



Administering Avaya Cloud Office Service Web

Issue 4
April 2024

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Chapter 1: Introduction

Purpose

- This document describes the administrative procedures you can perform on Avaya Cloud Office Service Web using Admin Portal.
- This document is intended for administrators and supervisors.

Change history

- The following changes have been made to this document since the last issue:

Issue	Date	Summary of changes
3	April 2024	Added the topic Adding external contacts to the phone system on page 47.
2	February 2024	Added the following chapters: • Company settings on page 41 • Unassigned extensions on page 65
1	December 2023	Initial issue of the document.

Chapter 2: Avaya Cloud Office Service Web administration

Avaya Cloud Office Service Web overview

Avaya Cloud Office Service Web is a browser-based management interface that serves as an administration hub for Avaya Cloud Office™. It consists of two interrelated components for performing administrative tasks: the self-administration portal named My Extension and Admin Portal.

My Extension

My Extension is a self-administration portal that all Avaya Cloud Office™ users can access to manage their extensions. On My Extension, users can configure user settings and permissions, manage devices and phone numbers, modify call handling settings, and set emergency response locations.

Admin Portal

Admin Portal is for setting up, configuring, and managing Avaya Cloud Office™. On Admin Portal, administrators and users with administration permissions can manage users and extensions, acquire new phone numbers and phones to assign them to users, create groups, configure the Auto-Receptionist, get usage and performance reports, and manage operating costs of the service.

Admin Portal overview

Admin Portal is the interface where you configure Avaya Cloud Office™ and its solutions. The configurations you make on Admin Portal are applied to desktop, mobile, and phone applications. You can access the following tabs on Admin Portal to manage Avaya Cloud Office™:

- Home: Provides quick access to the frequently used settings, links to the tutorial videos, links to integrate commonly used applications, and links to resources.
- Users: Displays all users in your organization. You can manage users, edit user permissions, create user groups, and assign templates to users.
- Phone System: Displays all phone numbers in your organization and the main settings to manage the phone system. You can assign numbers and devices to users, set up the Auto-Receptionist, and create call groups.

- Meetings: Contains meeting recordings and meeting settings. You can download the recorded meetings, manage meeting rooms, and customize all your company meetings.
- Reports: Contains pages where you can generate and download usage and performance reports. You can also access the Analytics portal from the Reports tab.
- Billing: Displays cost-related information for your account, including calling rates, billing items, device order history, and add-ons available for purchase.
- More: Contains settings and tools for customizing the company account and enhancing its security. You can also oversee the system audit trail.

Admin Portal is accessible only to the administrators and the users with administration permissions. By default, users with the following predefined user roles can access the Admin Portal:

- Super Admin
- User Admin
- Manager
- Phone System Admin
- Billing Admin

Depending on your user role, you may have limited access to certain Admin Portal tabs.

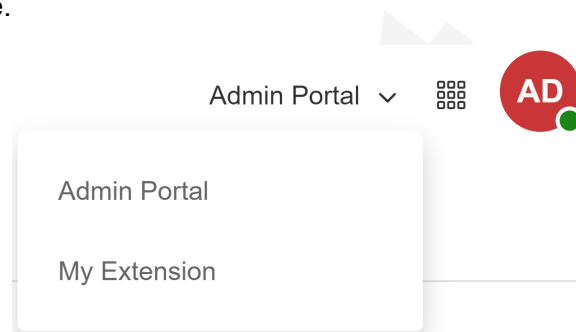
Related links

[User roles](#) on page 74

Chapter 3: Getting started

You can use various options to log in to Admin Portal. You can use your email or your Avaya Cloud Office™ phone number. You can log in with your Google credentials or use the Single Sign-on option. However, Google credential login and Single Sign-on options require prior setup.

After you log in to Admin Portal, you can switch between Admin Portal and My Extension from the top-right corner of the page.



Related links

[Logging in to Admin Portal with a Google account](#) on page 14

[Logging in to Admin Portal with Single Sign-on](#) on page 14

Logging in to Admin Portal with an email or a phone number

About this task

Log in to Admin Portal with your email address or phone number. If you log in with your phone number, Avaya Cloud Office Service Web requires you to confirm your country and enter your password.

You can also use the main phone number of the company to log in. If you enter the company phone number, Avaya Cloud Office Service Web requires you to enter your extension number.

Procedure

1. Go to [Admin Portal](#).
2. On the Sign In page, in the **Email or Phone Number** field, type your email or Avaya Cloud Office™ phone number.

3. Click **Next**.
4. If you enter your email, enter your password.
5. If you enter your Avaya Cloud Office™ phone number, confirm your country and enter your password.
6. If you enter the main telephone number of the company, confirm the country and enter your extension number and password.
7. Click **Sign In**.

Logging in to Admin Portal with a Google account

About this task

Log in to Admin Portal with your existing Google account to eliminate the need for additional login credentials.

Before you begin

To use Google login for Avaya Cloud Office™, your registered email must be a Google email address.

Procedure

1. Go to [Admin Portal](#).
2. On the Sign In page, click  Google.
The Sign in with Google page is displayed on a new browser window.
3. If you can see your Google account in the list, select your account.
4. If you cannot see your Google account in the list, do the following:
 - a. Click **Use another account**.
 - b. Type your Google email and click **Next**.
 - c. Type your Google password and click **Next**.
 - d. Click **Allow**.

Logging in to Admin Portal with Single Sign-on

About this task

Log in to Admin Portal with your organization credentials. With the Single Sign-on feature, you can access multiple applications with one set of credentials.

Before you begin

Ensure that the Single Sign-on feature is enabled from Admin Portal.

Procedure

1. Go to [Admin Portal](#).
2. On the Sign In page, click  Single Sign-on.
Avaya Cloud Office Service Web redirects you to the configured Single Sign-on page.
3. In the **Sign In** field, type your email address.
4. Click **Next**.
5. In the **Enter Password** field, type your password.
6. Click **Sign In**.

Logging out of Admin Portal

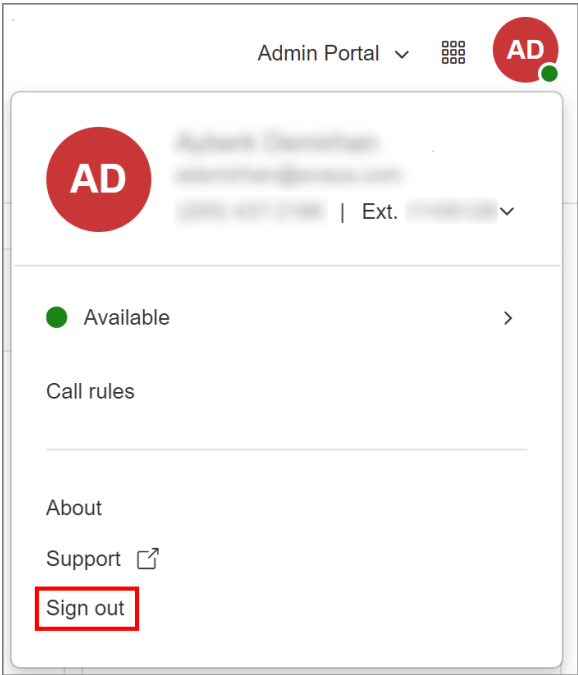
About this task

Log out of Admin Portal to terminate your session securely. If you remain inactive for approximately half an hour, Avaya Cloud Office Service Web terminates your session and redirects you to the Sign In page.

Procedure

1. At the top-right corner of the page, click your profile picture.

- 1
2. Click **Sign out**.



- 2
- 3
- Avaya Cloud Office Service Web redirects you to the Sign In page.

