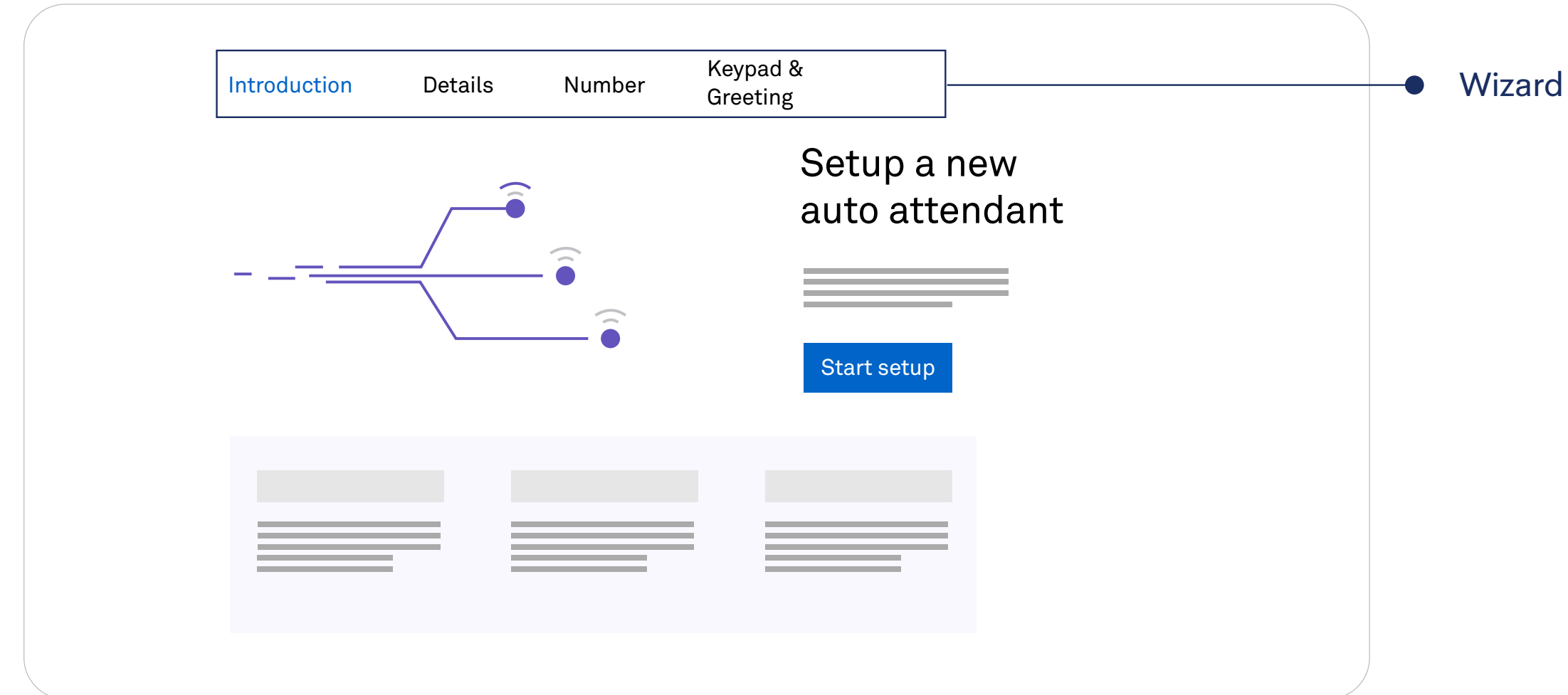
Auto Attendant management

Create new Auto attendant

You can set up Auto attendants to allow your callers to select from a menu system to get routed to a department or a person. The menu also allows you to play recorded greetings to your callers.

Creating an Auto attendant

Navigate to **Dashboard** and select **Auto Attendant**. Select **Create an Auto attendant** to create a new Auto attendant using the wizard.

The wizard allows you to easily configure the keypad options to transfer calls to users, hunt groups or an external number. Additionally you can assign an announcement message.

Overview of Wizard

Introduction	**Details** Add the name, optionally add the department and image	**Number** Select a number	**Keypad and Greeting** Add a greeting Select how you want your callers to be directed

Auto Attendant management

To manage the Auto Attendant go to Auto Attendants in the Dashboard and select the Auto Attendant. You can modify key assignments and greetings.
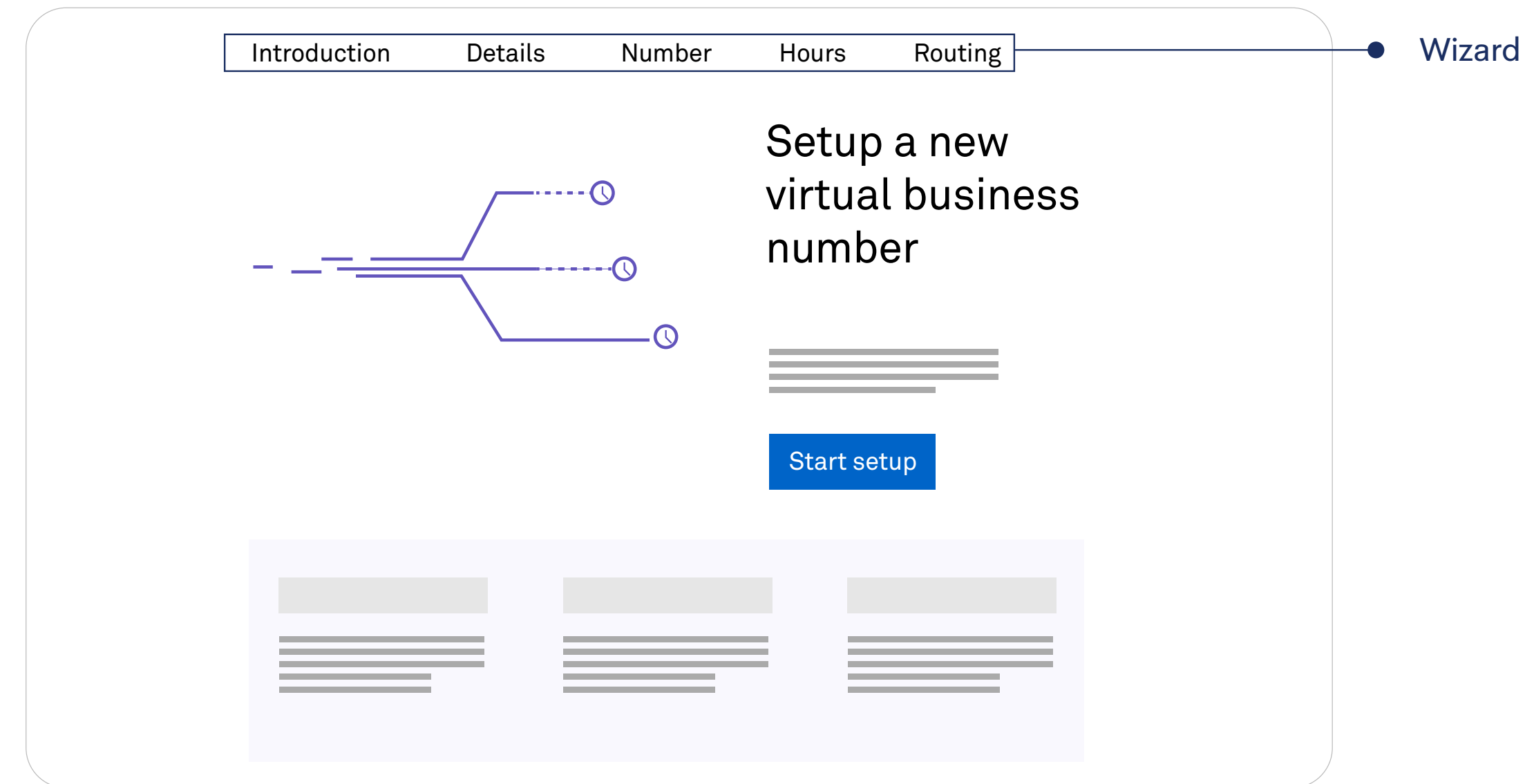
Virtual Business Number
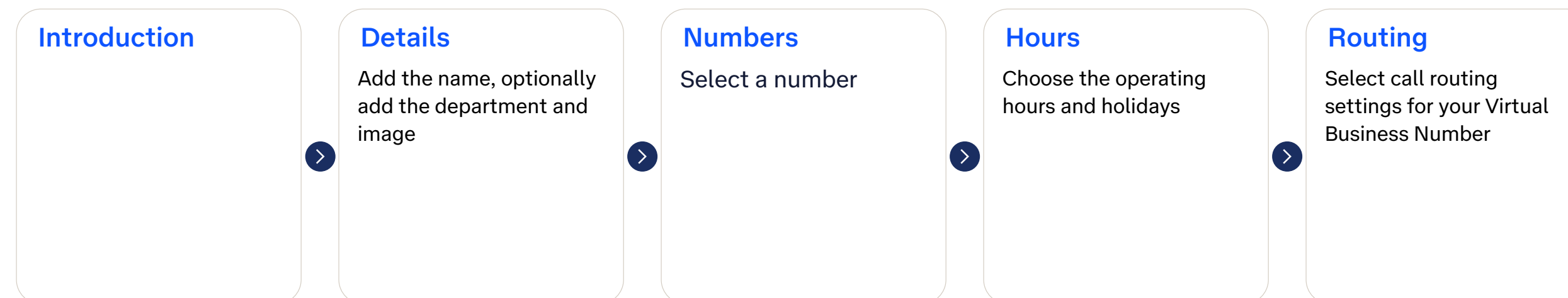
Creating Virtual Business Number

