Cloud Services Portal

Administrator

Teams Sections

Quick Reference Guide

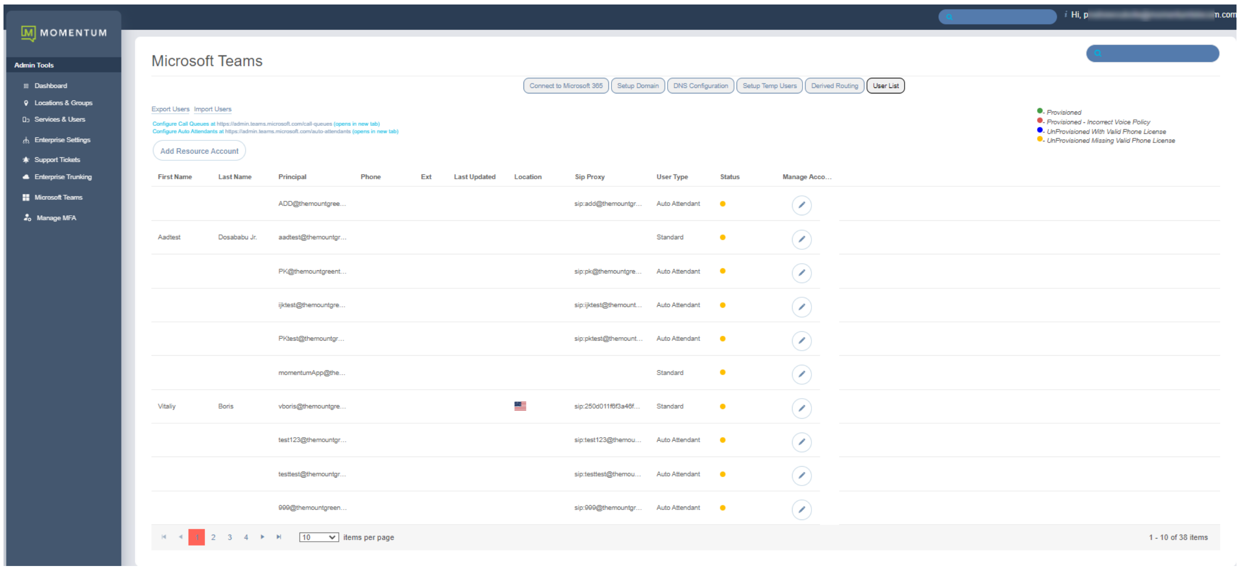
MOMENTUM

25Q4e

*MICROSOFT TEAMS

Limited/Restricted Access. Only organizations that have Microsoft Teams DR integrations may see this Teams section and only Authorized Microsoft Teams Administrators <u>should</u> access and use these management tools.

Your Microsoft® Teams section offers access to tools for basic non- TAC management of user voice network TN assignments for service provider licensed MS Teams user and resource account numbers.



The default tabs listed at the top of your Microsoft Teams section can include:

Teams Section Tabs:

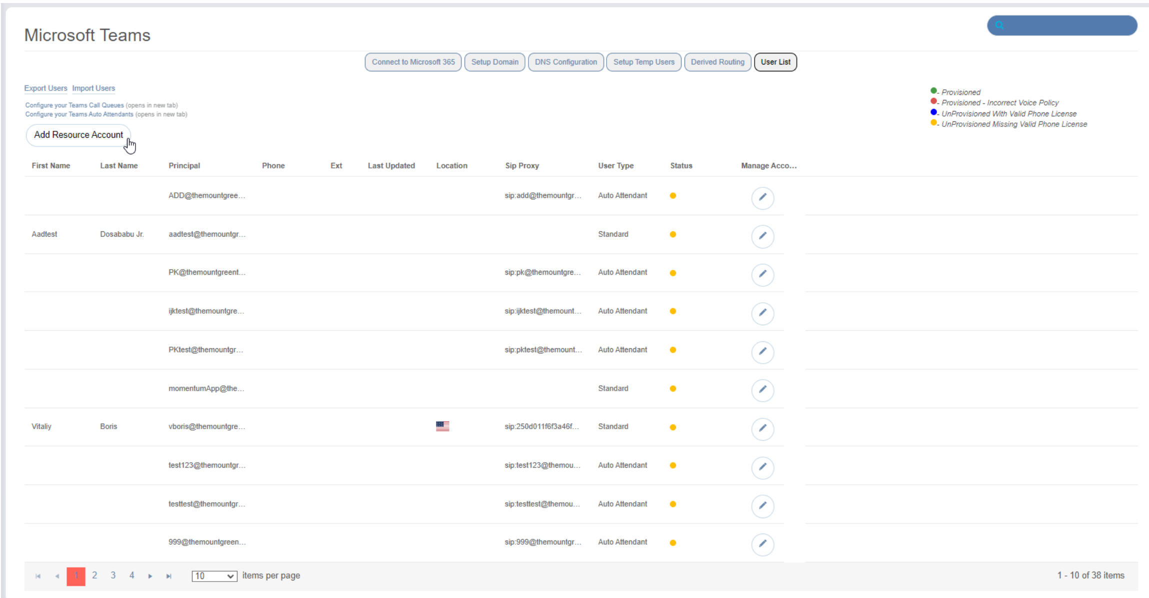
- Connect to Microsoft 365 - Restricted/Limit access to Teams Admins to connect to MS Teams account
- Setup Domains - Restricted/Limit access to Teams Admins to setup domains on correct zones
- DNS Configuration - Restricted/Limit access to Teams Admins for DNS configuration
- Setup Temp Users - Restricted/Limit access to Teams Admins to create example temp users
- Derived Routing - Restricted/Limit access to Teams Admins for Derived Routing setup
- User List - Restricted/Limit access to Teams Admins to manage user TN / Call Routing assignments and license provisioning status for the integration with the service provider's network