Chapter 4: Call queue groups

Call queue groups enable you to distribute incoming calls to a phone number or an extension among a group of users to manage the call traffic. For example, you can create a call queue for your customer support department so that multiple queue members can answer the customer calls directed to the customer support. You can distribute incoming calls among members rotationally, simultaneously, or sequentially.

For each call queue group you create, you can configure the following settings:

- Call queue details
- Direct numbers
- Greeting and hold music
- Call handling and members
- Pickup settings and members
- Voicemail and notifications

The screenshot shows the 'Call Queues' configuration page in the Avaya Cloud Office Service Web. The sidebar on the left contains navigation links: Company Info, Company Address, Caller ID Name, Directory Assistance, Phone Numbers, Auto-Receptionist, Groups, Call Queues (selected), Paging Only, Shared Lines, and Delegated Lines. The main content area is titled 'Groups » Call Queues' and includes a search bar and a '+ New Call Queue' button. Below this is a table listing existing call queues.

Status	Name	Numbers	Ext.	Msg.	Members Availability	Actions
✓	Accounting		629	0 / 0	0 / 4	⋮ ▾
⊕	Customer Care		404	0 / 0	0 / 0	⋮
✓	IT Help		661	0 / 0	0 / 1	⋮ ▾
✓	Marketing Dept		698	0 / 0	30 / 0	⋮ ▾
✗	Operations		628	0 / 0	1 / 0	⋮ ▾
⊕	Rec. Desk		655	0 / 0	16 / 0	⋮ ▾

1 Adding a call queue group

2 About this task

3 Create a call queue group to distribute incoming calls between a group of users. After you create
4 a call queue group, Avaya Cloud Office™ sends an automatic email to the call queue group
5 members and managers.

6 Procedure

- 7 1. Click **Phone System > Groups > Call Queues**.
- 8 2. Click **New Call Queue**.
- 9 Avaya Cloud Office Service Web displays the Add Call Queue window.
- 10 3. On the Add Call Queue Details tab, type a name and an extension number for the call
11 queue group.
- 12 4. If the Multi-Site feature is enabled, select the site to which you want to assign this call
13 queue.
- 14 5. **(Optional)** To copy the settings from an existing call queue group, click **Select Call Queue**
15 and select the call queue group to copy.
- 16 6. Click **Next**.
- 17 7. On the Select Managers tab, enter the PIN code required to access the call queue
18 voicemail.
- 19 8. From the list, select the users you want to appoint as the call queue group manager.
20 You can use the Search bar to find the users you want to appoint as manager.
- 21 9. Next to the manager's name, under **Permissions**, select the permissions for the manager.
22 You can click ⓘ for more information on different permission levels.
- 23 10. Click **Next**.
- 24 11. On the Select Members tab, select the call queue group members from the list.
25 You can use the Search bar to find the users you want to add.
- 26 12. Click **Done**.

27 Adding a new member to a call queue

28 About this task

29 Add or remove members from a call queue. You can control the availability of the added call
30 queue members with the following options:

- 31 • **Member Status:** To control member availability for all call queues.

- Queue Status: To control member availability for your call queue.

Avaya Cloud Office™ notifies new members with a system-generated email when they are added to a call queue.

Procedure

1. Click **Phone System > Groups > Call Queues**.
2. Click the call queue to configure.
3. Click the **Call Handling & Members** drop-down menu.
- Avaya Cloud Office™ displays the Work hours tab by default.
4. Next to Primary Members, click **+ Add Member**.
5. On the Call Queue Members window, select the members to add.
6. Click **Done**.
7. **(Optional)** Set Member Status and Queue Status switches as required.

For example, if a member is out of the office, switching off Member Status stops calls from being directed to them.

8. Click **Save**.

Configuring call queue details

About this task

You can configure or edit the general details and settings of a call queue. Under general details, you can configure details such as extension number, group name, and company name. You can also configure settings such as regional settings, schedule, and address.

Procedure

1. Click **Phone System > Groups > Call Queues**.
2. Click the call queue to configure.
3. Click the **Call Queue Details** drop-down menu.
- Avaya Cloud Office™ displays the General tab by default.
4. In the **Extension Number** field, type the extension number for the call queue.
5. In the **Group Name** field, type the name for the call queue.
6. In the **Company Name** field, type the name of the company.
7. Under Managers, click **Edit** to manage the list of managers and their access.
- Under Managers, Avaya Cloud Office™ displays the number of managers with full access.

8. Click **Change Call Queue PIN** to change the PIN used for verifying your identity when accessing call queue voicemail from a phone.
9. In the Call Queue PIN window, type the new PIN twice in the respective boxes and click **Save**.
10. Select the **Include Call Queue in Company Directory** check box to add the call queue in company contacts.
11. Under Record Group Name, click **Edit**, and in the Record Group Name window, do the following:
 - a. From the **Record by** list, select the method to acquire the group name.

The following two methods are available:

 - Avaya Cloud Office™ speech-to-text: You can spell out the group name phonetically.
 - Record group name: You can record the group name using a microphone or over a call. You can also upload a prerecorded audio file.
 - b. Click **Save**.
12. In the **Contact Phone** field, type the phone number.

This phone number is used to verify your identity if required.
13. Select the **Publish in Company Directory** check box to add this phone number to the company contacts.
14. Under Status, click **Enable** or **Disable** to change the queue status.

Under **Status**, the current status is displayed, and the other option is available for selection.
15. Under SMS Recipient, click **Edit** and select an extension that sends SMSs from the call queue number.
16. Click **Save**.

Setting up call queue details

About this task

You can set up general details such as the time zone, address, and site for the call queue. Avaya Cloud Office™ uses these details in other call queue functionality. For example, the fax cover page displays the address set in queue details in all communications with the customer.

Procedure

1. Click **Phone System > Groups > Call Queues**.
2. Click the call queue to configure.
3. Click the **Call Queue Details** drop-down menu.

Avaya Cloud Office™ displays the General tab by default.

4. Click **Settings** to display the Settings tab.

5. Under **Regional Settings**, click **Edit**.

In the Regional Settings window, select the required options from the following lists:

List title	Description
Time zone	Select the time zone for your location.
Home Country Code	Select the country code of your country.
Greetings Language	Select the language for the greeting messages.
Time Format	Select 12 h (AM/PM) or 24 h .
User Language	Select the language for your account and notification.
Regional Format	Select the country to choose the format for displaying date, time, currency, and other numbers.

6. Under **Address**, click **Edit**, and in the Address window, type parts of the address in the appropriate boxes.

7. Under **Site**, click **Edit**, and in the Select Site window, select the appropriate site.

8. Under **Schedule**, click **Edit**, select appropriate options, and set timings to set work hours for each day of the week.

9. Under **Template**, click **Apply**, and in the Select Template window, select the template type and the template.

 Note:

12 You can click **+ Template** to create a new template.

10. Under **Confirmation Message**, click **Edit** and select the duration, indicating how long the confirmation message is displayed after a successful operation.

 Note:

15 You can disable the confirmation messages by clearing the **Enable Confirmation**
16 **Message** check box.

Configuring business hours for a call queue

About this task

Set the business hours for the call queue for 24 hours, 7 days a week, or configure custom business hours. Based on the Schedule settings, Avaya Cloud Office™ handles incoming calls in the same way or differently for work and after-hours.

Procedure

1. Click **Phone System > Groups > Call Queues**.
2. Click the call queue to configure.
3. Click **Call Queue Details > Settings**.
4. Under the **Schedule** section, click **Edit**.
5. On the Schedule window, select one of the following options:
 - **24 hours, 7 days a week**: To handle incoming calls the same way continuously.
 - **Specific schedule**: To handle incoming calls differently for your work and after-hours.
6. For a specific schedule, configure the required days and times.
7. Click **Save**.

