Colt Cloud UC

SMP Administrator Training

User Guide

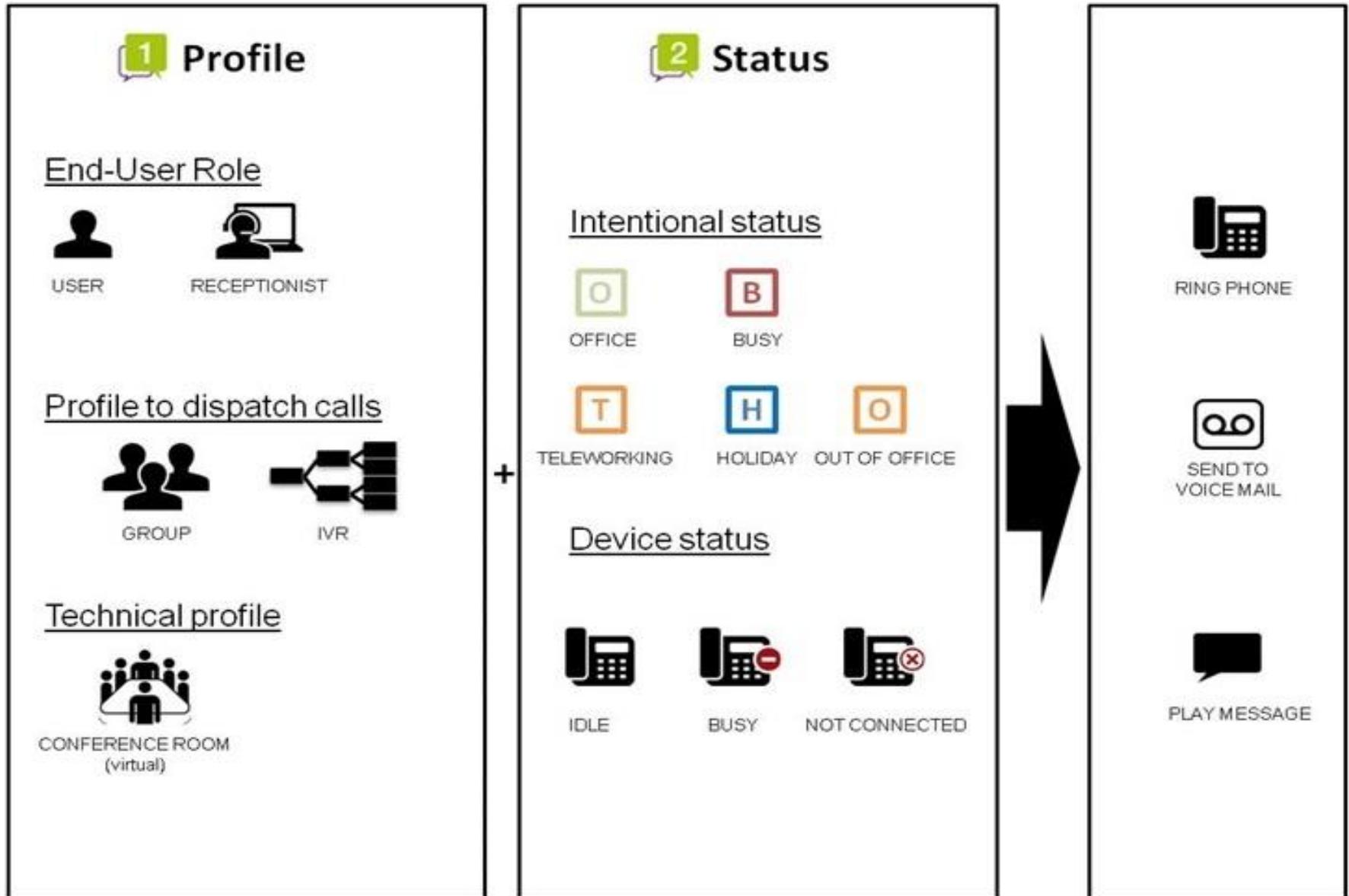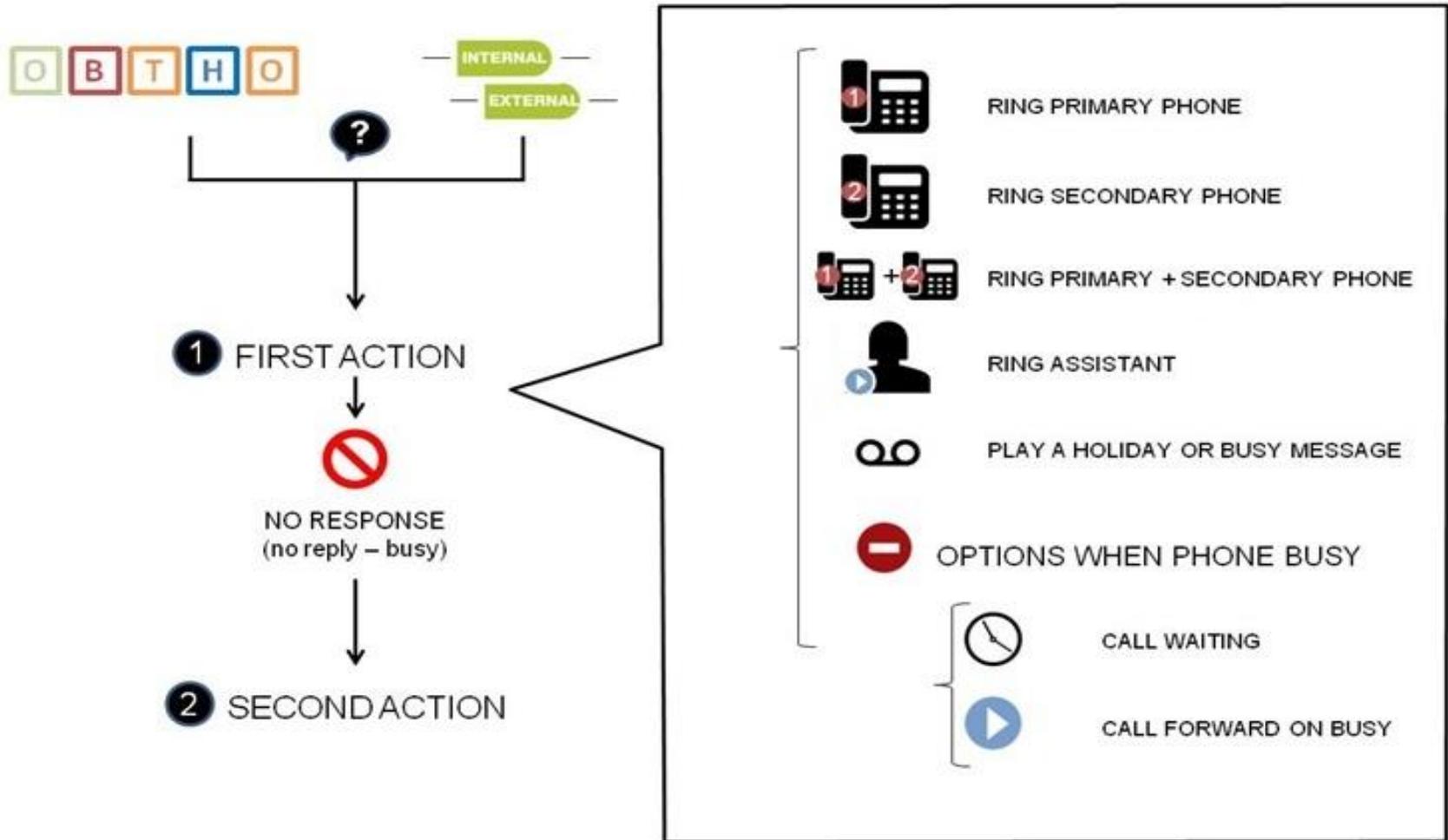**colt**