Note: If connected, a limited set of tasks may be completed in this portal. MS Teams Admins can review useful deployment / setup information and manage settings limited to Call Routing access or TN assignment changes within these sections. Microsoft Teams Admins may access the full set of the assigned user and account administration tools for their MS Teams instance by logging into the appropriate **Microsoft Teams/ Microsoft 365/O365 Administration Portal** <u>directly</u> for performance of those Teams administration tasks.

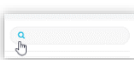
User List

This Microsoft Teams tab section is the default post-deployment view for Authorized Teams Admins.

The User List provides tools to review basic Teams User information and Edit each Teams user's TN assignment or call routing setting from this portal and offers read-only access to select additional Teams Account information from the Teams Admin portal. This section is the default view when opening the Microsoft Teams section once the deployment steps in the other tabs have been completed.

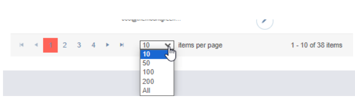


Section Search



Enter terms to locate data specific to the User List section.

Pagination Tools



Columns

The column headers allow sorting of list contents alphanumerically. The Phone column contents offer a link to each User's Dashboard after TN assignment for easy access to view or edit any non-Teams voice services/settings available for management in this portal. The Status column offers a visual indicator of each account's current setup/readiness for use. Reference the legend (top right) for color code information.

Edit

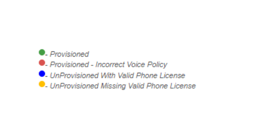
Teams Admins Only. The Edit button next to each listing in the table opens the Edit dialog for basic TN and Call Routing maintenance.

Export / Import Users

Teams Admins Only. Use with caution. Incorrect use/formatting can be service impacting. Click these links to Export a correctly formatted .csv file to update TN assignment or routing enable/disable settings for multiple Teams accounts (already in the system/listed), and then Import the correctly formatted file into the portal. Or - simply use the Edit tools for a specific listing. Contact Customer Support for assistance.

Status Legend

Teams Admins Only. A simple legend (top right) offers inofmration about the license/ acttivation status for DR accounts



Search Teams User List

The section Search field at the top of this tab allows the Admin to enter terms to find within the User List. Matching listings display for review or selection. Remove the search term from the field to redisplay the full default list view.

Export List

The Export link creates a pre-formatted .csv spreadsheet file containing the current list of Teams Users that can be opened for review/edit and saved locally. This data is imported from Microsoft Teams. Only the TN assignment and routing on/off setting can be updated using this form.

1. Click the Export link (top right). The system will create a file for review and download locally.
2. Click on the *MSUser (x).csv* file that displays at the bottom of the browser to open or save the file locally.
   This file is useful for reporting or to update TN assignment or routing enable/disable settings for multiple Teams user accounts (already in the system/listed).

3. Use the browser or application tools to Save the copy to a local folder or system file.

Import List

Click the Import link at the top right of the *User List* view to import a correctly formatted .csv file into the portal. This is useful when there is a need to update the TN Assignments or call routing enablement of a large number of Teams Users "in bulk'. Otherwise, the Edit icon next to a User in the list offers access to complete this task for individual Teams Users. Use caution. See also: Export List.

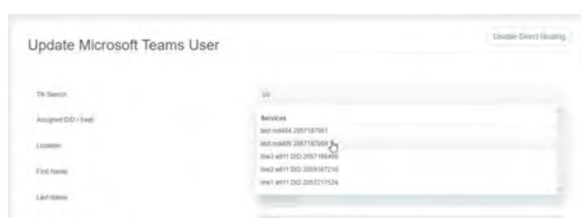
Manage TN Assignment

Authorized Admins may have access to assign and edit Teams User TN assignments within Microsoft Teams > User List. Please note, that the majority of the information displayed to Admins in this section is read-only and offered as a reference. Fields that display a red circle with a slash icon when the cursor is hovered are read-only.

1. Click on the Edit icon adjacent to the desired User in the far-right Manage column.

While working in Microsoft Teams > User List:

The Update Microsoft Teams User dialog displays. In this view, only the TN Search field at the top of the list allows the Admin to make changes; the other fields are read-only.