The Virtual Business Number is typically the number your business (or Department) will advertise, which gives you the option to set business hours and holiday periods, allowing for automated call flow changes during these times.

| Introduction | Details | Number | Hours | Routing | ━━━● Wizard |

Setup a new virtual business number

Start setup

Creating a Virtual Business Number

Navigate to **Dashboard** and select **Virtual Business Number**. Select **Create a VBN** to create a new Virtual Business number following the wizard.

Overview of Wizard

Introduction

Details
Add the name, optionally add the department and image

Numbers
Select a number

Hours
Choose the operating hours and holidays

Routing
Select call routing settings for your Virtual Business Number

Virtual Business Number management

To manage the Virtual Business Number go to Virtual Business Numbers in the Dashboard and select the Virtual Business Number. You can modify call routings and (holiday) operating hours.

Call Centre

**Create new Call Centre**   Manage Call Centre

Lets you dynamically handle incoming customer voice calls. Call Centre Basic queues your calls within the Adaptive Collaboration platform meaning you do not have to provide bandwidth into your site to cater for queued calls.

Provides basic queuing capabilities for distributing up to 25 active calls to your provisioned agents. Additional features include Music on Hold and agent log-on/off via their soft client.

The Webex App provides users with the Call Centre functionality.

Call Centre agents can have a physical handset configured separately to the Webex App, providing a Shared Call appearance. This allows agents to swap between soft client and handset with no configuration changes from the end-user.

From the **Dashboard**, select **Create a call centre** and follow the wizard to create and configure.
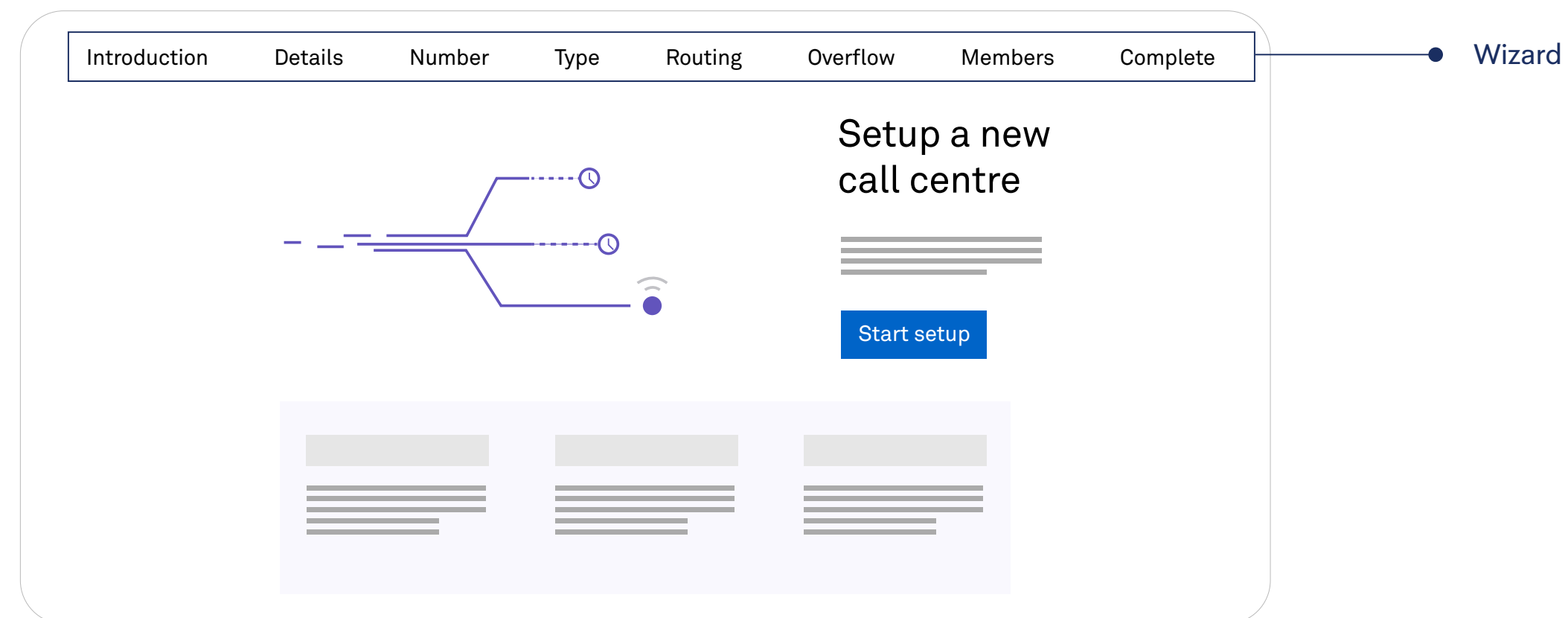
Wizard

Overview of Wizard

Details
Give your Call Centre a name and time zone.