- **General Introduction**
- **User's options**
- **How to configure a user**
- **How to configure service availability**
- **How to create an IVR**
- **How to create a conference room**
- **How to manage a Group**
- **Call Queuer**
    - **How to manage the voicemail of the Group**
    - **How to configure Cloud UC End User portal**
- **Other profiles**

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1 Profile

End-User Role

USER   RECEPTIONIST

Profile to dispatch calls

GROUP   IVR

Technical profile

CONFERENCE ROOM
(virtual)

+

2 Status

Intentional status

O   B
OFFICE   BUSY

T   H   O
TELEWORKING   HOLIDAY   OUT OF OFFICE

Device status

IDLE   BUSY   NOT CONNECTED

RING PHONE

SEND TO
VOICE MAIL

PLAY MESSAGE

How to manage a User

Note : a user subscribes automatically to a queue when he changes his status

How to manage a User

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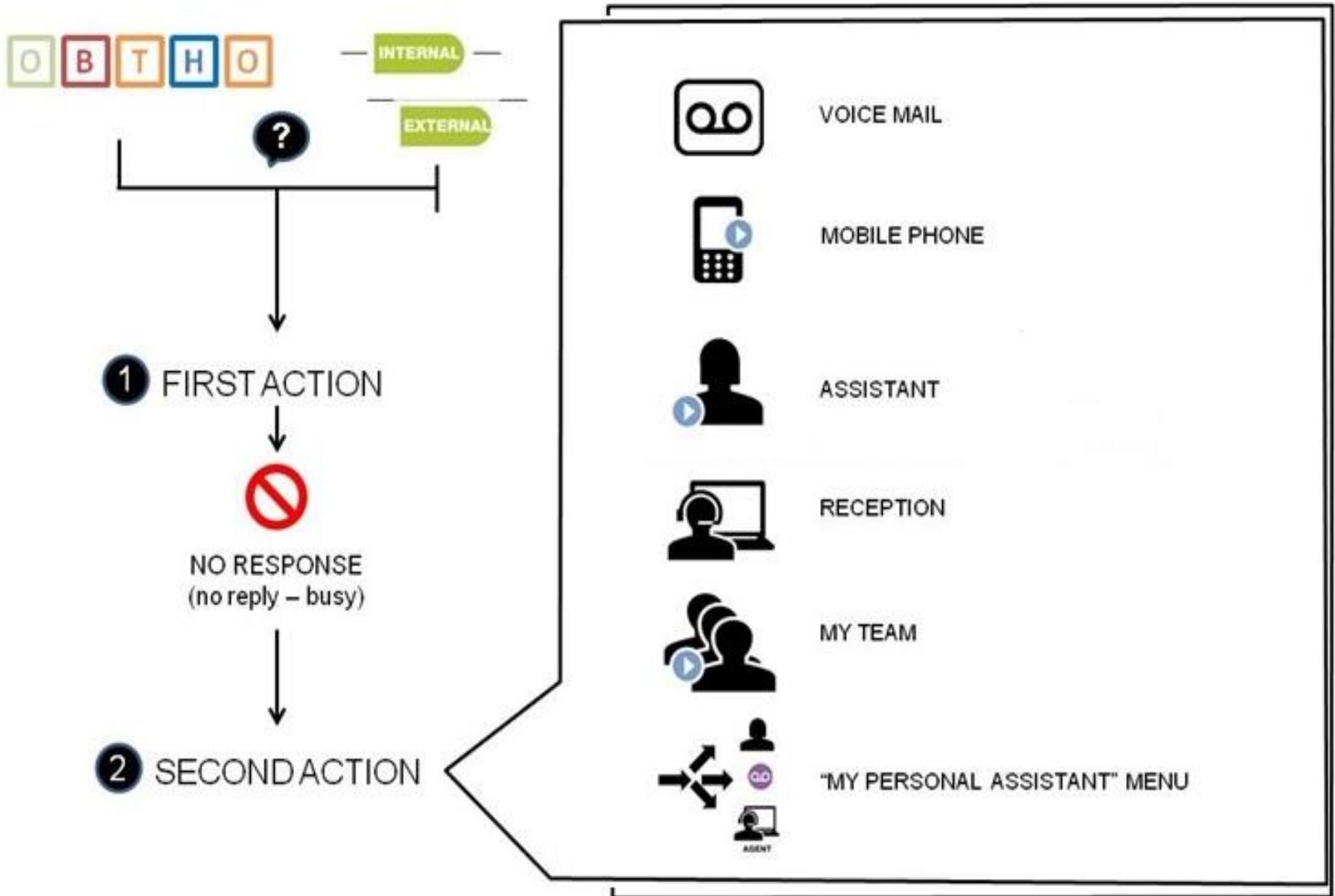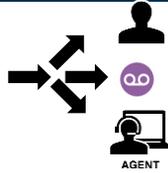
"My Personal Assistant" menu = IVR

- Decide which options will be presented to calling party
  - Send to voicemail
  - Send to mobile
  - Talk to assistant
  - Talk to reception
  - Forward to cell phone
  - Forward to your alternative number (e.g. home, hotel, …)
  - Call-back (internal numbers only)
    - Only for internal calls
    - Limited number of tries

How to manage a User

There are different user roles: green, blue, purple & red
- how to configure a user
- Depending on the color, the end-user has more or less autonomy to configure his parameters.
- See below the main differences

	Status Change	Forward settings	First action	Second action	Personal Menu options	Important numbers	Security options	My groups
Green	✔	✔	✔	✔	✔	✔	✖	✖
Blue	✔	✔	✔	✔	✔	✖	✖	✖
Purple	✔	✔	⊙	✖	✖	✖	✖	✖
Red	✔	✔	⊙	✖	✖	✖	✖	✖

⊙ - remaks:

- Profile purple
  - The manager cannot configure the parameter "When my assistant calls"
- Profile Red
  - The user & the manager can configure the parameter "When I'm on the phone"

How to CREATE a USER

Steps
- Step 1 : Create a user for
- authentication
- user's language
- user's role
- Step 2 : create an user's extension
- to reach the user internally
- to define the department for pick up
- to attach a phone
- Step 3 :create a DDI (optional)
- to reach the user externally

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How to CREATE a USER - Step 1

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User :
- Go to menu "Directory => Users"
- click on "Add" button

Attention :
- fill in all useful information
- Password won't be sent automatically to the end user

- "Login Name" will be used for Cloud UC End user portal as login
- Language will impact all user's interactions with the SOP
- click on "Save"

How to CREATE a USER - Step 1

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Role of the User
- Go to menu "Directory - Users"
- on the column "role" of the user created, click on "None" and choose a user role

	Status Change	Forward settings	First action	Second action	Personal Menu options	Important numbers	Security options	My groups
Green	✓	✓	✓	✓	✓	✓	✗	✗
Blue	✓	✓	✓	✓	✓	✗	✗	✗
Purple	✓	✓	⊙	✗	✗	✗	✗	✗
Red	✓	✓	⊙	✗	✗	✗	✗	✗

⊙ - remaks:

- Profile purple
  - The manager cannot configure the parameter "When my assistant calls"
- Profile Red
  - The user & the manager can configure the parameter "When I'm on the phone"

How to CREATE a USER - Step 2

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User's Extension
- Go to menu "Directory => Internal Directory"
- click on Add and fill in all useful information

Mandatory Field :