2. Click within the TN Search field to use the dynamic search tool to locate unassigned telephone numbers in your inventory that can be selected for this user. *As you type a useful search entry, the list will filter to show any available TNs that contain matching information for review and selection.*

3. Click on an item within the search results to select it and assign it to the user.
   The system will automatically update this Teams User's settings to use this new TN for calling.
   Upon completion, click on the User List button at the top of the view to return to the Account List view - or select another area of the Cloud Services Portal.

Manage Routing Setting

Authorized Teams Admins may have access to manage the Teams User or Resource Account call routing within this portal. Please note, that the majority of the information displayed to Admins in this section is read-only and offered as a reference for the settings/ features that are managed within the MS Teams Admin portal.

While working in Microsoft Teams > User List:

1. Click on the Edit icon adjacent to the desired User within the list in the far-right *Manage* column.
   The Update Microsoft Teams User dialog displays. In this view there is a button to Enable or Disable Routing for the Teams User.

2. Click on the **Enable/Disable Phone Routing** button (top right).
   This button is dynamic and shows the action that can be taken currently.
   For example, when mapping has already been setup the button displays
   Disable User Mapping.
   - **Enable**: Ensure a TN has been assigned and confirmed and then click Enable Routing
   - **Disable**: Click the Disable Routing button to turn it off.
     Use Caution: This action also removes the current TN Assignment.

3. Click on the Yes button to continue and make the change - or click No to stop and return to the list view without making a change.

MS Teams Deployment Tabs

Connect to Microsoft 365

Teams/Microsoft 365 Administrators Only. This Microsoft Teams section tab is for deployment of the connection to the MS Teams instance and use should be restricted to MS Teams Administrators.
It allows an authorized Teams Admin to begin the setup and deployment process by securely entering and verifying the correct Admin Username/Password access credentials for their Microsoft 365 or O365 Teams account to create the connection and synchronize. Other fields in this tab are pre-formatted to contain the correct information and cannot be edited. The Notes section displays instructions and information about tasks performed at this step in the deployment process.

During Deployment: The User Name and Password fields need to be completed with the Microsoft365/ O365/Teams account access credentials, Saved, and then Verified. All other fields are read-only and pre-formatted to contain the correct information for setup. The password credentials are secured and obscured. Read-only fields display a red icon when the cursor is hovered over the field.

Post Deployment: The User Name and Password may be updated (and verified) by an authorized Teams Admin when necessary. All other fields remain read-only.
Only a Teams Admin should attempt to make changes in the Microsoft Teams section.

Add Microsoft Teams Account Admin Access Credentials

1. Enter Microsoft 365/O365 Administrator User Name and Password credentials using the secured fields provided.
2. Click Save to update.
3. Click Verify Credentials - the system will verify the connection and provide a success or failure notification.
   Check the account information in Microsoft 365/Teams and retry entry of credentials as necessary until a successful connection is made.
4. If this is the initial deployment, click Continue (or click on the Setup Domain tab) to proceed to the next deployment step - or select another Admin Tools menu option to complete other tasks.

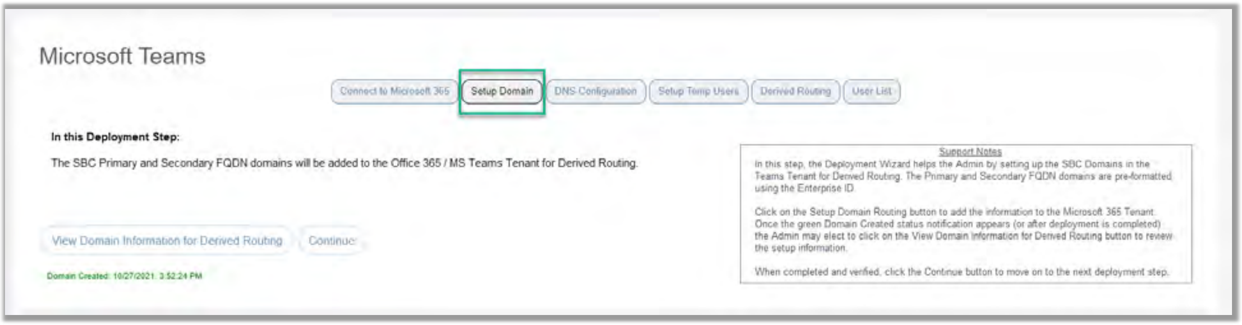
Edit Microsoft Teams Account Admin Access Credentials

Only Authorized Teams Administrators should be permitted to edit the account access credentials for the organization's Teams instance connection within the Cloud Services Portal when they have been updated/changed in the Microsoft 365 account.

1. Enter new Microsoft 365/O365 Administrator User Name and Password credentials
2. Click Save when the new credentials are entered.
3. Click Verify Credentials and wait for the success notification.
   Check the credentials in MS Teams and try again if the verification process is unsuccessful.