Optionally, add to a Department

Number
Select the main number to be used for this call centre.

Type
Select which type of call centre you need.

Basic is currently only available

Routing
Select how the routing should work: Linear, Circular, Simultaneous or Longest Idle.

Overflow
Select how calls going into overflow are handled based on queue or waiting time.

Members
Add users to your call Centre. When you add a user, they will automatically be assigned the appropriate license.

Complete
Select **Go to this call centre** to add or modify users and configure the settings.
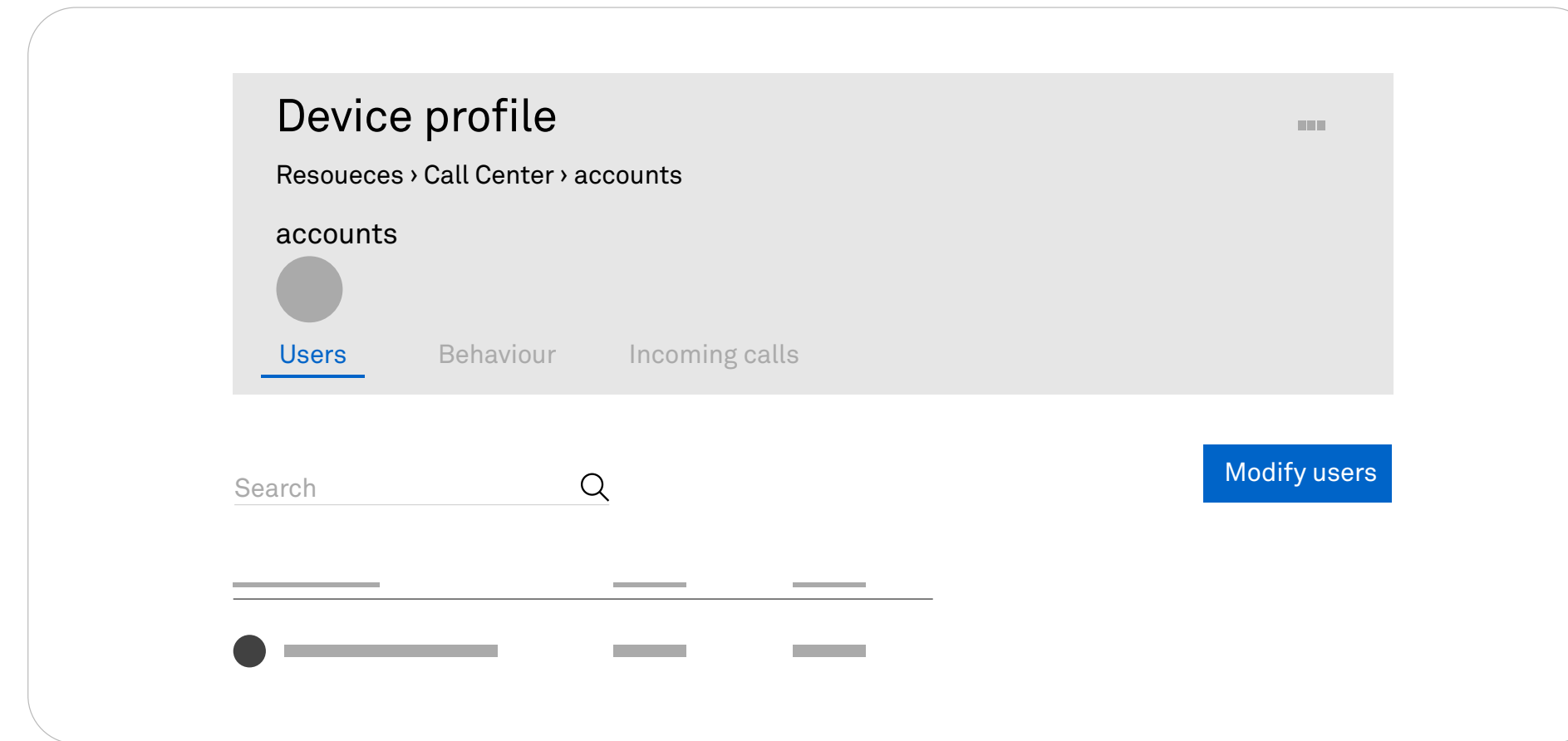
Call Centre

Create new Call Centre   <u>Manage Call Centre</u>

Within the **Dashboard** select the Call Centres to manage users, behaviour, and incoming call settings.

Users

- Add or remove users

Behaviour

- Change the routing, add or change greetings and music on hold.
- Configure settings that control how call centre users will receive calls (users can manage in the Webex App).
- Configure overflow actions when a call reaches the overflow.
- Configure the Call Centre voicemail inbox.

Incoming calls

- Activate or de-activate your Call Centre
- Configure call forward settings and call forward busy settings

Call Centre Basic client

The Webex App will provide the following functions for Call Centre agents:

- Join or leave the call centre queue.
- Ability to handle multiple calls, and assigned call waiting functionality
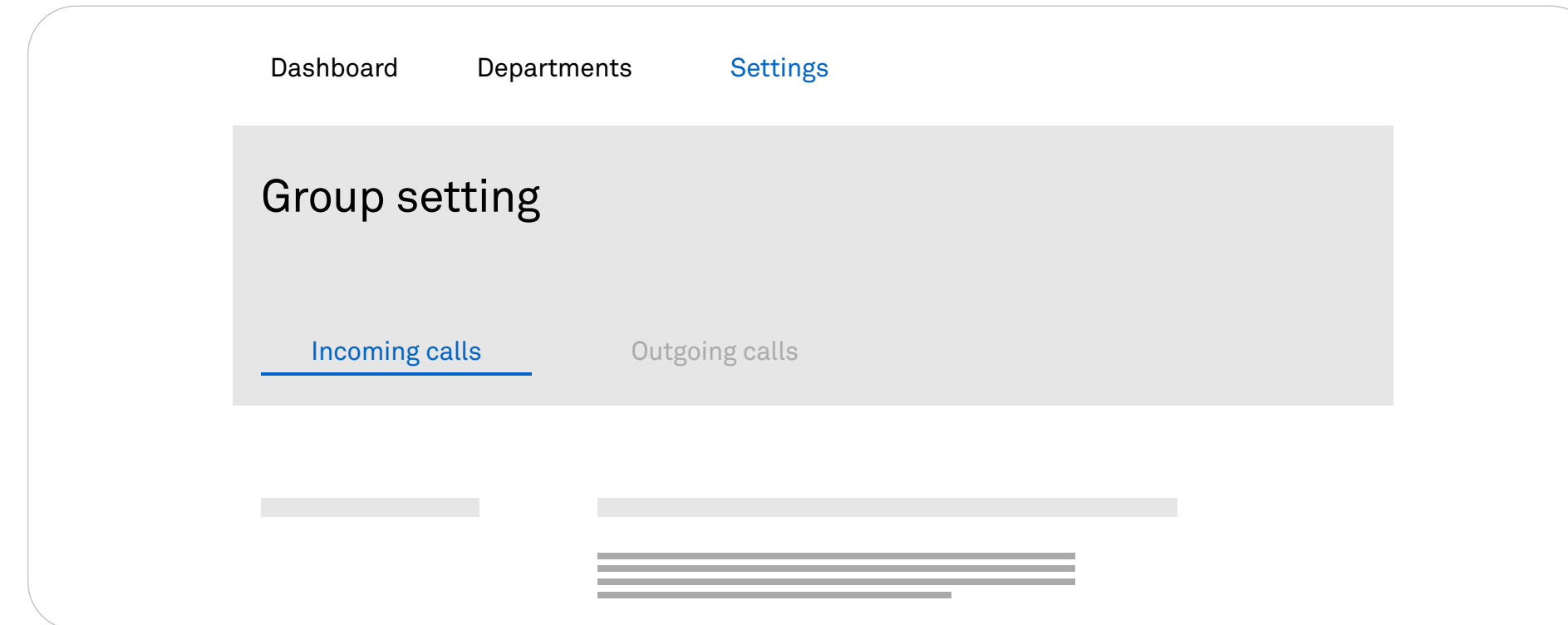
Group settings

Incoming calls/Outgoing calls

Control incoming call settings for music on hold and what call types are available globally across your users.

Group settings can be reached via **Settings** on the main dashboard.

Incoming calls

Call Park
Park a call against an extension so that any number of the group or enterprise can retrieve it.

Call Pickup
Answer incoming calls that are ringing on another user's line or extension

Music on Hold
Use the default system defined hold music or upload a custom audio file and adjust when hold music is used.

- Custom audio files can either be uploaded or recorded during this process (Max. 10 min)
- Settings to adjust:
  - When on hold
  - When a call is parked
  - If the calls remain unanswered, the call recalls to the transferring party.

Outgoing calls

Caller ID
This number (ID) shows when users call someone outside the business.

Call Barring
Configure the number types users can call

- Standard Australian calls
- Landline numbers
- Mobile numbers
- Toll free numbers
- Non-Standard Australian calls
- Customer enquiries
- International & Satellite calls
- International numbers
- Satellite numbers.

Optional: Under Advanced, a 4-digit code can be provided to a user to bypass global settings.
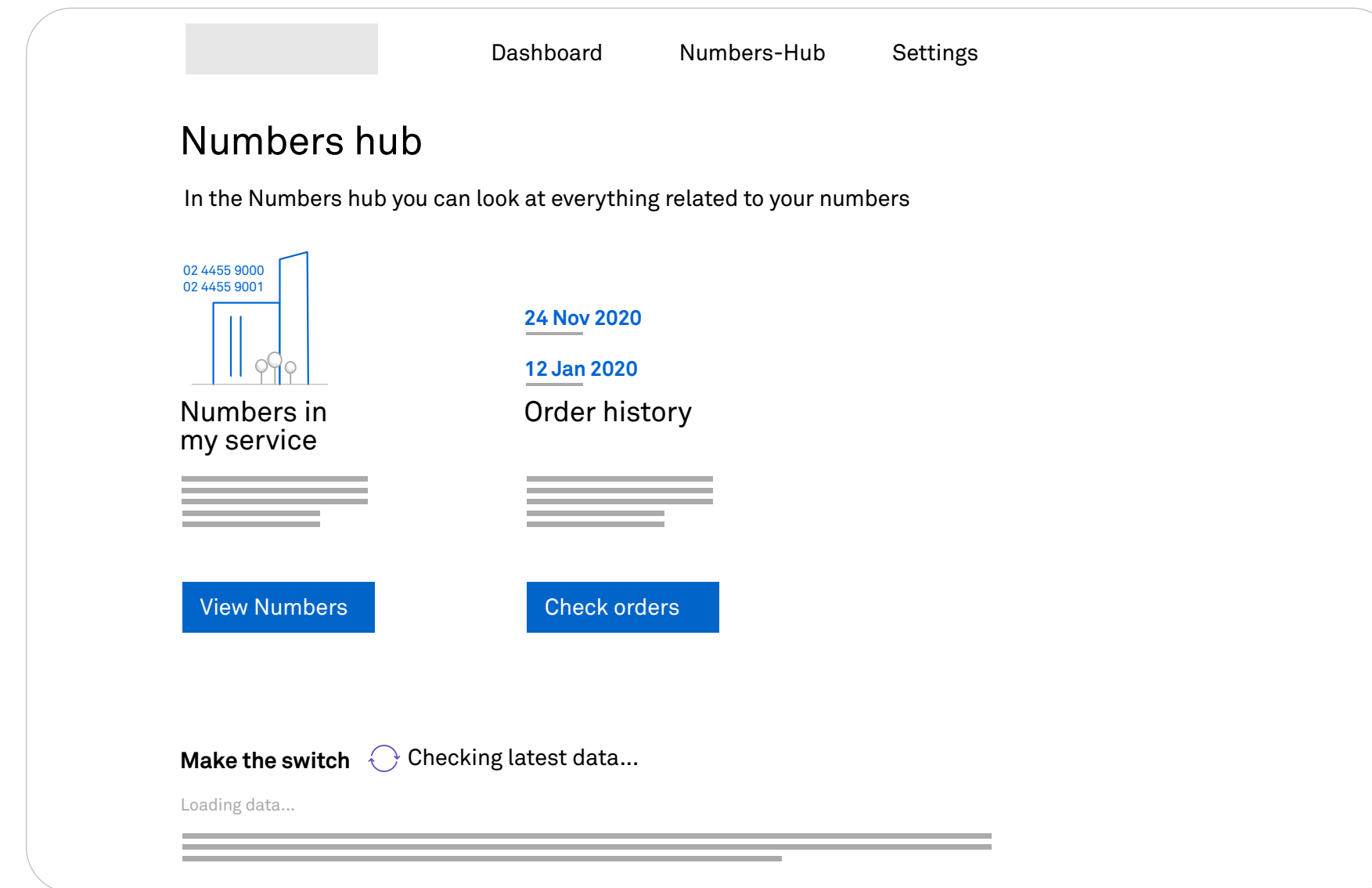
Number Management / Migration

You can manage phone numbers in your service in the **Numbers hub**. In the **Dashboard** select **Numbers** to go to the Numbers hub.