Adding a call queue direct number

About this task

Add a direct phone number for a call queue. You can add the following direct number types to call queues:

- Local number
- Toll-free number
- Vanity number

Procedure

1. Click **Phone System > Groups > Call Queues**.
2. Click the call queue to configure.
3. Click **Direct Numbers > Add Direct Number**.

Avaya Cloud Office Service Web displays the Add Direct Number window.
4. On the Select Numbers tab, from the **Location** list, select a location.
5. From the **Number Type** list, select the number type.
6. Do one of the following:
 - For a local number, select the state and area code, select the number, and click **Add Numbers**.
 - For a toll-free number, select the first three digits, select the number, and click **Add Numbers**.
 - For a vanity number, select the first three digits, type the rest of the number, and click **Search**, submit the CAPTCHA code, select the number and click **Add Numbers**.

7. Click **Next**.
 8. On the Confirm Order tab, scroll down and select that you read the terms and conditions.
 9. Click **Next**.
 10. On the Order Confirmation tab, scroll down and click **Done**.
- Avaya Cloud Office™ adds the direct phone number to the call queue.

Setting up a call queue greeting

About this task

Set a greeting message for callers connecting with an agent from your call queue. Avaya Cloud Office™ provides the default call queue greeting in the following format: Thank you for calling <CALL QUEUE NAME>. Please hold for the next available agent. However, you can create a custom call queue greeting with one of the following options:

- **Computer Microphone:** To record your message with your computer microphone. You can replay the recording before uploading.
- **Phone:** To record your message with your phone. After typing your phone number, Avaya Cloud Office™ calls you to record your custom message over the phone.
- **Importing:** To upload a .wav or .mp3 file from your computer.

* Note:

- 17 To add an after-hours message, you must set Avaya Cloud Office™ from the Call Handling &
- 18 Members drop-down menu to play an announcement during after-hours.

Procedure

1. Click **Phone System > Groups > Call Queues**.
2. Click the call queue to configure.
3. Click the **Greeting & Hold Music** drop-down menu.
Avaya Cloud Office™ displays the Work hours tab by default.
4. Under **Call Queue Greeting**, click **Edit**.
5. On the Call Queue Greeting window, under **Set Greeting**, select one of the following options:
 - **Default:** To use a default greeting message.
 - **Custom:** To add a custom greeting message.
6. To set a custom greeting, select the required option, and add your message.
7. Click **Done**.
8. **(Optional)** To set up a greeting for after-hours, click **After Hours**, and repeat steps 4 to 7.

9. Click **Save**.

Setting up a call queue audio while connecting

About this task

Set up audio that call queue callers can hear while connecting. You can select one of the following options as connecting audio:

- **Ringtones:** For callers to hear ringtones.
- **Music:** For callers to hear music. Under **Select Music**, select the required default tune.
- **Custom:** To upload a custom .wav or .mp3 file from your computer. Click **Browse** and select the required file.

Procedure

1. Click **Phone System > Groups > Call Queues**.
2. Click the call queue to configure.
3. Click the **Greeting & Hold Music** drop-down menu.
Avaya Cloud Office™ displays the Work hours tab by default.
4. Under **Audio While Connecting**, click **Edit**.
5. On the Audio While Connecting window, under **Set Audio**, select and configure the required option.
6. Click **Done**.
7. **(Optional)** To set up audio for after-hours, click **After Hours**, and repeat steps 4 to 6.
8. Click **Save**.

Setting up the music on hold for a call queue

About this task

Set up audio that call queue callers can hear while on hold. You can select one of the following options as hold music:

- **Ringtones:** For callers to hear ringtones.
- **Music:** For callers to hear music. Under **Select Music**, select the required default tune.
- **Custom:** To upload a custom .wav or .mp3 file from your computer. Click **Browse** and select the required file.

Procedure

1. Click **Phone System > Groups > Call Queues**.
2. Click the call queue to configure.
3. Click the **Greeting & Hold Music** drop-down menu.
Avaya Cloud Office™ displays the Work hours tab by default.
4. Under **Hold Music**, click **Edit**.
5. On the Hold Music window, under **Set Audio**, select and configure the required option.
6. Click **Done**.
7. **(Optional)** To set up hold music for after-hours, click **After Hours**, and repeat steps 4 to 6.
8. Click **Save**.

Setting up a call queue voicemail

About this task

Set a voicemail message for callers to listen to when sent to voicemail. Avaya Cloud Office™ provides the default call queue voicemail in the following format: All of our agents are busy helping other customers. At the tone, please record your message. When you've finished recording, you may hang up or press the # key for more options. However, you can create a custom call queue voicemail with one of the following options:

- **Computer Microphone:** To record your message with your computer microphone. You can replay the recording before uploading.
- **Phone:** To record your message with your phone. After typing your phone number, Avaya Cloud Office™ calls you to record your custom message over the phone.
- **Importing:** To upload a .wav or .mp3 file from your computer.

* Note:

- To add an after-hours message, you must set Avaya Cloud Office™ from the Call Handling & Members drop-down menu to send incoming calls to voicemail during after-hours.

Procedure

1. Click **Phone System > Groups > Call Queues**.
2. Click the call queue to configure.
3. Click the **Voicemail & Notifications** drop-down menu.
Avaya Cloud Office™ displays the Work hours tab by default.
4. Under **Voicemail greeting (work hours)**, click **Edit**.

5. On the Voicemail greeting window, under **Set Greeting**, select one of the following options:
 - **Default**: To use a default voicemail message.
 - **Custom**: To add a custom voicemail message.
6. To set a custom voicemail, select the required option, and add your message.
7. Click **Done**.
8. **(Optional)** To set up a voicemail for after-hours, click **After Hours**, and repeat steps 4 to 7.
9. Click **Save**.

Configuring call handling for a call queue group

About this task

You can configure incoming call handling for a call queue group. This involves arranging the order in which call queue members receive incoming call, adjusting the idle time between calls, and enabling or disabling members from changing their queue availability. You can select the following options for routing calls to queue members:

- **Longest idle**: To ring available members individually based on idleness.
- **Simultaneous**: To route an incoming call to up to 10 members simultaneously.
- **Fixed order**: To ring available members individually in the order set in the Primary Members list.

* Note:

- 18 Selecting **Rotating** or **Sequential** enables you to set the number of rings before Avaya Cloud Office™ moves to the next member in the queue.

Procedure

1. Click **Phone System > Groups > Call Queues**.
2. Click the call queue to configure.
3. Click the **Call Handling & Members** drop-down menu.

Avaya Cloud Office™ displays the Work hours tab by default.
4. From the **Route calls to members** list, select the required option.
5. From the **Maximum concurrent calls per agent** list, select the required option.
6. Select the **Include direct calls when calculating maximum calls** check box to consider direct calls while counting the concurrent calls.
7. From the **Number of rings before ring next member** list, select the required option.
8. From the **After call wrap-up time** list, select the required option.
9. From the **Allow members to change their queue status** list, select the required option.

10. Click **Save**.

Configuring after-hours call forwarding for a call queue

About this task

Forward after-hours calls that your call queue receives to an external number or extension.

Procedure

1. Click **Phone System > Groups > Call Queues**.
2. Click the call queue to configure.
3. Click **Call Handling & Members > After Hours**.
4. Under How to handle calls during after hours, do one of the following:
 - Select **Play an announcement** to play an announcement audio.
 - Select **Send to voicemail** to divert the call to voicemail.
 - Select **Forward to external number**, and type an external number.
 - Select **Forward to extension**, and click **Edit** to select an extension from the list.
- Forward to extension** is selected.
5. Click **Save**.