Setup Domain

During the deployment process, this tab section provides access for an authorized Teams Admin to submit the domain information and complete the first step for enabling Derived Routing for the account. The Notes section offers brief instructions and information about the task performed at this step.



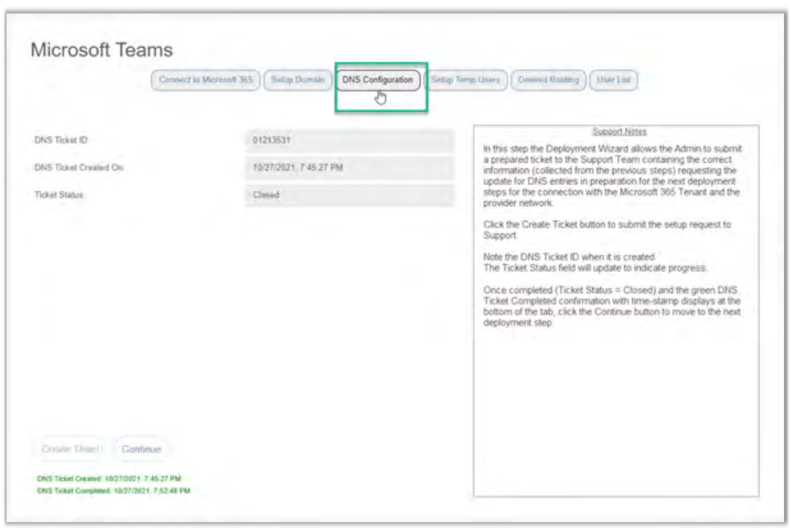
The information in this deployment tab is read-only and cannot be edited.
An authorized Teams Admin may click the Setup Domain Information for Derived Routing button to perform this deployment task. A creation timestamp displays at the bottom of the tab when completed.
Click Continue to move on to the next step in the deployment process.

View Domain Information for Derived Routing

Post-Deployment, an authorized Teams Admin may review the setup completion notification and click View Domain Information for Derived Routing to see the setup information in this tab.

DNS Configuration

This deployment wizard tab allows an authorized Teams Admin submit a request for DNS domain creation and configuration on the correct zone for the account. The Notes section displays brief instructions and information about the tasks performed in this tab for deployment.



The information in this tab is read-only cannot be edited.

An authorized Teams Admin may click the Create Ticket button during this step in deployment to auto-submit a prepared ticket to the correct department and then review ticket number and subsequent completion notifications when that process is complete and the ticket is closed.

Once the Ticket Completed notification displays below the buttons in the tab, click Continue to display the next tab and the next deployment step.

Create DNS Configuration Ticket

An authorized Teams Admin may click the Create Ticket button during deployment to submit the prepared ticket to the correct department for DNS Configuration. Once submitted, the MS Teams Admin may review ticket number and subsequent completion notifications when that process is completed, and the ticket with the Service Provider has been closed.

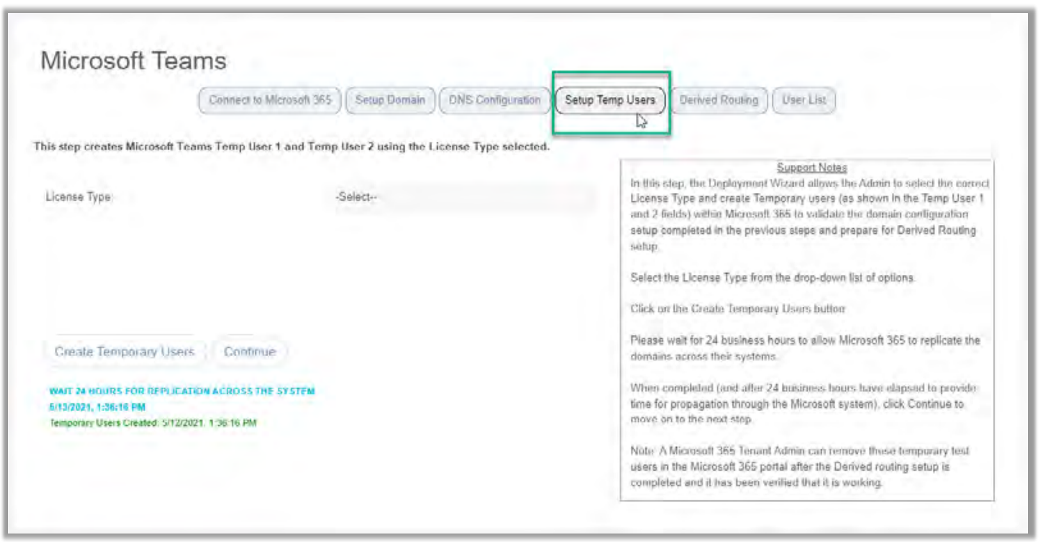
Click Continue when configuration is complete to display the next deployment step.