To see your existing services ready for migration to Telstra Cloud Calling select **Numbers** in the Dashboard.

Select the group name to **Start the switch then click on initiate** switch incoming calls.

Alternatively, by selecting the ⋮ icon behind the group name you can

• Start the switch over for all numbers

• Cancel the switch over

• Split the numbers in small cut-over groups (out of a 100 block)

To **Move** spare numbers to another subscription services select **View Numbers** then select **Move spare numbers** and follow the wizard.

Recommended workflow for switching to Telstra Cloud Calling

1. Complete migration order process with Telstra.

2. Confirm that the phone numbers are visible in the Adaptive Collaboration Management Portal in the Numbers-Hub of the chosen subscription.

3. Assign the phone numbers to users in the Adaptive Collaboration Portal by creating a user in the Dashboard

4. Make outgoing test calls

5. When confirmed, in the Adaptive Collaboration Portal, select the legacy service to Switchover in the Numbers-Hub.

6. When switchover is complete and the phone numbers are Active, perform incoming call tests. Confirm incoming calls to the phone numbers are landing in user's Webex client or device

7. If something is not correct you can revert back to legacy services.

8. 7 days after switch over the legacy services will be automatically disconnected.

Note: In the Adaptive Collaboration Portal, an ISDN Number switch-over group cannot be split into smaller groups. First assign the numbers to users, then switch over the complete group.

Port-in Telstra Cloud Calling

Go to the **Dashboard** and select the Number tile. Scroll down to the Port-In section

Numbers in
my service

Order history

View Numbers

Check orders

Make the switch ⟳ Reload data...

Current as of today...

Unknown address

Name ↑↓	Numbers ↑↓	Type	Status	
Service Desk ›	10	TIPT-SIPC	● Ready to switch	⋮

Port-ins (Only showing in-flight batches, see Orders History for completed batches)

Name ↑↓	Batch ID ↑↓	Port-in activation date ↑↓	Numbers ↑↓	Status
MSOC SINGLE PRODUCT JR BVT	34002	DD/MM/YYYY 16:00	202	● Port-in Ready

Recommended workflow for Port-in from another Service Provider to Telstra Cloud Calling

1. Complete the Customer Authority Form to switch to Telstra and arrange a port-in appointment.

2. When the port-in appointment is confirmed, the phone numbers to be ported-in will be loaded into your nominated Telstra Cloud Calling service of the Adaptive Collaboration Management Portal.

3. Go to the Numbers tile on the dashboard and scroll down to the Port-In section to view your phone numbers (status: Port-in Ready).

4. Before the port-in appointment, complete the readiness preparation by assigning the phone numbers to users and group features. However, users will not be able to make and receive calls until the port-in is activated.

5. A Telstra representative will contact you prior to the appointment time to confirm your readiness. Then, at the port-in appointment time, the port-in cutover will auto begin (status: Porting In).

6. When the phone numbers are successfully cutover, a Telstra representative will contact you again and you can begin making and receiving test calls (status: Port-in Activated).

7. Once you have confirmed that the test calls are successful and the solution is working, the port-in status will change to: Port-in Completed.

Note: If at any stage during the port-in process where the port-in appointment needs to be rescheduled (e.g. readiness or issue during cutover), the new appointment will need to be at minimum 10 business day from the day it is being arranged.

Webex App

After you provision the Unified Communications add-on pack to your user, the user receives a 'Welcome to Telstra Adaptive Collaboration' email with a link to download the Webex app. The Webex app provides the softphone function.

Link to download the Webex app: webex.com/downloads.html

Once the Webex app is downloaded, the user can login with their Telstra ID credentials. If the user does not have a Telstra ID, the user will receive a separate email to set their password.

The softphone is now ready to use, and the user can make and receive calls.

Note: In the settings additional Webex collaboration features can be configured for users.

Introduction

Microsoft Operator Connect with Telstra comes with the Adaptive Collaboration management portal to manage your phone numbers. Before you transition your phone numbers to Microsoft Teams validate in the Microsoft Teams admin centre under the section **Operator Connect** that you have selected **Telstra Australia** as your operator and that the status is active (Refer to Microsoft documentation online).

Connect to Microsoft 365 tenant

The first time you open the dashboard you are requested to make a connection to your Microsoft 365 tenant with an easy to use wizard. You make a connection in each service subscription in your tenant.

In step 1 provide

- Your Tenant ID
- Enter email address configured for Telstra as the 'My Operator' in the Teams Admin Centre

In step 2 select what to do with your numbers

- If you want to upload all numbers directly in the Microsoft Teams tenancy as users automatically or,
- Make a choice to configure and upload the numbers as users or voice apps.

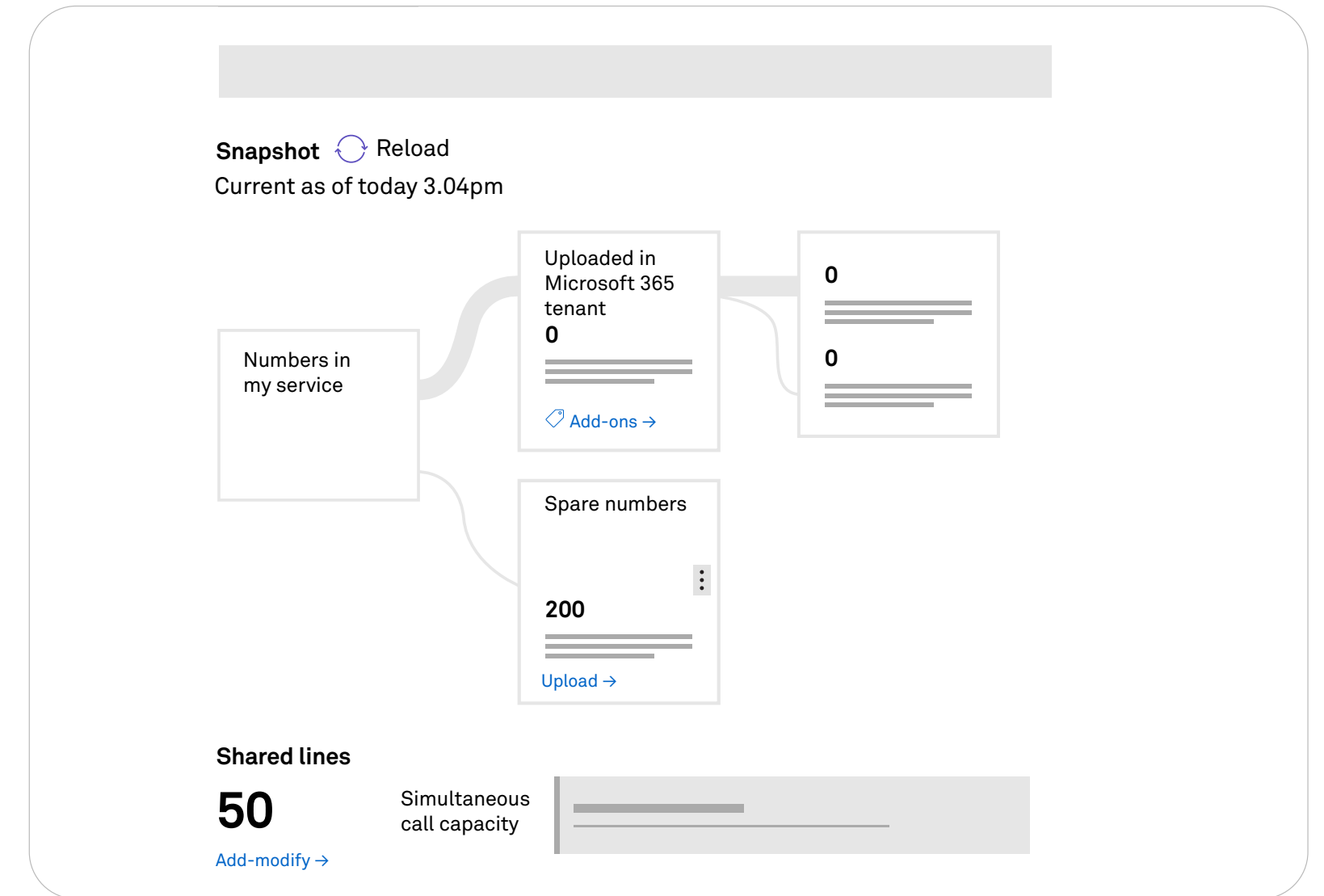Then Submit your selection. You will see a snapshot with your numbers.