Configuring call queue wait settings

About this task

Configure call queue wait settings to set a capacity for your call queue and control how Avaya Cloud Office™ handles calls when the incoming call volume exceeds the call queue capacity. When the call queue is full, Avaya Cloud Office™ uses one of the following options to handle the incoming calls:

- **Send new callers to voicemail**
- **Advise callers of heavy call volume and disconnect**
- **Send new callers to Extension**
- **Forward new callers to an External number**

You can also set overflow groups to handle unanswered calls in your call queue.

Procedure

1. Click **Phone System > Groups > Call Queues**.

2. Click the call queue to configure.
3. Click **Call Handling & Members > Wait settings**.
4. From the **Number of callers allowed in queue** list, select the number of callers.
Ensure that the number of allowed callers equals or is below the number of call queue members.
5. From the **When queue is full** list, select the required option.
6. From the **Maximum caller wait time in queue** list, select the maximum wait time.
7. From the **When maximum wait time is reached, send caller to** list, select the required option.
8. **(Optional)** To direct unanswered calls to other call queues, do the following:
 - a. Click **Primary Members** and from the list, select **Primary and Overflow Members**.
Avaya Cloud Office™ displays the Overflow Group section with a list of all the available call queues.
 - b. From the list, enable the check boxes of up to three call queues.
9. Click **Save**.

Configuring call queue notifications

About this task

Manage the notifications Avaya Cloud Office™ sends to managers and specified emails. You can select email, SMS, or both for notifications about the following:

- Voicemail Messages
- Received Faxes
- Missed Calls
- Received Text Messages

Procedure

1. Click **Phone System > Groups > Call Queues**.
2. Click the call queue to configure.
3. Click **Voicemail & Notifications > Settings**.
4. Under Notifications, click **Edit**.

5. On the Notifications window, select or clear the check boxes as required.

Notifications		
	By Email	By SMS
Voicemail Messages	☒	☐
Received Faxes	☒	☐
Missed Calls	☐	☐
Received Text Messages	☒	☐
☒ Include Voicemail Message in Email ☒ Include Received Fax in Email		

6. Under Send Notifications to, select one of the following:

- **Managers and Specified Emails**
- **Specified Emails Only**

7. In the **Email** field, type the email of the recipient.

8. Select the carrier, and type the phone number.

If your carrier is not listed, contact your carrier to learn the email address by which you can receive text messages, and enter it into the **Phone Number** field.

For example, yournumber@yourcarrier.com.

9. To add the member to the recipients list, click **Add**.

10. **(Optional)** To add more members to the recipients list, repeat steps 7 to 9.

11. Click **Save**.

Deleting a call queue group

About this task

Delete a call queue group to permanently remove this group from Avaya Cloud Office™. To delete a call queue group, you must first disable it.

* Note:

- After you delete a call queue group, Avaya Cloud Office™ also deletes reports, greetings, rules, and recorded calls of this call queue group.

Procedure

1. Click **Phone System > Groups > Call Queues**.
2. Next to the call queue group to delete, click ⋮.

3. Click **Disable**.
4. In the Disable Call Queue window, click **Disable**.
5. Next to the call queue group to delete, click **:**.
6. Click **Delete**.
7. In the Delete Call Queue window, click **Delete**.

Adding an overflow call group

About this task

Add an available call queue as an overflow call group to reduce the wait time for the callers by assigning the unanswered calls to the agents from the overflow group. When the agents from the queue are available but do not answer the call, Avaya Cloud Office™ transfers the call to the overflow call group.

Procedure

1. Click **Phone System > Groups > Call Queues**.
2. Click the call queue to configure.
3. Click **Call Handling & Members > Wait settings**.
4. From the **When maximum wait time is reached, send caller to** list, select the required option.
5. **(Optional)** To direct unanswered calls to other call queues, do the following:
 - a. Click **Primary Members** and from the list, select **Primary and Overflow Members**.
Avaya Cloud Office™ displays the Overflow Group section with a list of all the available call queues.
 - b. From the list, enable the check boxes of up to three call queues.
6. Click **Save**.

Call queue pickup groups

This topic provides an overview of the call queue pickup group.

Using the call queue pickup feature, the administrators can specify an alternate group of agents to answer calls when the primary agents of a call queue are unavailable. Pickup group members receive call notifications when callers wait on hold 'in-queue' for more than the configured alert time.

1 Setting up a Call Pickup group for a call queue

2 About this task

3 You can set up call queue pickup groups to specify a group of agents to answer queued calls
4 when the primary agents are busy. If a call rings longer than the configured wait time, the agents
5 from the call queue pickup group can answer the call.

6 Procedure

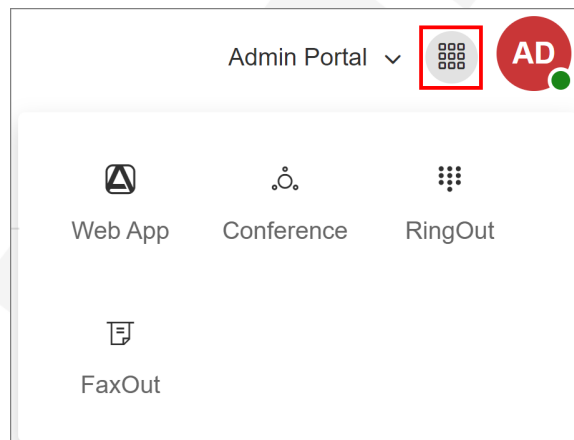
- 7 1. Click **Phone System > Groups > Call Queues**.
- 8 2. Click the call queue to configure.
- 9 3. Click the **Pickup Settings & Members** drop-down menu.
- 10 4. Click **+ Add Pickup Member**.
- 11 5. Select pickup group members using **Search**, **Call Queue**, and **Department** fields.
- 12 6. Check the box next to the members you want to add.
- 13 7. In the **Call Queue Pickup Phone Key** window, select if you want to add the group pickup
14 key to phones of the selected members automatically or manually.
 - 15 • **Yes**: The phone key is added to the members' phones automatically.
 - 16 • **No**: The phone key is added to the members' phones manually.
- 17 The feature key is added to members' next configurable Presence line.
- 18 8. Click **Done**.

Chapter 5: Admin Portal navigation

Avaya Cloud Office Service Web directs you to the homepage after logging in to Admin Portal. You can navigate through other tabs of Admin Portal to manage Avaya Cloud Office™ and access different features.

From the top-right corner of the page, you can also access the following Avaya Cloud Office Service Web features:

- Web App: The web version of the Avaya Cloud Office Desktop App.
- Conference: The widget to plan conference calls.
- RingOut: The widget to make outbound calls.
- FaxOut: The widget to send faxes.