- SOP1 & SOP2 (redundancy if any)
- owner : used for Cloud UC End User portal
- Extension
- First Name
- Last Name
- E-mail : used by voice to email,...
- Profile : "TemplateUser"
- Primary Phone : select a free phone

How to CREATE a USER - Step 3

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Create a DDI

- Go to menu "Directory => Internal Directory"
- click on "Add"
- click on "Advanced View"

Directory

Bulk Administration for profile... ▼   Hide template data   Advanced View   View Licenses   My Extensions   FlexAdmin

Save   Apply   Cancel

SOP1	(all)	Primary SOP for Active-Active or "(all)" to define the extension on every SOP (not Active-Active)
SOP2	(none)	Secondary SOP for Active-Active
Admin		User who manages this extension
Owner		User who owns this extension. Needed for applications
Extension	+3227929700	
First Name		
Last Name		
E-mail		
Mobile number		
Fax number		
Home number		
Site		
Department		
Office		
Context	IncomingNumberMapping ▼	
Group		Used for "Group pick-up"
Profile	Template-MapDDI.Service	
Admin pincode	1234	4 digits pincode. The user pincode is usually set in profile parameters
Primary Phone	No Phone	
Secondary Phone	No Phone	
Source	SMP	
Visibility	Visible ▼	Visibility in applications
Sync to SOP	1	1 to synchronise the extension to the defined SOP's, 0 to not synchronise

Save   Apply   Cancel

Only 3 fields :
- Extension : DDI (start with +countrycode…)
- Context : IncomingNumberMapping
- Profile : Template-MapDDI.Service

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Assign DDI to an extension
- Go to menu "Directory => Internal Directory"
- click on the icon on the profile's column

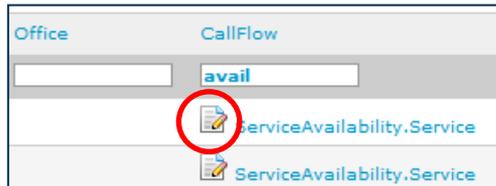|		
+3227929700	MapDDI.Service	No Phone	No Phone
+3227929701	Template-...DI.Service	No Phone	No Phone

- Fill in the extension you want to link to the DDI

Profile Parameter Management

+3227929700 (Template-MapDDI)

InternalExtension: 1000 ...

Save

How to configure Service Availability

Office | CallFlow

avail

ServiceAvailability.Service
ServiceAvailability.Service

1. Create an extension with profile ServiceAvailability.Service
2. In the Internal directory, click on the profile parameters icon

Profile Parameter Management

8000 Time checker always open (Servic

Holiday calendar

List of recurring holidays:
List of non-recurring holidays:

Weekly calendar

Monday: Schedule A
Tuesday: Schedule A
Wednesday: Schedule A
Thursday: Schedule A
Friday: Schedule A
Saturday: Schedule B
Sunday: Schedule B

Work schedules

SCHEDULE A

General

Type of schedule: Always open
Use lunch break check: No

Opening hours

Opening time:
Closing time:

Lunch break

Start lunch break:
End lunch break:

SCHEDULE B

General

Type of schedule: Always open
Use lunch break check: No

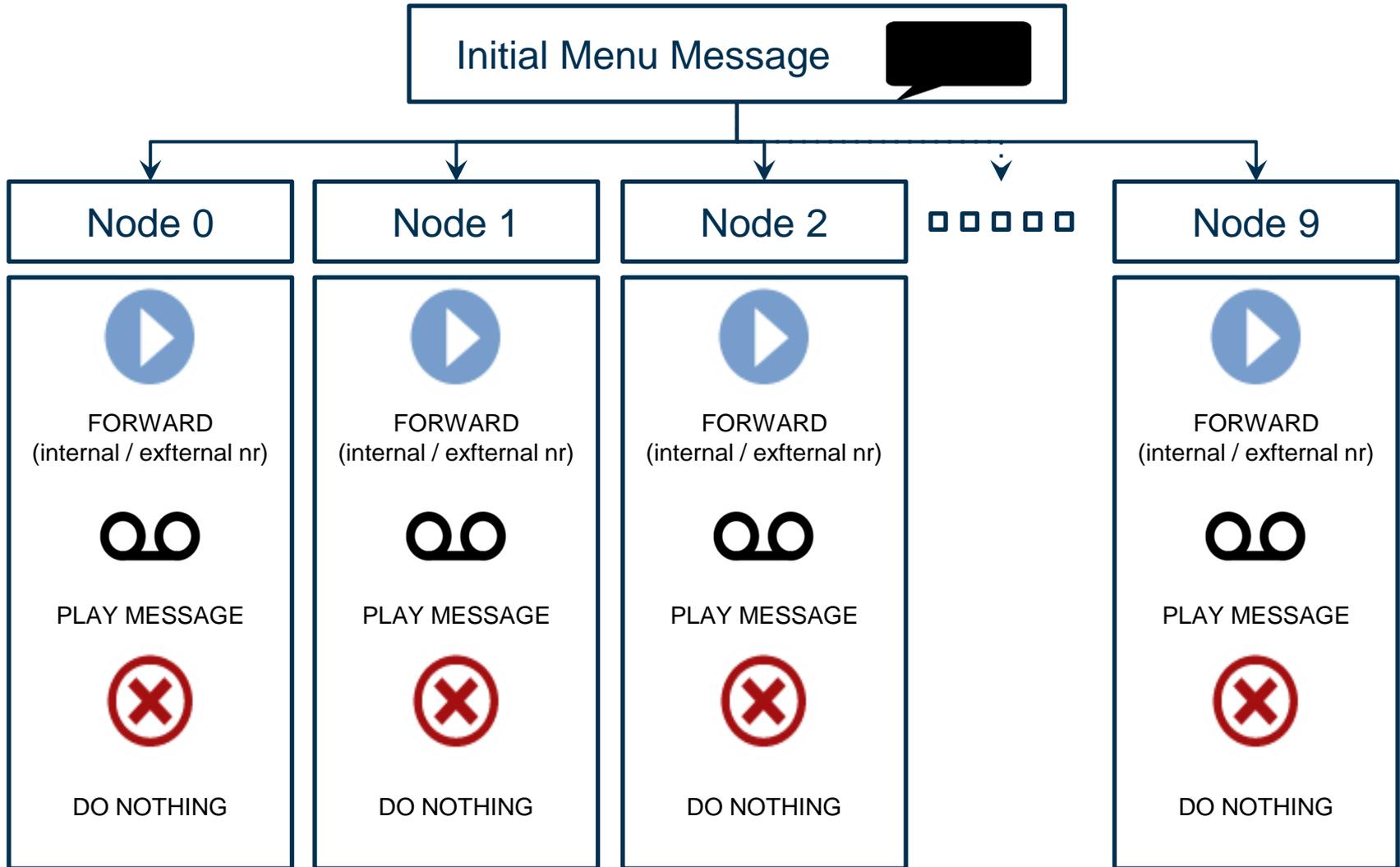Recurring holidays should be entered in the following format: **ddmm**, and should be separated by a "-".
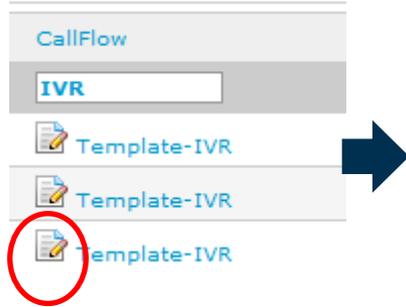For non-recurring holidays use format **ddmmyyyy**
Example
For recurring holidays Christmas and New Year's Day: enter "**-**2512-0101**-**"

Select the right schedule

How to create an IVR

How to create an IVR

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1. Create an extension with the profile Template-IVR.Service
2. In the Internal directory, Click on the profile parameters icon
3. Fill in the different parameters

Yes/No – if Yes don't forget to create your extension and add it in this field.

For each node

How to create an IVR

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How to record the initial menu message?

##90*<IVR extension>*
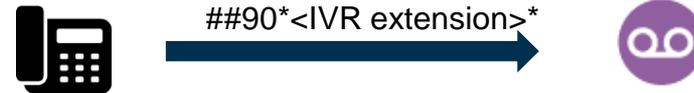
How to record a message for the nodes?

##90*<IVR extension>*5<node>

How to record an error message?

##90*<IVR extension>*7

↳ Error message will be played in case the end user makes a wrong selection

Record IVR welcome message	##90*<IVR extension>*1
Record IVR holiday message	##90*<IVR extension>*2
Record IVR outside office hours message	##90*<IVR extension>*3
Record IVR lunch message	##90*<IVR extension>*4
Record IVR message	##90*<IVR extension>*5<node>
Record IVR no input	##90*<IVR extension>*6
Record IVR error message	##90*<IVR extension>*7

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- Link conference room extension to virtual conference room
  - Possible to link multiple numbers to same conference room, e.g.:
    - Number for internal use – no pincode required
    - Number for external use – pincode required
  - Up to 20 virtual conference rooms available !
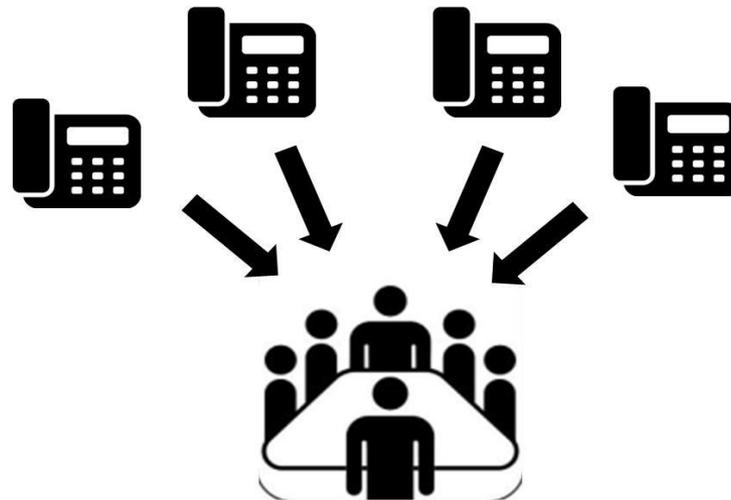
Dial « conference number »
and enter a « pincode »

How to create a Conference Room

- Link conference room extension to virtual conference room
  - Possible to link multiple numbers to same conference room, e.g.:
    - Number for internal use – no pincode required
    - Number for external use – pincode required
  - Up to 20 virtual conference room profiles standard included !