Dashboard

Select the **Microsoft Operator Connect** subscription services you want to manage.

Based on your business requirement you can have one or more subscription.

You can also add or remove administrators.

The Dashboard provides an overview of the numbers in your service. You see the numbers that have been switched to Microsoft Teams and Spare numbers.

- To **Upload** your numbers to either a user or a voice service, select the **Upload** function in the Spare numbers tile and follow the wizard.

- To **Move** spare numbers to another service subscription, select ⋮ in the Spare Numbers tile and follow the wizard.

- To manage **Shared Lines**, call capacity click on add / modify.

- To add the Business Continuity add-on click on '**Add-ons**' in the Uploaded tile and follow the wizard.

Note: to change an existing user number to a voice service follow the below steps

1. Release the number in Microsoft Teams

2. Wait 15 Minutes

3. Press the Reload button in the Snapshot Dashboard.

4. The number will show up in the Spare Number tile in the Adaptive Collaboration Portal. You can now upload the number as a voice service.

# Microsoft Operator Connect Business Continuity add-on

The Microsoft Operator Connect Business Continuity add-on provides the option for an alternate business calling destination phone number in the case of an outage that causes incoming calls to fail. You can also manually invoke alternative routing in case of a business continuity issue.

In the dashboard click on Add-ons and configure your Business Continuity following the wizard.

Business Continuity Call Forward not Reachable

Cloud-based solution for automatic re-routing of calls in the event of an outage:

- Microsoft Cloud or Microsoft Teams issue results in failure to accept calls from Telstra
- There is a failure of the interconnect between Telstra and Microsoft cloud
- Business incoming calls redirected to non-Teams number (e.g. Mobile)
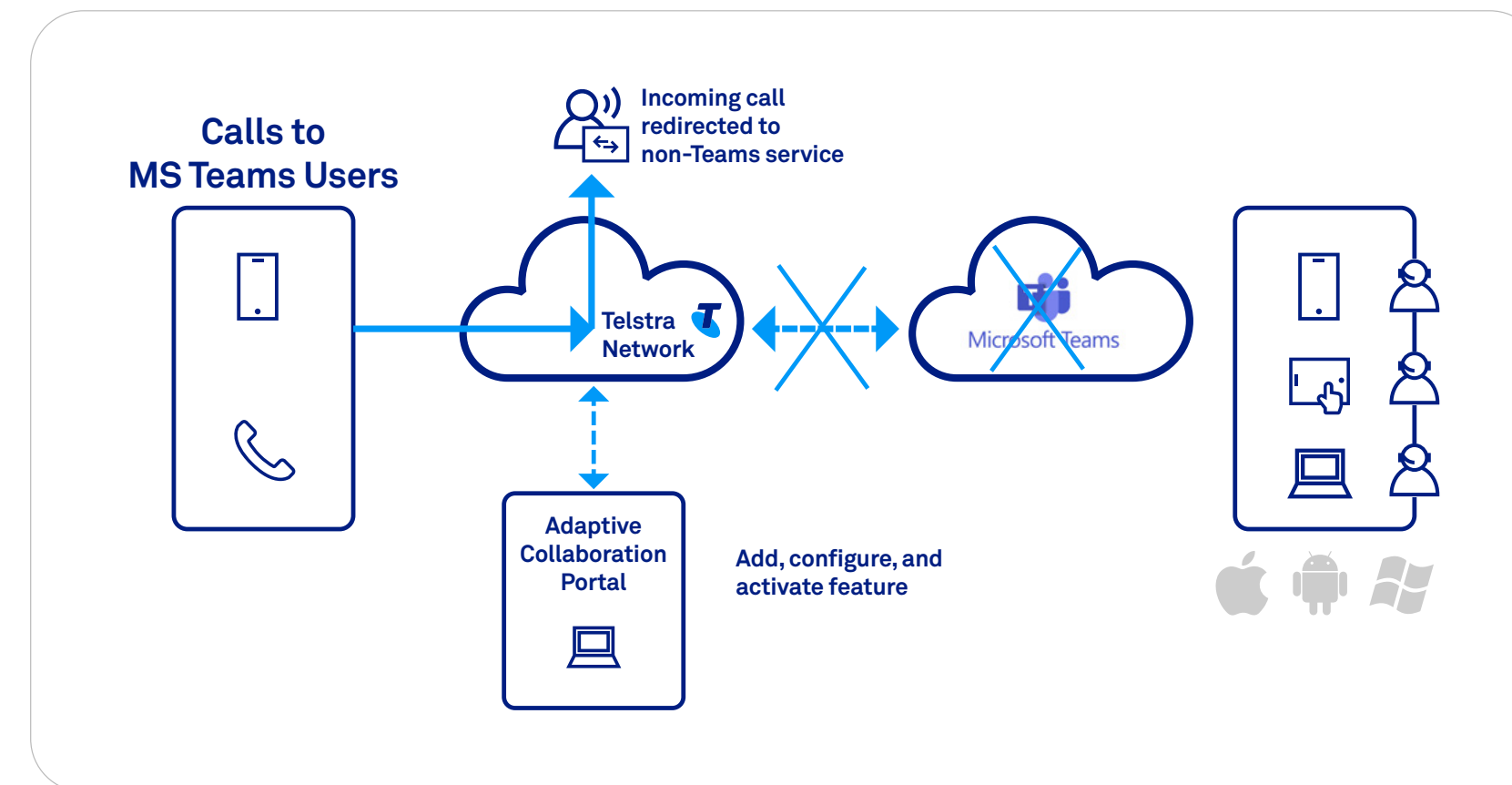
Business Continuity Call Forward Always