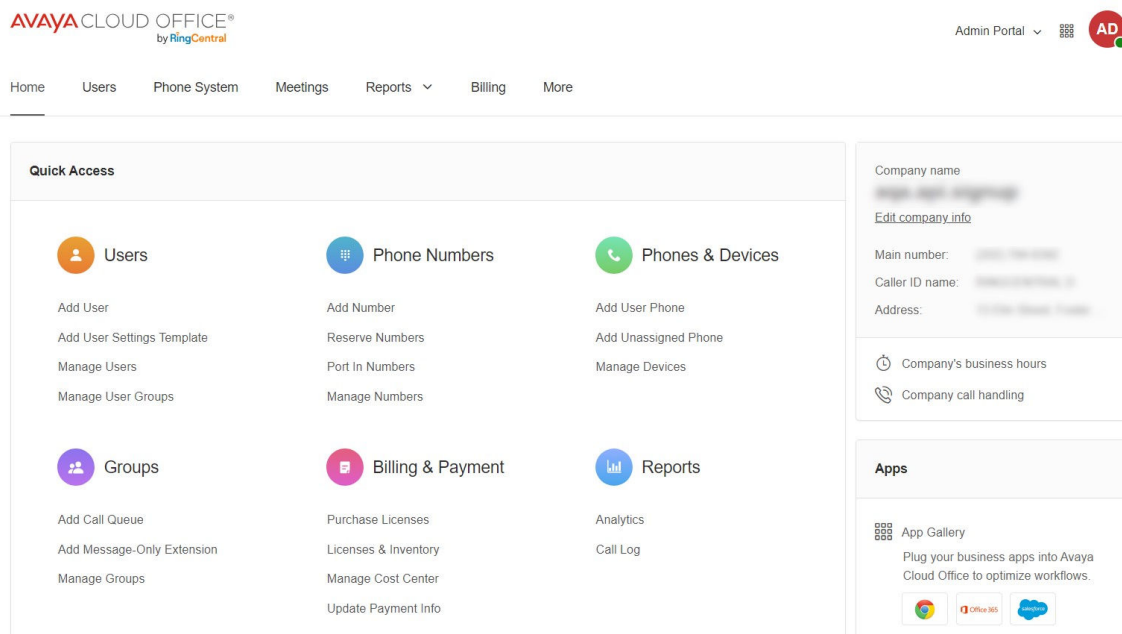
Related links

- [Home tab](#) on page 33
- [Users tab](#) on page 33
- [Phone System tab](#) on page 34
- [Meetings tab](#) on page 35
- [Reports tab](#) on page 36
- [Billing tab](#) on page 38
- [More tab](#) on page 39

1 Home tab

2 The Home tab displays the Admin Portal homepage. From the Home tab, you can access the
3 following sections:

- 4 • Quick Access: Displays the frequently used settings.
- 5 • Tutorials: Displays the tutorial videos for common administrative tasks.
- 6 • Apps: Provides quick access to the App Gallery, Developer Portal, and links to integrate
7 Google, Office 365, and Salesforce.
- 8 • Resources: Provides quick access to Avaya OneCare Portal and Service Status pages.



10 Users tab

11 The Users tab displays all users in your organization. From the Users tab, you can manage users,
12 edit user permissions, and assign templates to users. From the left menu, you can access the
13 following subtabs:

- 14 • User List: Displays a list of users with extensions and a list of unassigned extensions. You
15 can click an entry in either of these lists to see more details and settings.
- 16 • Roles: Displays a list of roles that you can assign to users.
- 17 • User Groups: Displays a list of created user groups.
- 18 • Templates: Displays the templates that you can assign to users.

AVAYA CLOUD OFFICE®
by RingCentral

Admin Portal

Home Users Phone System Meetings Reports Billing More

User List

Users with Extensions

Unassigned Extensions

Roles

User Groups

Templates

User List » Users with Extensions

Search

+ Add User Add Users in Bulk

Delete Enable Disable Send Invite Set Credentials Apply Templates Change Site

	Status	Name	Number	Ext.	Licenses	Roles	Department	Site	Msg.
☐	✓	[Name]	[Number]	[Ext.]	Office	Super Admin	Company		35 / 35
☐	✓	[Name]	[Number]	[Ext.]	Office	Super Admin	Company		0 / 1
☐	✓	[Name]	[Number]	[Ext.]	Office	Standard (1...	Company		7 / 7
☐	✓	[Name]	[Number]	[Ext.]	Office	User Admin	Company		9 / 10
☐	✓	[Name]	[Number]	[Ext.]	Office	User Admin	Company		6 / 7
☐	✓	[Name]	[Number]	[Ext.]	Office	Super Admin	Company		34 / 34

1

2 Phone System tab

3 The Phone System tab displays all the phone numbers in your organization and the main settings
 4 to manage the phone system. On the Phone System tab, you can assign numbers and devices to
 5 users, set up the Auto-Receptionist, and create call handling groups. From the left menu, you can
 6 access the following subtabs:

- 7 • Company Info: Displays the company address, caller ID name, and directory assistance.
- 8 • Phone Numbers: Displays all the numbers, numbers in use, number inventory, number port in
 9 orders, and number requests.
- 10 • Enhanced Business SMS: Displays information on the process for 10DLC TCR registration.
- 11 • Auto-Receptionist: Displays the general settings for the Auto-Receptionist, dial-by-name
 12 directory, IVR menu, IVR editor, and prompt recordings library.
- 13 • Groups: Displays the call groups, such as call queues, delegated lines, and call monitoring
 14 groups.
- 15 • Phones & Devices: Displays the lists of user phones, common area phones, paging devices,
 16 shared lines, and unassigned devices.
- 17 • Emergency Calling: Displays the 911 notifications, emergency response locations, and
 18 configurations for setting up automatic location updates.

AVAYA CLOUD OFFICE®
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Admin Portal

Home Users Phone System Meetings Reports Billing More

Company Info

Phone Numbers >

Enhanced Business SMS >

Auto-Receptionist >

Groups >

Phones & Devices >

Emergency Calling >

Search

+ New Site

Ext.	Site
	Main Site

Company Address Caller ID Name Directory Assistance

Company Address information will be used for publishing to Directory Listing if this service is available for your account.

Company Name

City

Company Address

State/Province

Zip Code

1

2 Meetings tab

3 The Meetings tab contains meeting recordings and meeting settings. On the Meetings tab, you
 4 can download the recorded meetings, manage meeting rooms, and customize all your company
 5 meetings. From the left menu, you can access the following subtabs:

- 6 • Recording Management: Displays all the recorded meetings in your company. You can
 7 download or delete a recording.
- 8 • Rooms: Displays the added rooms, synchronized calendars, and room templates.
- 9 • Meetings Settings: Displays the settings for all your company meetings, such as enabling a
 10 waiting room, a chat, and meeting recording.

AVAYA CLOUD OFFICE®
by RingCentral

Admin Portal

AD

Home

Users

Phone System

Meetings

Reports

Billing

More

Recording Management

Rooms

Meetings Settings

Recording Management » Meetings

Host	Topic	ID	Start Time	Actions
	Avaya Cloud Office Video me...		01/17/2023 8:28 AM	
	Avaya Cloud Office Video me...		01/17/2023 7:47 AM	
	Avaya Cloud Office Video me...		12/28/2022 8:11 AM	
	Avaya Cloud Office Video me...		12/15/2022 7:56 AM	

Reports tab

The Reports tab functions as a drop-down list from which you can access to the Call Log page, the SMS Log page, and the Analytics portal. You can generate various types of reports from these pages and set up an automated system to deliver reports to selected contacts.

Related links

- [Call Log page](#) on page 36
- [SMS Log page](#) on page 37
- [Analytics portal](#) on page 37

Call Log page

The Call Log page provides customized reports on calls and faxes to the company phone numbers and extensions. On the Call Log page, you can generate and download reports. You can also apply filters to customize your reports.

You can download the reports in .csv format or set the delivery settings to send reports to an email address. You can also receive automated reports on a daily, weekly, or monthly basis. Call recording can also be downloaded in .mp3 format.

Simple Detailed

Search Last 7 days

< Page 1 >

☐	Type	Phone Number	Name	Date / Time	Recording	Action	Result	Length
☐	☎	From: [redacted] ... ☎	[redacted]	11/08/2023 7:16 PM	-	Phone Call	Missed	0:00:07
☐	☎	From: [redacted] ... ☎	[redacted]	11/08/2023 5:54 PM	-	Phone Call	Rejected	0:00:05
☐	☎	From: [redacted] ... ☎	[redacted]	11/08/2023 5:26 PM	-	Phone Call	Missed	0:00:07
☐	☎	From: [redacted] ... ☎	[redacted]	11/08/2023 5:22 PM	-	Phone Call	Rejected	0:00:05
☐	☎	From: [redacted] ... ☎	[redacted]	11/08/2023 3:11 PM	-	Phone Call	Rejected	0:00:05
☐	☎	From: [redacted] ... ☎	[redacted]	11/08/2023 1:24 PM	-	Phone Call	Rejected	0:00:05

1

2 SMS Log page

3 The SMS Log page provides customized reports on text messages to the company phone
 4 numbers and extensions. On the SMS Log page, you can generate and download reports in .CSV
 5 format. You can also apply filters to customize your reports.