Post Deployment: Authorized Teams Admins may access this tab to review the setup completion notification data and the ticket closure date/time information for this step in the deployment process.

Setup Temp Users

During the deployment process, this tab allows an authorized Teams Admin to specify the correct License type and then generate the pre-defined temporary users for the account. The system will take some time to replicate and update completely before further deployment tasks can be performed.

The Notes section may display instructions and information about for the tasks performed in this section for deployment.



During Deployment: The two Temp Users displayed in this tab are auto-populated from those set up in MS Teams and cannot be edited. The Teams Admin may complete the following tasks here:

- Select the correct License Type from the drop-down list of supported licenses.
- Click the Create Temporary Users button. This submits the information for creation.
  Upon completion, Authorized Teams Admins can review the creation notification data.
- Check back after 24 hours to review and click the Continue button to move on to the next step.

Post Deployment: Teams Admins may review the setup completion notification / task completion date/time information for this step in the deployment process.

Derived Routing

This Microsoft Teams section is for deployment and has restricted/read-only access for Admins.

During the deployment process, it provides access for an authorized Teams Admin to Verify the domain information and complete the step for enabling Derived Routing. The Notes section offers brief instructions for the task that can be performed in this tab.

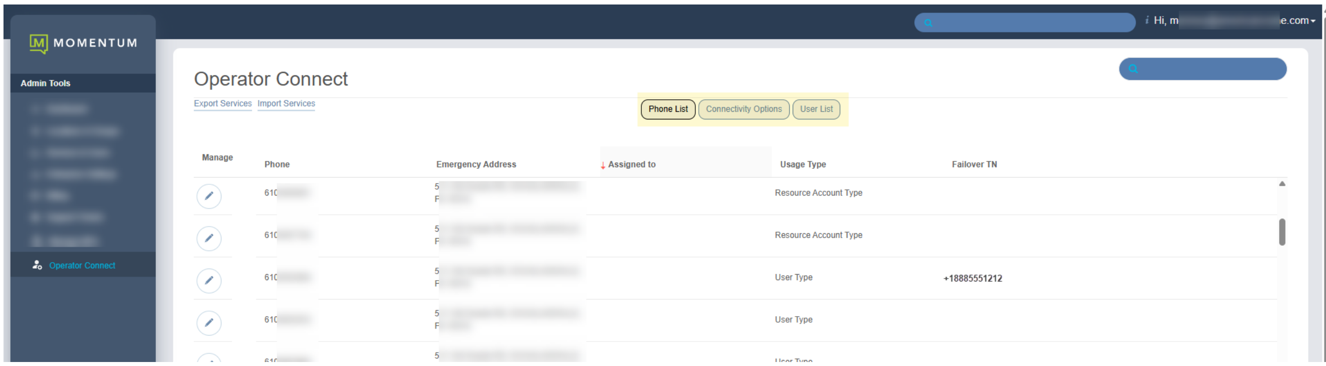
During Deployment: The fields in this tab are auto-populated with the correct information and cannot be edited. An authorized Teams Admin may click the Setup Derived Routing button during Deployment to initiate the setup process. Note: this process takes approximately 24 business hours to complete and replicate across the system. Once the setup process is finished, a notification of setup completion displays with a timestamp. At that point the Admin may click Continue to move on to the next step (User List) in the deployment process.

Post Deployment: Authorized Teams Admins may review the setup completion notification data and the derived routing readiness verification information in this tab.

*OC TEAMS

Limited/Restricted Access. Only organizations that have Operator Connect (OC) Teams integrations may see this Teams section and only Authorized Microsoft Teams Administrators should access and use the management tools within this section.

Your Microsoft® Teams section offers access to tools for managing the basic user voice network TN assignments for licensed MS Teams user and resource account numbers.



The default tabs listed at the top of the Operator Connect section can include:

- Phone List - Restricted/Limit access to Teams Admins for Teams phone number list sync/review and basic TN Failover or line type management
- Connectivity Options - Restricted/Limit access to Teams Admins: Provide consent to the service provider to connect with your Teams Tenant (via API)
- User List - Restricted/Limit access to Teams Admins - manage hybrid (if in use) TN / Call Routing assignments or the integration with the service provider's network

Note: Coming Soon...
Depending on service purchases, additional tabs may display to offer related tools or information (e.g.: Teams Fax)

Note: If connected, a limited set of tasks may be completed in this portal. MS Teams Admins can review useful deployment / setup information and manage settings limited to Call Routing access or TN assignment changes within these sections. Microsoft Teams Admins may access the full set of the assigned user and account administration tools for their MS Teams instance by logging into the appropriate **Microsoft Teams/ Microsoft 365/O365 Administration Portal** directly for performance of those Teams administration tasks.