- Pincode
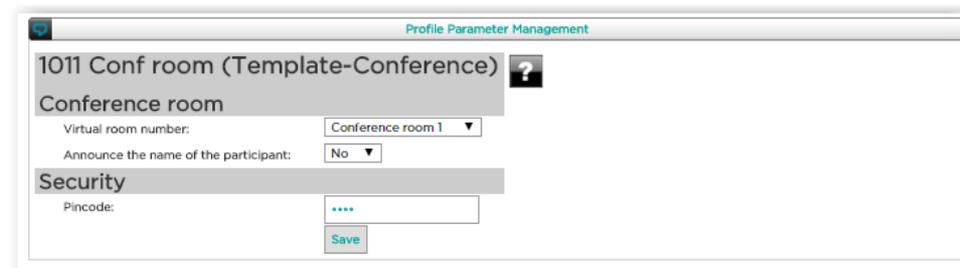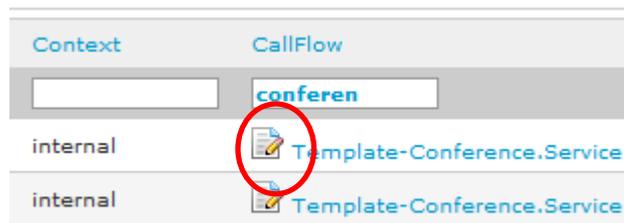
In the Internal directory
Click on the profile parameters
icon

How to manage a Group?
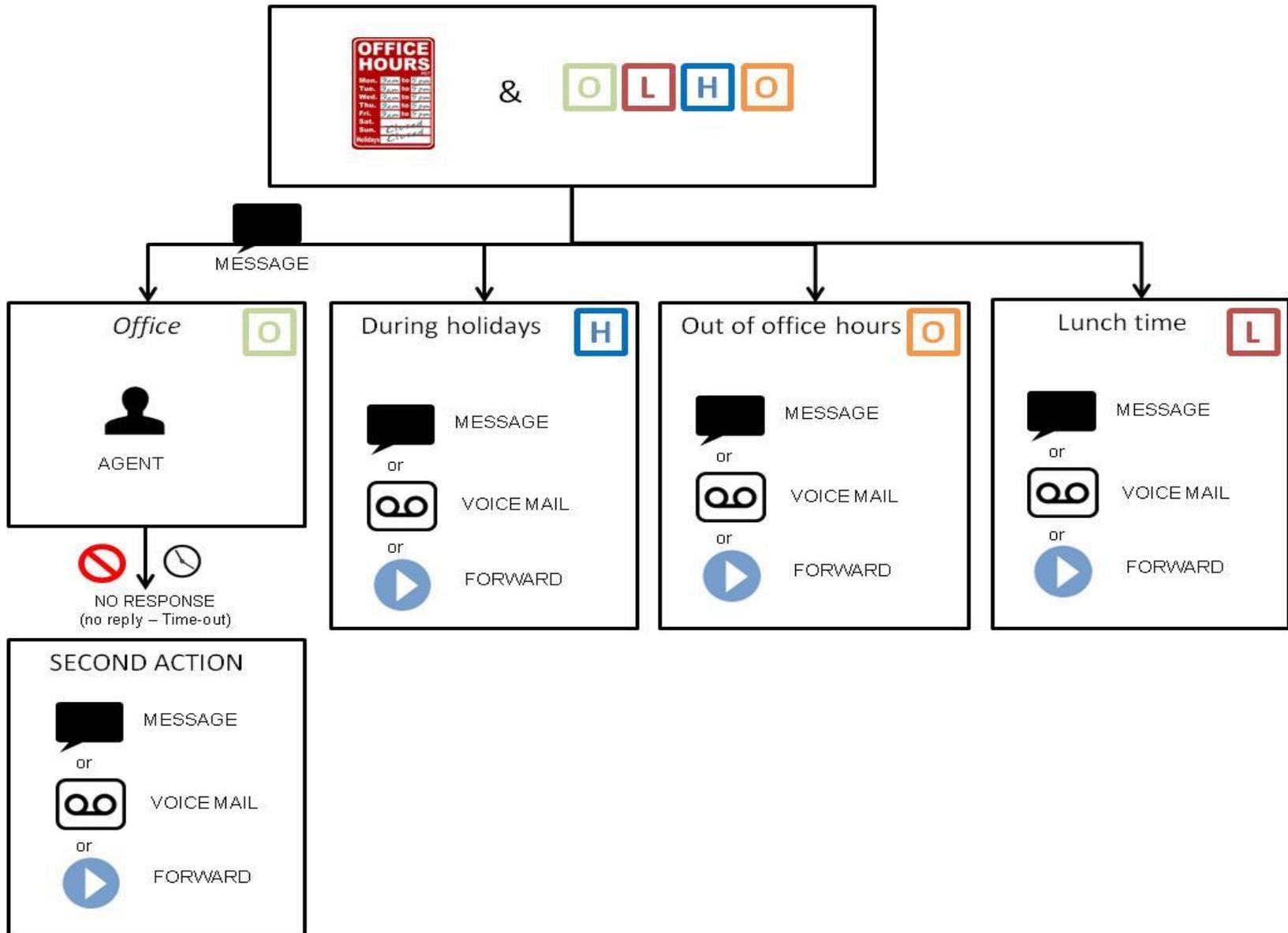
- Create an extension with profile **template-CallQueuer**