6 Analytics portal

7 The Analytics portal, or Avaya Cloud Office Analytics and Reporting, provides detailed company
 8 reports for a specified period. From the Analytics portal, you can access the following reports:

- 9 • Adoption & Usage: Displays the user activity, including messages, meetings, and calls usage.
- 10 • Company Numbers: Displays the company numbers usage and call length.
- 11 • Performance Reports: Displays the queues, users, calls, and meetings activity.
- 12 • Quality of Service: Displays the statistics for the selected extension, calls, MOS performance,
 13 and meetings.
- 14 • Rooms and devices: Displays the statistics for meeting rooms and devices.

15 You can download any report in .xlsx or .pdf formats or save and email the report to a user.
 16 You can also create a subscription to automatically deliver reports to your email address. You can
 17 receive reports daily, weekly, or monthly.

1 Billing tab

2 The Billing tab displays information about your account. On the Billing tab, you can view calling
 3 rates, billing items on the account, and the history of device orders. You can also purchase
 4 add-ons. From the left menu, you can access the following subtabs:

- 5 • Billing: Displays the billing information, including overview, details, history, and the payment
 6 method.
- 7 • Licenses & Inventory: Displays all the licenses and phones on the account.
- 8 • Usage: Displays the current plan usage and calling credits information.
- 9 • Calling Rates: Displays all the outbound, inbound, and premium calling rates.
- 10 • Purchase: Displays the add-ons to purchase, such as licenses, phone numbers, and phones.
- 11 • Meetings: Displays the meeting licenses, large meeting licenses, room licenses, and room
 12 connector licenses.
- 13 • Live Reports: Displays the live report licenses.
- 14 • Push to Talk: Displays the push to talk licenses.
- 15 • Device Orders: Displays the phone orders for a specified period.
- 16 • Cost Center Management: Displays the cost centers and billing items information.

The screenshot shows the Avaya Cloud Office Admin Portal interface. At the top, the header includes the Avaya Cloud Office logo, the text "by RingCentral", and navigation links for "Admin Portal", a settings icon, and a user profile icon labeled "AD". Below the header is a main navigation bar with links: Home, Users, Phone System, Meetings, Reports (with a dropdown arrow), Billing (highlighted), and More.

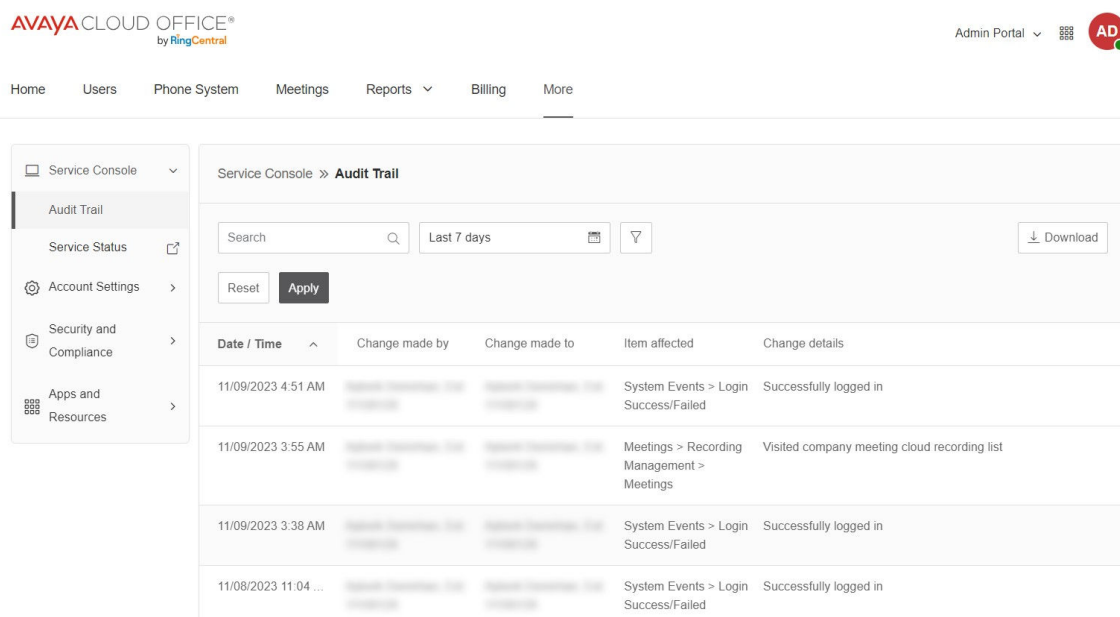
The Billing tab is active, and the "Overview" subtab is selected. On the left is a sidebar menu with the following items: Billing (selected), Overview, Service Billing Detail, Billing History, Payment Method, Licenses & Inventory, Usage, Calling Rates, Purchase, Meetings, Push to Talk, Device Orders, and Cost Center Management.

The main content area is titled "Billing » Overview" and displays the following information:

- Your Plan:** Avaya Cloud Office Ultimate. Status: Active. Billing Cycle: 11/09/2023 - 12/08/2023. Billing Plan: Monthly. Buttons: Change, Cancel.
- General Usage:** Current Plan Usage: 0 minutes / Unlimited. Paid SMS Usage: View Log. Mobile Users: View History. View All Usage Detail.
- Credits:** Available Account Credits: \$0.00. Pending Credit: \$0.00. Free Service Credit: \$0.00.
- Services:** View Details. Monthly Charges: [blurred]. Next Billing Date: [blurred].
- Auto-Purchase:** Calling Credit Package: \$20.00 (equivalent to 513 Plan minutes at 4¢). Cost Center: [blurred]. Change.
- Payment Method:** Update. Payment Type: Credit Card. Card Number: [blurred]. Card Type: [blurred]. Expiration Date: [blurred]. View Detail.
- Upcoming Charges:** \$12,874.00 (Fees and Taxes excluded). Billing Date: 12/09/2023.

More tab

The More tab contains the latest tools and settings for making global changes and configurations that impact the entire solution. The More tab is accessible only to Super Admins.



Related links

- [Service Console subtab](#) on page 39
- [Account Settings subtab](#) on page 39
- [Security and Compliance subtab](#) on page 40
- [Apps and Resources subtab](#) on page 40

Service Console subtab

Service Console contains the following sections:

- **Audit Trail:** Displays the changes that the company users make in the Avaya Cloud Office™ system. You can search for a change and download a filtered list of changes.
- **Service Status:** Displays any high-level issues that impact the services on Avaya Cloud Office™ for every region and feature. Avaya Cloud Office™ notifies the administrators and users about service-impacting issues by email and SMS.

Account Settings subtab

Account Settings contains the following sections:

- **Appearance:** Displays the settings to modify the company logotype, profile number, and automatic Avaya Cloud Office™ email notifications.
- **Archiver Settings:** Displays the settings to enable archiver for super administrators, managers, and users.

- Directory Integration: Displays the settings to automatically provision users from your corporate directory to Avaya Cloud Office™.
- Headset Support: Displays the settings for the supported headsets.
- Microsoft Teams: Displays the settings to synchronize the presence statuses in Avaya Cloud Office™ with Microsoft Teams. Here, you can also configure Avaya Cloud Office™ as an embedded app in Microsoft Teams.
- Multi-Site Settings: Displays the settings to enable account support for multiple sites.
- General Settings: Displays the settings to enable or disable access to the SMS service for the account.
- Extension Numbering: Displays the settings to customize the numbering on extensions.