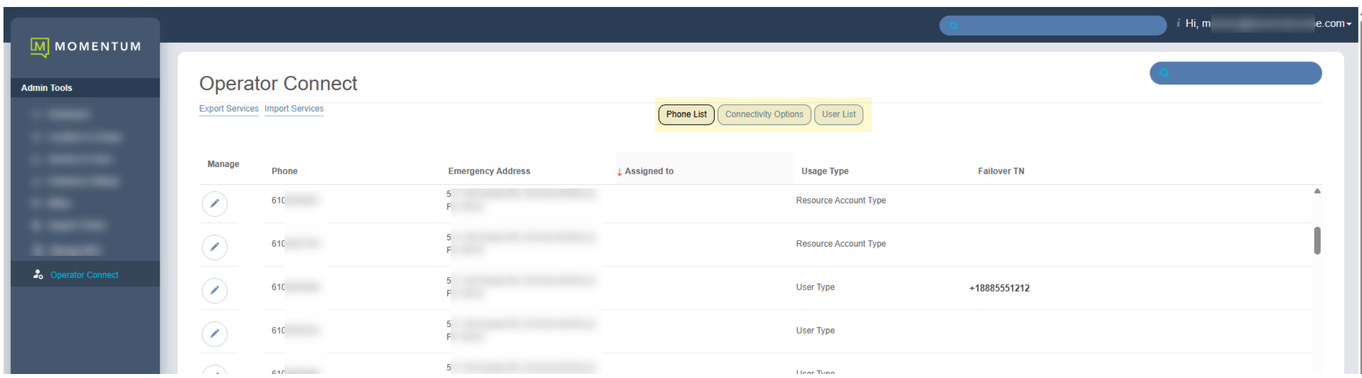
Phone List

This OC Teams tab section is the default post-deployment view for Authorized Teams Admins.

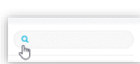
During Deployment: This tab provides the list of licensed numbers found on the OC teams account and their basic teams usage type (user/resource account).

Post Deployment: The Edit icon under the Manage column (far left) opens a simple edit dialog where the TN can be modified, the Failover TN can be defined, and (if all add-ons have been removed, the Admin can change the line type.

The Phone List provides tools to review basic account information and Edit or manage each Teams user's TN assignment or call routing setting from this portal and offers read-only access to select additional Teams Account information gathered from the Teams Admin Center (TAC).

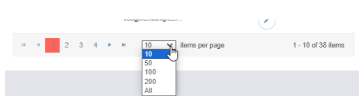


Section Search



Enter terms to locate data specific to the User List section.

Pagination Tools



Columns

The column headers allow sorting of list contents alphanumerically. The Phone column contents list Teams TNs. The Emergency Address lists the address on file, Assigned To lists the name (if known), Usage Type lists the current usage, Failover TN lists any defined TNs per account. Reference the legend (top right) for color code information.

Manage / Edit

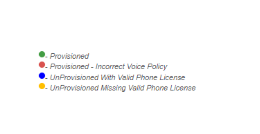
Teams Admins Only. The Edit button next to each listing in the table opens the Edit dialog for basic TN and Call Routing maintenance.

Export / Import Users

Teams Admins Only. Use with caution. Incorrect use/formatting can be service impacting. Click these links to Export a correctly formatted .csv file to update TN assignment or routing enable/disable settings for multiple Teams accounts (already in the system/listed), and then Import the correctly formatted file into the portal. Or - simply use the Edit tools for a specific listing. Contact Customer Support for assistance.

Status Legend

Teams Admins Only. A simple legend (top right) offers inofmration about the license/ acttivation status for DR accounts