- The **firstname** will be used to show on the phone that calls are for the group

  firstname - <original name>

- If you want a "Time checker" (optional) you'll need to create another extension with profile **ServiceAvailability**

Group Management – Call Queuer

Group Management – Call Queuer

Step 1. Create a Queue

Step 2. Configure the Queue

General Resource Parameters

Resource Version	Queue 3.1.0 (early deployment)
	○ no templating ○ this is a master resource
Resource ID	AQA00001
SOP 1	00027141 srv27141 (Fusion-DC1) ▼
SOP 2	none ▼
Directory Identifier	-- Select Extension --
Source	SMP ▼
*Queue name	FO
Music on hold	(set in callflow) ▼
Ring strategy	ringall ▼
Timers	Member ringing time:
Retry	
Weight	0 ▼
Permanent members	Available

Select the music-on-hold

Ring Strategies :

ringall (default): ring all available agents until one answers

random: send randomly the call to any member

rrmemory: take turns ringing each available interface for new incoming calls in the order they were added to the queue. The next phone will ring in case there is a new call, or because an agent did not answer the current call to be distributed. Last phone that rang is kept in memory. Every call to distribute will go to the next agent.

leastrecent: ring agent which was least recently called by this queue

fewestcalls: send the call to member having handled the fewest amount of calls

Available:
1000 (Fax) - SDSD0002
1001 (Test User1) - SDX60001
1002 (Test User2) - SDX60002
1003 (Test User3) - SDPA0001
1003 (Test User3) - SDX60003
1004 (Test User4) - SDPH0001
1004 (Test User4) - SDX60004
1005 (Test User5) - SDPI0001
1005 (Test User5) - SDX60005
1006 (Test User6) - SDX60006
1007 (Test User7) - SDX60007
8011 (An Last name 11) - SDX60011
SDP8Z000
SDPAZ000
SDPEZ000
SDPGZ000
SDPHZ000
SDPIZ000
SDPJZ000
SDPKZ000

Selected

Move UP
Move DOWN

Add >>   << Remove

Group Management – Call Queuer

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Step 3. Configure agent in Queue

	Permanent members	Dynamic login feature
How to setup?	Define agents phones as permanent members in the queue resource	Configure the queue as first, second or third group in the user's profile parameters, section "My queues" (admin only)
Member priority (penalty)	You can choose in which order the members will be called in their profile parameters. Lowest penalty are called first (1 to 10)	You can choose in which order the members will be called in their profile parameters. Lowest penalty are called first (1 to 10)
How to login/logout?	Always logged in, even if user modifies his intentional status	Login/logout when change intentional status, section "My Queues" in user's profile parameters (admin only)

Step 4. Configure the Call Queuer

1. Create an extension with profile « Template-CallQueuer »
2. In the Internal directory, Click on the profile parameters icon

Profile Parameter Management

1103 Sales (Template-CallQueuer)

General settings

SECURITY SETTINGS
- Pincode *: ••••

WHEN NO AGENTS ARE AVAILABLE
- Action: Play a message
- Number to forward to:

Time based routing
- Activated: Yes
- Extension: -- Select Extension --

OUT OF OFFICE HOURS
- Action: Play a message
- Number to forward to:

DURING LUNCH
- Action: Play a message
- Number to forward to:

DURING HOLIDAYS
- Action: Play a message
- Number to forward to:

WHEN ABSENT
- Action: Play a message
- Number to forward to:

First action
- Play welcome message: No
- Queue: AQA00004 (S)
- Display name: Sales
- Polycom based net.Console: No
- Ring time: 10 seconds
- While waiting: Play music

Second action

WHEN TIMEOUT
- Action: Call forward
- Number to forward to: 1101

* The value of this parameter on the SOP prevails on the value from the SMP. The displayed value is taken from the SOP, when pressing save the value will be pushed directly to the SOP database.

Save

Yes/No – if Yes don't forget to create your extension and add it in this field.

Queue to be created via SMP > resource > Queue. (see next slide)

First and second action

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Step 5. Configure the Call Queuer

How to record the welcome message ?