Security and Compliance subtab

Security and Compliance contains the following sections:

- Single Sign-on: Displays the settings for configuring Single Sign-on.
- Session Timeout: Displays the settings for configuring session timeout for users.
- Hot Desk Session Timeout: Displays the settings for configuring session timeout for hot desk users.
- Mobile App Security: Displays the security settings for the mobile application.
- Masked Numbers: Displays the settings for activating masked numbers.

Apps and Resources subtab

Apps and Resources contains the following sections:

- Archiver: Displays a list of third-party storage to securely save messages and recorded calls. You can back up call recordings, voice mails, SMS, and fax hourly. To start data backup, connect to the required storage and enable backup. The Archiver saves the data hourly, starting from the hour before the backup process begins.
- App Gallery: Displays the applications that you can integrate into Avaya Cloud Office™.
- Developer Portal: Displays the tools and services for building, deploying, and managing custom integrations using RingCentral APIs.

Chapter 6: Company settings

You can configure how your company is represented in Avaya Cloud Office™. For example, you can change the company logo, configure the company caller ID name, or modify the welcome email sent to new users.

You can also change company details such as the company address and publish these details on directory assistance to increase company visibility and accessibility for potential customers.

Avaya Cloud Office™ also supports Single Sign-on, which enables users to log in to their accounts with your organization credentials. Additionally, you can add emergency response locations of your company so that first responders can locate it from the emergency calls made.

Changing the company details

About this task

Change the company details, such as the company name and address. If the Multi-site feature is enabled on your company account, you can also change the address details of individual sites.

Procedure

1. From the Admin Portal homepage, click **Phone System > Company Info**.

If you enable the Multi-site feature of your company account, you will see a list of your sites in the middle pane. Otherwise, Avaya Cloud Office Service Web displays the Company Address tab.

2. If you have multiple sites, on the middle pane, select the site to configure.
3. On the Company Address tab, edit or complete the following fields:

- **Company Name**
- **Company Address**
- **City**
- **State/Province**
- **Zip Code**

4. Click **Save**.

1 Configuring the company caller ID name

2 About this task

3 Assign a caller ID name so that the person receiving your call can see your company name on the
4 screen of their device. Updates to your caller ID name can take up to 72 hours.

! Important:

- 5 The person receiving your call can see your company name only if they have an active caller
- 6 ID service from their provider.

7 Procedure

- 8 1. From the Admin Portal homepage, click **Phone System > Company Info**.

9 If you enable the Multi-site feature of your company account, you will see a list of your sites
10 in the middle pane. Otherwise, Avaya Cloud Office Service Web displays the Company
11 Address tab.

- 12 2. If you have multiple sites, on the middle pane, select the site to configure.

- 13 3. Click the **Caller ID Name** tab.

- 14 4. Select **Use a custom caller ID name** and enter your custom caller ID name.

15 Your caller ID name can consist of a combination of up to 15 alphanumeric characters and
16 commas.

- 17 5. Click **Save and Publish**.

18 Publishing company details on directory assistance

19 About this task

20 Publish your company name, phone number, and address to make them public on directory
21 assistance services. Directory assistance is a phone service provided by telecommunications
22 companies or other independent providers to help users find phone numbers and addresses of
23 specific businesses and governmental entities.

24 Procedure

- 25 1. From the Admin Portal homepage, click **Phone System > Company Info**.

26 If you enable the Multi-site feature of your company account, you will see a list of your sites
27 in the middle pane. Otherwise, Avaya Cloud Office Service Web displays the Company
28 Address tab.

- 29 2. If you have multiple sites, on the middle pane, select the site to configure.

- 30 3. Click the **Directory Assistance** tab.

- 31 4. Select or clear the **I don't want my fax number listed** check box.

5. Complete the following fields:

- **Company Name**

- **Main Site Name**

Avaya Cloud Office Service Web displays this field only if the Multi-site feature is enabled.

- **City**

- **Company Address**

- **State/Province**

- **Zip Code**

- **Email**

6. Click **Next**.

7. Select the check box to agree to the terms of service.

8. Click **Publish**.

Adding a company site

About this task

Enable the Multi-site feature and add new sites to your company account to manage multiple company locations with a single Avaya Cloud Office™ account. You can then move your existing users, phone numbers, and phones between your sites or add new ones to your newly created sites.

Important:

The Multi-site feature is only available on Premium and Ultimate subscription plans.

Procedure

1. From the Admin Portal homepage, click **More > Account Settings > Multi-Site Settings**.

2. Toggle on the **Enable account support for multiple sites** switch.

3. Click **Phone System > Company Info**.

4. At the top corner, click **New Site**.

Avaya Cloud Office Service Web displays the New Site window.

5. On the Site Info tab, in the **Site Name** field, enter a name for the site.

6. **(Optional)** To change the extension number automatically assigned for the site, in the **Site Extension** field, edit the number.

7. From the **Site Address** list, select an already saved address or click **New** to create a new address entry.

8. **(Optional)** To copy the business hours and regional settings of an existing site:
 - a. Under Copy Settings from, click **Select Site**.
 - b. On the Select Site window, select the site to copy the settings from.
 - c. Click **Copy**.
9. If cost centers are enabled on your company account, from the **Cost Center Code** list, select a cost center.
10. Click **Next**.
11. On the Site Settings tab, configure the regional settings and the business hours and click **Next**.
12. **(Optional)** On the Number(s) tab, assign new or existing phone numbers to the site and click **Next**.
13. **(Optional)** To set a caller ID name different from the one set for the main site, on the Caller ID Name tab, select **Use a custom caller ID name** and type an outbound caller ID name in the blank field.
14. Click **Next**.
15. To determine where Avaya Cloud Office™ routes the callers when they call this site, on the Site Call Handling tab, select an extension type.

For example, to direct callers to a message-only extension, you must select **Voicemail**.
16. Next to the extension type you selected, select an existing extension of that type or create a new one.

On the **New Site** window, you can only create new extensions for the **IVR menu**, **Voicemail**, and **Announcement** options.
17. Click **Next**.
18. Click **Done**.

Adding an emergency response location

About this task

Add emergency response locations for your company locations so that first responders receive the address information for emergency calls made from your company locations.

Procedure

1. On the main page, click **Phone System > Emergency Calling > Company Emergency Response Locations**.
2. Click **Add**.

Avaya Cloud Office Service Web displays the Add Emergency Response Location window.

3. In the **Nickname** field, type a name for the location.
4. If the Multi-site feature is enabled, from the **Site** list, select the company site.
5. Under Emergency Address, click **Edit**.
Avaya Cloud Office™ displays the Edit Address window.
6. **(Optional)** To use an address already saved on Avaya Cloud Office™, from the **Copy Address Values from** list, select the address.
7. To enter a new address, complete the following fields:
 - **Customer Name**
You can type your name in this field to let others know that you added this particular emergency response location.
 - **Country**
 - **Street Address**
 - **Additional Address (Optional)**
You can use this field to provide more detailed address information.
 - **City**
 - **State/Province**
 - **Zip Code**
8. Click **Done**.
9. Click **Add**.

Related links

[Configuring emergency response location settings for a phone](#) on page 98

Changing the company logo

About this task

Upload an image to change the company logo. The image you upload:

- Must be in JPEG, GIF, or PNG formats.
- Cannot exceed 800 x 12 pixels in dimension.
- Cannot exceed 600 KB in size.

Procedure

1. From the Admin Portal homepage, click **More > Account Settings > Appearance**.
Avaya Cloud Office Service Web displays the Company Logo tab.
2. Click **Browse**.