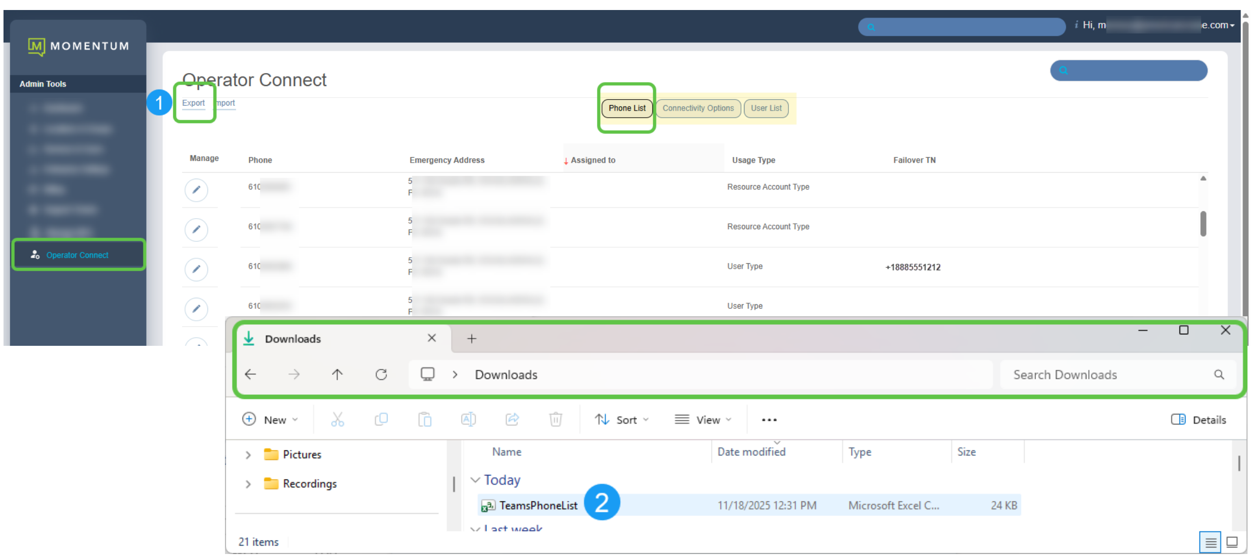
Search Teams Phone List

The section Search field at the top of this tab allows the Admin to enter terms to find within the List. Matching listings display for review or selection. Remove the search term from the field to redisplay the full default list view.

Export List

The Export link at the top of the Phone List tab creates a pre-formatted .csv spreadsheet file containing the current list of Teams Users that can be opened for review/edit and saved locally. This data is imported from Microsoft Teams. Only the TN assignment and routing on/off setting can be updated using this form.

1. Click the Export link (top right). The system will create a file for review and download locally.
2. Click on the *TeamsPhoneList(x).csv* file that displays at the bottom of the browser or in your downloads file to open or save the file locally. This file is useful for reporting or to update TN assignment or routing enable/disable settings for multiple Teams user accounts (already in the system/listed).
3. Use the browser or application tools to name and save the copy of your updated .csv to a local folder or system file that you can locate/access easily.



Import List

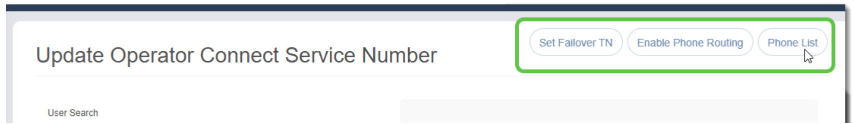
Click the Import link at the top right of the *Phone List* view to import a correctly formatted .csv file into the portal. This is useful when there is a need to update the TN Assignments, or call forwarding or routing enable/disablement of a large number of Teams Users "in bulk'.

Important Note: The Edit icon next to a User in the list offers access to complete these tasks quickly and easily for individual Teams accounts. Use caution - correct data entry formats must be used for all data entries in the .csv or the entire import attempt will be disregarded.
See also: Export List.

Manage / Edit Line Settings

Authorized Admins may have access to assign and edit Teams TN or account assignments within Microsoft Teams > User List > Fields in the Edit dialog that display a red circle with a slash icon when the cursor is hovered are read-only. Please note, that the majority of the information displayed in this dialog is read-only and data in the read-only fields is offered as a reference only.

OC Teams Update/Edit Dialog Tools



Context Sensitive Save Button
A button displays top left that is context sensitive based on the feature being updated below.
This button could be for changes to *Failover TN* or *Update Usage/Change Line Type*.

Enable/Disable Phone Routing Button
Used only when setting up or ending alternate routing for the Teams account line.
Always contact the Service Provider for use advice within your system prior to making changes.

Phone List Button
This button immediately returns the Admin to the Phone List view.

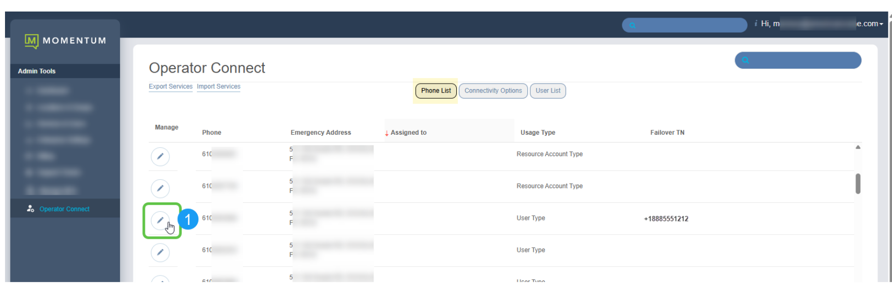
Available OC Teams Account Setting Fields
Most data here is simply imported from Teams and cannot be edited in this dialog.
Fields that can be edited or used here include: User (TN) Search, Failover TN, and Usage Type.