##90*<CallQueuer extension>*1

Other Records

Record CallQueuer welcome message	##90*<!CallQueuer extension> *1
Record CallQueuer holiday message	##90*<!CallQueuer extension> *2
Record CallQueuer outside office hours message	##90*<!CallQueuer extension> *3
Record CallQueuer lunch message	##90*<!CallQueuer extension> *4
Record CallQueuer no answer message	##90*<!CallQueuer extension> *8
Record CallQueuer no agents	##90*<!CallQueuer extension> *9

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<u>Note : How to change the Configure the Call Queuer</u>
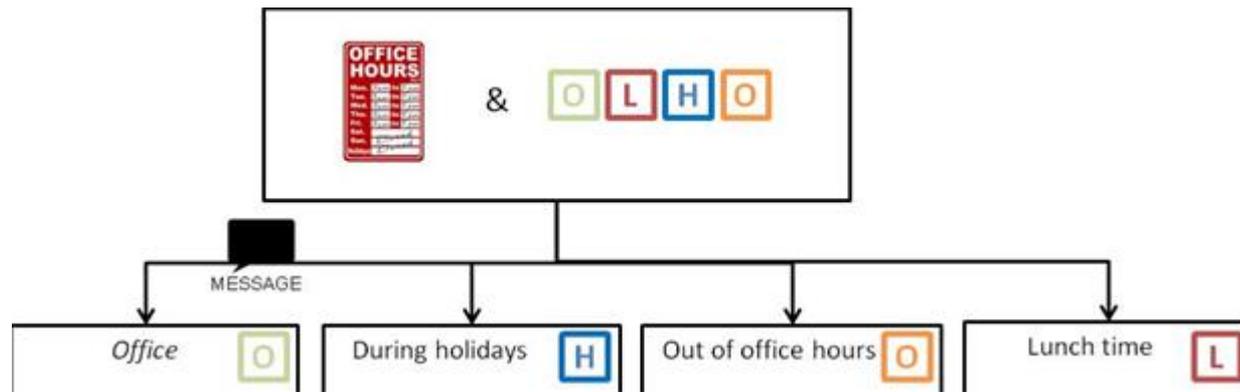
You can also change the status "manually" to Office, OutOfOffice, Lunch or Holiday.

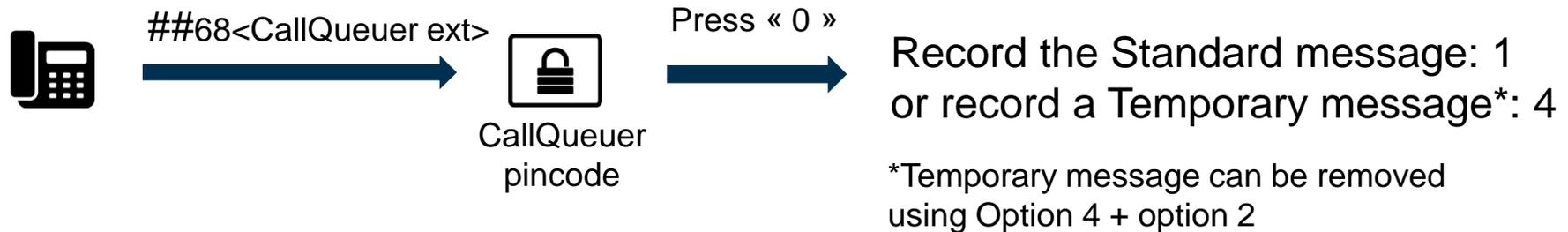Status can be changed
> ⇒ on the SMP
> ⇒ by calling ##71<callqueur_ext> (pincode of the Call Queuer extension will be requested).

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Note : Voice mail of a Group (Call Queuer – valid al

By default message following Voicemail prompt is played :
« The person with extension xxxx is unavalable »

How to record the voicemail prompt?
Use shortcode « Consult voicemail of other extension »

##68<CallQueuer ext>

Press « 0 »

CallQueuer pincode

Record the Standard message: 1
or record a Temporary message*: 4

*Temporary message can be removed using Option 4 + option 2

How to listen to voicemails?

##68<CallQueuer ext>

CallQueuer pincode

Voicemails are also sent to the e-mail address configured for the CallQueuer extension

How to configure Cloud UC End User portal

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The following is needed to configure Cloud UC Softphone End User portal:

- a user
- an extension
- Link the user with the extension within the internal directory
- an URL that is linked towards the Cloud UC webpage
  (*.clouduc.colt.net - please contact Colt for this step).

The URL will redirect to the customer's SOP.

<u>Attention :</u>
- Active-active is not supported by Cloud UC Softphone portal.
- Having more than one extension with the same owner is not supported

Other Profiles

1) **Template-ShortNumber.service** :

- you can configure an extension which is automatically redirected to his « home number »

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2) **template-virtualfax.service :**
  • The virtual fax allows you to receive faxes in PDF format in your mailbox. Configure the e-mail address where the fax should be send to in the e-mail field of the extension. Keep in mind following requirements:
      • The mail server should be configured
      • The fax server should be configured

3) **template-fax.service (T.38)**
  • T.38 is the preferred way of configuring your fax devices.
  • Faxes can still be connected to an FXS card on the SOP, but this is discouraged (due to increased complexity and price)
  • Every ATA box that is used to connect a fax device, should be configured in a special restriction group. Have a look at the installation guide for more information
  • In case of a cluster environment, the ATA box should always be connected to the SOP that initially receives the fax. Have a look at the installation guide for more information

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For your time

Thank you