Manually invoke alternative routing in case of customer business continuity issue

- Quickly and efficiently re-route calls to another site — eg in case of site evacuation
- Route to another Teams site, or non teams
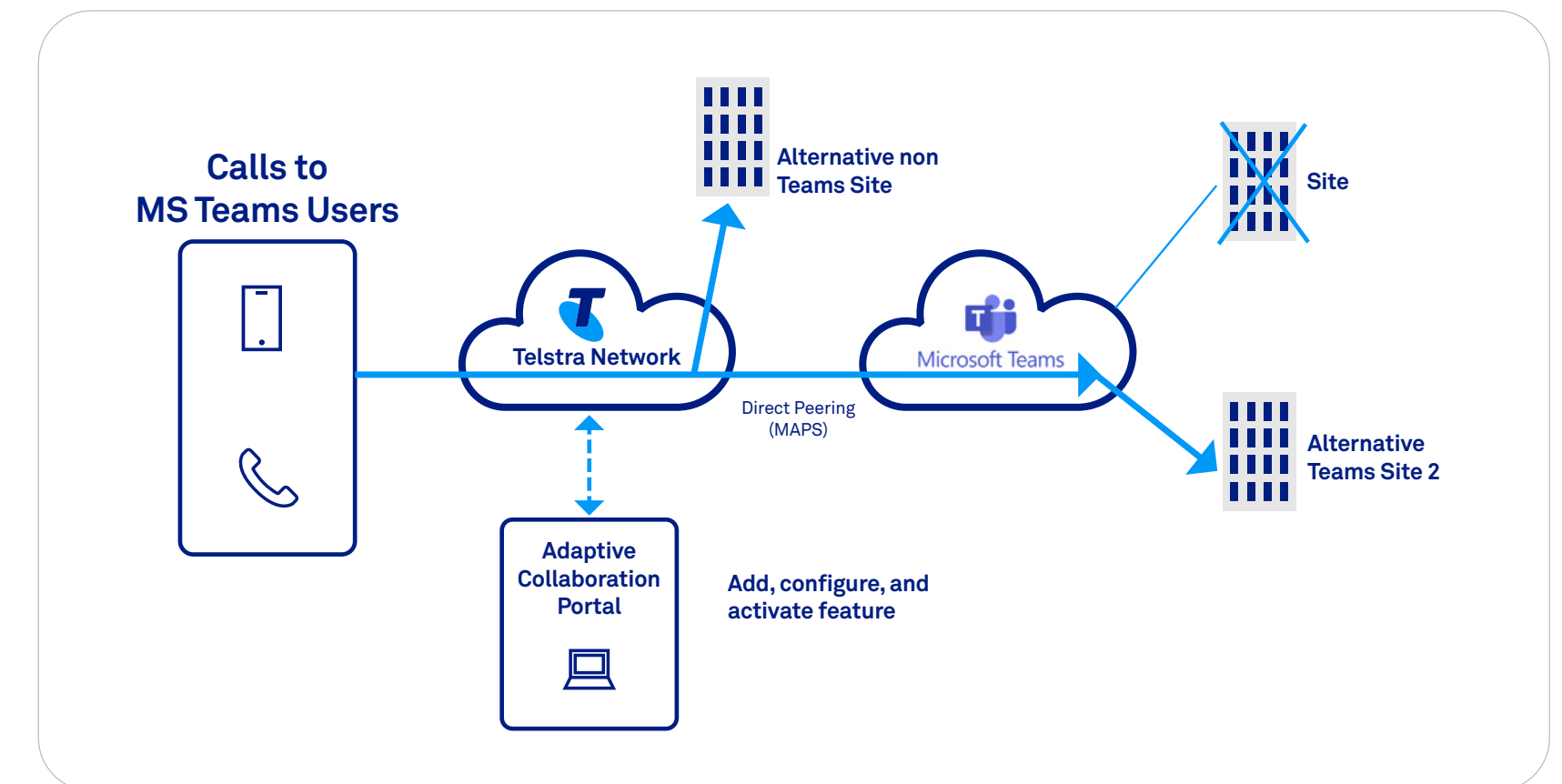
Number Management / Migration

Select the **Numbers Hub** at the top of the page. Scroll down to the numbers that are being switched.
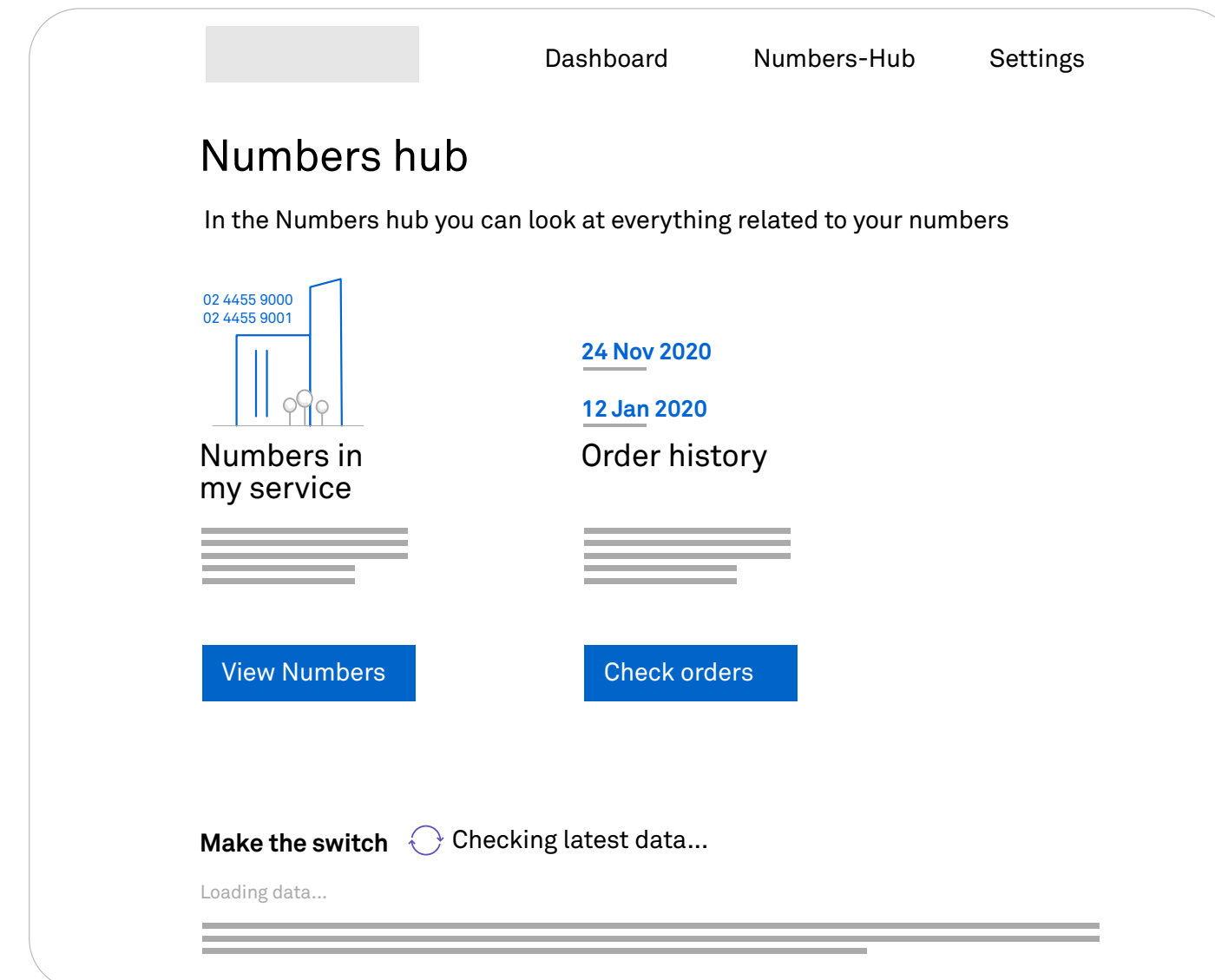
| | Dashboard | Numbers-Hub | Settings |