Manage Failover TN

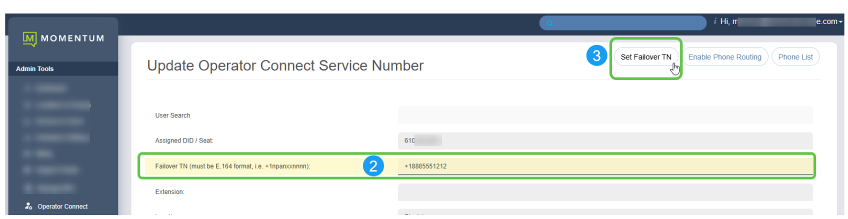
Each assigned eligible Teams line license type can have a failover TN defined for it here in case of Teams calling switch outage. Once the Failover number is defined, the voice system will use it during emergencies where a Teams calling switch outage is identified and Teams calling is not available. Note: Ineligible teams lines include Shared Numbers or Reserve (unassigned) numbers. These are noted in the Phone List table as unavailable and the field for Failover TN data entry does not display in the edit dialog. There are two methods for managing this useful backup number for emergency situations:

A: Per Individual Eligible Line

1. Click the Edit icon first column to view the line's settings in a new dialog.
2. Failover TN: Enter one10+ digit phone number to be used in case of outage into this field, using the full **E. 164 telephone number format**. (Example: +18885551212). Ensure the plus sign is used at the start of the TN and there are **no** other special characters or spaces in your phone number. **CAUTION**: The E. 164 format is required to be in place on the Teams side, but erroneous entries that do not follow the format can be saved here. If set in the wrong format, the failover TN function will not work when needed. Always verify that this entry is in the correct format.



3. Click on the Set Failover TN button (top right) to save your entry and update the system.



B: Multiple Line Bulk Import

Use caution and ensure the correct formats are used when attempting to utilize the bulk import tool. If data entry errors are imported, the entire file upload will be ignored without notification.

See also: Export List and Import List

Change Usage / Line Type

For OC Teams account Admins who have been granted access to manage line type changes within this portal, the Usage Type field in the Manage/Edit dialog for a Teams account in the Phone List can be used to make these changes. Use Caution. Line Type usage changes are billing impacting.

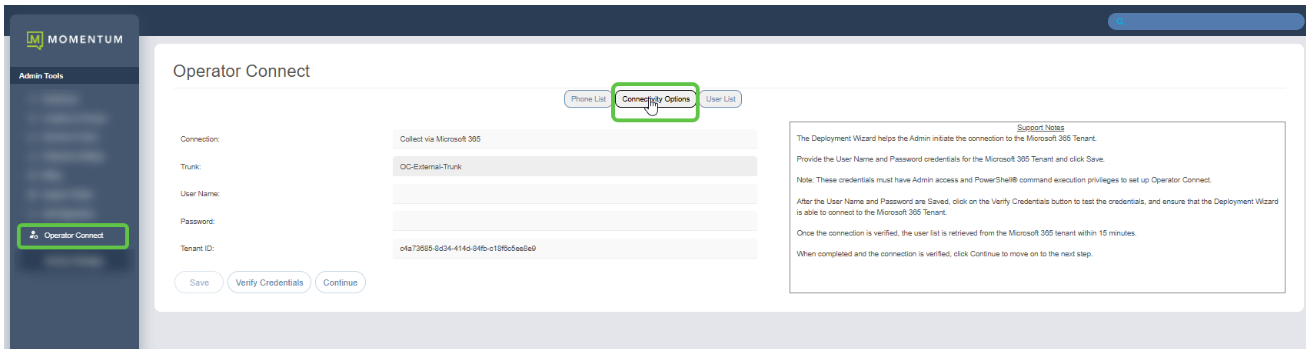
1. **Important Step:** Before making any changes to the line type here, the Admin ***must*** ensure that any user or account add-ons (e.g.; fax, call reporting, call recording, etc.) have already been removed from this **Teams line/account in TAC** prior to switching usage types in this dialog. This ensures appropriate billing and functionality changes are made as expected without negative impacts to usage, functionality, or access.
2. Open the Manage/Edit dialog for the OC account in the Phone List by clicking on the adjacent icon.
3. Click on the drop-down menu in the Usage Type field.
4. Select an alternate usage type option from the drop-down menu selection tool. The options can include: User Type, Reserve/Parked Type, Shared Type, Resource Account Type.
5. Once you have chosen a new usage type, click on the **Save Updated Usage** button that now displays top left and then confirm your change by clicking **Yes** when prompted, or click **No** to halt and modify or exit.
   When confirmation of the change is submitted, the system begins the 10-15 minute process of automatically changing the license type, updating billing, and connecting with your Teams account to update the usage type there, as well.
6. Wait 10-15 minutes for full propagation across all services and systems before attempting to make changes to the account for alternate usages in your TAC.

   TIP: The Admin can check the View All Changes list in the Service Changes section to watch for change request status updates until the process is completed or to review past license type changes.

OC Teams Deployment Tabs

Connectivity Options

In this tab, the Teams Admin may enter their TAC access credentials, verify connection, rand review, confirm, and accept the Operator Connect Terms & Conditions. Notes with instructions or tips are provided.



OC Teams Coming Soon

Some OC Teams accounts may soon see additional tabs in the OC Teams section. New tools are always in development and testing in preparation for future release.

Like all areas in the Portal, future section or feature visibility will be based on relevant product or service purchase and role authorization, but some upcoming sections include sections like User List, Teams Fax, etc.

Additional information and instructions regarding enhancements, including new tools or features, will be provided upon full release to the production environment.