Numbers hub

In the Numbers hub you can look at everything related to your numbers

02 4455 9000
02 4455 9001

24 Nov 2020

12 Jan 2020

Numbers in
my service

Order history

View Numbers

Check orders

Make the switch ⟳ Checking latest data...

Loading data...

Select the group name to **Start the switch then click on initiate switch incoming calls**

Alternatively, by selecting the ⋮ icon behind the group name you can

- Start the switch over for all numbers
- Cancel the switch over
- Split the numbers into small cut-over groups

Recommended workflow for switching to Microsoft Operator Connect with Telstra

1. Select Telstra as your operator in the Microsoft Teams Admin Centre under Operator Connect.
2. Complete migration order process with Telstra.
3. Confirm that the phone numbers are visible in the Adaptive Collaboration Management Portal in the Numbers-Hub of the chosen subscription.
4. Upload the required phone numbers to Microsoft tenant from the Dashboard.
5. Assign the phone numbers to users or voice services in Teams Admin Centre.
6. Make outgoing test calls.
7. When confirmed, in the Adaptive Collaboration Portal, select the legacy service to Switchover in the Numbers-Hub.
8. When switchover is complete and the phone numbers are Active, perform incoming call tests. Confirm incoming calls to the phone numbers are landing in users' Teams client.
9. If something is not correct you can revert back to legacy services.
10. 7 days after switch over the legacy services will be automatically disconnected.

Note 1: An ISDN Number switch-over group cannot be split into smaller groups. First upload the numbers to MIcrosoft Teams and assign the numbers to users, then switch over the complete group.

Note 2: If phone numbers are already in the Microsoft Tenant and being used with another Microsoft Teams PSTN connectivity option (e.g. Direct Routing), then you will not be able to upload the phone numbers to your Microsoft Tenant until you have released the phone numbers in the Teams admin centre.

We suggest that you have the Powershell script* ready and only release the phone numbers near or at the switch over time to minimise user impact. Once the phone numbers are released, you will be able to upload the phone numbers to your Microsoft Tenant and assign them to users and voice apps in the Teams admin centre.

* Refer to this Microsoft knowledge article to move phone numbers from Direct Routing to Microsoft Operator Connect
https://learn.microsoft.com/en-us/microsoftteams/operator-connect-configure#move-numbers-from-directrouting-to-operator-connect

Port-in Microsoft Operator Connect with Telstra

Go to the **Numbers Hub** and scroll down to the Port-In Section.

Numbers in my service

Order history

View Numbers

Check orders

Make the switch ⟳ Reload data...

Current as of today...

Unknown address

Name ↑↓	Numbers ↑↓	Type	Status	
Service Desk ›	10	TIPT-SIPC	● Ready to switch	⋮

Port-ins (Only showing in-flight batches, see Orders History for completed batches)

Name ↑↓	Batch ID ↑↓	Port-in activation date ↑↓	Numbers ↑↓	Status
MSOC SINGLE PRODUCT JR BVT	34002	DD/MM/YYYY 16:00	202	● Port-in Ready

Recommended workflow for Port-in from another Service Provider to Microsoft Operator Connect with Telstra

1. Complete the Customer Authority Form to switch to Telstra and arrange a port-in appointment.

2. When the port-in appointment is confirmed, the phone numbers to be ported-in will be loaded into your nominated Microsoft Operator Connect with Telstra service subscription in the Adaptive Collaboration Management portal.

3. Go to the Numbers Hub page and scroll down to the Port-In section to view your phone numbers (status: Port-in Ready).

4. Before the port-in appointment, complete the following readiness preparation:

   a) If the phone numbers are not in your Microsoft Tenant: Upload your phone numbers to your Microsoft Tenant and assign them to users and voice apps in the Teams admin centre. Note that the users and voice apps will not be able to make and receive PSTN calls until the port-in is activated.

   b) If phone numbers are already in Microsoft Tenant and being used with another Microsoft Teams PSTN connectivity option (e.g. Direct Routing), then you will not be able to upload the phone numbers to you Microsoft Tenant until you have released the phone numbers in Teams admin centre. We suggest that you have the Powershell and only release the phone numbers near or at the port-in appointment time to minimise user impact. Once the phone numbers are released, you will be able to upload the phone numbers to your Microsoft Tenant and assign them to users and voice apps in the Teams admin centre.

5. Telstra representative will contact you prior to the appointment time to confirm your readiness. Then, at the port-in appointment time, the port-in cutover will auto begin (status: Porting In).

6. When the phone numbers are successfully cutover, a Telstra representative will contact you again and you can begin making and receiving test calls (status: Port-in Activated).

7. Once you have confirmed that the test calls are successful and the solution is working, the port-in status will change to: Port-in Completed.

Note: If at any stage during the port-in process where the port-in appointment needs to be rescheduled (e.g. readiness or issue during cutover), the new appointment will need to be at minimum 10 business day from the day it is being arranged.

* Refer to this Microsoft knowledge article to move phone numbers from Direct Routing to Microsoft Operator Connect
https://learn.microsoft.com/en-us/microsoftteams/operator-connect-configure#move-numbers-from-direct-routing-to-operator-connect

Help and Support

For any questions about your offer, technical support, service, or connection, you can visit **Telstra Connect** or call us on **1800 370 430**. Assurance and fault calls are answered 24 hours / 7 days, all other calls are answered Monday to Friday, 9am to 5pm Eastern Standard Time (except national public holidays).

Telstra Connect allow you to

- View your bills
- View your services
- Track orders
- Submit and track support enquiries

Telstra Cloud Calling Support for Network Integration and setting up your devices:
https://www.telstra.com.au/business-enterprise/support/adaptive-collaboration