3. Select and upload the new company logo.
4. Click **Save**.

Configuring the welcome email for new users

About this task

Customize the welcome email that Avaya Cloud Office™ sends to new users to add the following:

- An image, which can be up to 350 x 60 pixels in dimension
- A message limited to 750-characters
- A contact email address for support
- A phone number for support
- A webpage link for support

! Important:

- 11 Welcome email configuration is only available on Premium or Ultimate subscription plans.

Procedure

1. From the Admin Portal homepage, click **More > Account Settings > Appearance**.

Avaya Cloud Office Service Web displays the Company Logo tab.

2. Click the **Email Notifications** tab.

Avaya Cloud Office Service Web provides a preview of the default welcome email.

3. **(Optional)** To change the language, do the following:

From the **Language** list, select the language and click **Update Preview**.

Avaya Cloud Office Service Web translates the email into the selected language.

4. In the Customize Email Notifications section, update the following fields:

- **Custom Logo:** Enter an image URL to add a custom logo to your email header. The image dimensions cannot exceed 350 x 60 pixels.
- **Message:** Add up to 750-characters long custom message to the footnote of the email.
- **Contact Email:** Add a support email address to the footnote of the email.
- **Support Contact Phone Number:** Add a support phone number to the footnote of the email.
- **Support Website:** Add a webpage URL to the footnote of the email.

5. In the Customize Welcome Email section, select or clear the following check boxes:

- **Include main company number**

- Include direct number
 - Include Avaya Cloud Office Support Center information
6. (Optional) To view your customized email, scroll down and click **Update Preview**.
 7. Click **Save**.

Adding external contacts to the phone system

About this task

Connect external phone systems to your Avaya Cloud Office™ phone system with Cloud Connector directory integration so that users can call external contacts. For example, you can integrate Avaya Cloud Office™ with Avaya Experience Platform™ to enable Avaya Cloud Office™ users to call Avaya Experience Platform™ agents.

The integration requires uploading a `.csv` file with the external contact data, such as first name, last name, email, extension number, and phone number. If you do not have a `.csv` file, you can download a `.csv` file template from Admin Portal and complete its fields following the instructions. Then, upload this `.csv` file to Admin Portal to add these external contacts to your phone system.

If you have a `.csv` file exported from the external phone system, you can upload it directly to Admin Portal, granted it has the following columns in this order:

- FirstName
- LastName
- Email
- ExtensionNumber
- DirectNumber

If the `.csv` file exported from the external phone system does not follow the same structure, you can modify its columns to make it compatible.

Before you begin

Contact Avaya Support to enable Cloud Connector for your account.

Procedure

1. From the Admin Portal homepage, click **More > Account Settings > Directory Integration > Cloud Connector Directories**.
2. Select the Cloud Connector directory to use and click **Bulk add or delete contacts**.
Avaya Cloud Office Service Web displays the Bulk add or delete contacts window.
3. To obtain the `.csv` file template, do one of the following:
 - To receive the template in your email, in the **Send Email to** field, type your email and click **Send**.

- To download the template to your computer, click **Download**.
 - 4. Open and prepare the .csv file.
 - 5. To upload the .csv file to Avaya Cloud Office Service Web, on the Bulk add or delete contacts window, click **Browse**.
 - 6. Select the .csv file from the file browser and click **Open**.
 - 7. Click **Upload**.
- Avaya Cloud Office Service Web displays a confirmation window stating that you will receive a notification email after the upload process is complete.
- 8. **(Optional)** To send the notification email to other users, in the **Additional notification recipients** field, type one or more emails separated by commas.
 - 9. Click **Submit**.

Next steps

Log in to the desktop, mobile, or web application and navigate to the Contacts tab to check if the external contacts are added. You can spot the external contacts by the  icon next to their username.

Enabling Single Sign-on

About this task

Enable Single Sign-on (SSO) to allow users to access Avaya Cloud Office™ applications with your organization credentials. You can set up SSO yourself or contact Avaya Cloud Office™ customer support to set it up for you.

In both cases, you must obtain your identity provider (IDP) metadata, get your service provider (SP) metadata, and import the SP metadata into your federation server when enabling SSO.

Important:

- 23 Your identity provider must support SAML 2.0 for a successful SSO implementation.

Before you begin

- Ensure that your identity provider supports SAML 2.0.
- Obtain the IDP metadata from your identity provider. You can contact the customer support of your identity provider to obtain it.

Procedure

1. From the Admin Portal homepage, click **More > Security and Compliance > Single Sign-on**.
2. In the SSO Configuration area, in the Set up SSO by yourself section, click **Set Up**.
Avaya Cloud Office Service Web displays the Set up Single Sign-on window.

3. In the Upload IDP metadata section, upload the metadata you obtained from your identity provider with one of the following methods:
 - From the **Upload Metadata by** list, select **Upload with file**, click **Browse** and select the metadata file.
 - From the **Upload Metadata by** list, select **URL**, enter your metadata URL in the blank field and click **Import**.
4. In the Attribute Mapping section, select email attributes to use in your metadata.

If Avaya Cloud Office Service Web cannot recognize the email attribute, you can select **Custom** and type the attribute name.
5. In the Certificate Management section, click **Upload** and select the certificate file.
6. Click **Save**.

Avaya Cloud Office Service Web returns you to the Single Sign-on page.
7. To get your SP metadata, in the Set up SSO by yourself section, click **Download**.
8. Import your SP metadata to your federation server and configure the federation server.

Federation server configuration can differ depending on the platform you use. However, when your federation server requests your audience URI and SP entity ID, you must enter:
`https://sso.ringcentral.com`
9. After the federation server configuration, return to Admin Portal and navigate back to **More > Security and Compliance > Single Sign-on**.
10. In the Enable SSO section, select the **Enable SSO Service** check box.
11. Click **Save**.

Chapter 7: User management

As an administrator, you can use Admin Portal to manage Avaya Cloud Office™ users. In Avaya Cloud Office™, each user is assigned a unique extension number. You manage users by managing their extensions.

On the Users tab, you can view the users with extensions, add new users with or without phones, configure their extension settings, upgrade or downgrade their licenses, and disable or permanently delete users. You can customize the columns on the Users with Extensions list, filter the list, and download it in .xlsx format.

From the User Groups subtab, you can create user groups and assign managers to these groups. Group managers can modify group settings and monitor the call logs of group members.

Related links

[User settings](#) on page 60

[User groups](#) on page 62

[User roles](#) on page 74

Adding users with phones

About this task

Add up to 25 new users with phones or office users to Avaya Cloud Office™. Unlike mobile users, office users are assigned phone numbers and phones, including softphones.

You can choose from your unassigned phones, place an order to purchase a new phone, or use an existing SIP phone. You can also assign Avaya Cloud Office Phone App users for softphone capabilities.

! Important:

- Additional charges apply if there is no available license in your company account. You can view the number of available licenses while adding office users.

Procedure

1. From the Admin Portal homepage, navigate to **Users > User List > Users with Extensions**.
2. At the top-right corner of the list, click **Add User**.

Avaya Cloud Office Service Web displays the Add Users window.

3. In the Office User section, select a location from the list and click **Select**.

By default, the user's location corresponds to the home country of the company account.

4. In the corresponding fields, enter the user's email, first name, and last name.

5. Select a cost center and a site, if applicable.

6. **(Optional)** In the **Ext.** field, edit the extension number.

7. Click the **Phone** list and do one of the following:

- To assign Avaya Cloud Office Phone App, click **Avaya Cloud Phone Desktop App**.
- To select a phone from the unassigned devices, click **Inventory phone**, select a phone, and click **Done**.
- To acquire a new phone, click **Purchase phone**, select a phone to purchase, and click **Select**.
- To assign an existing SIP phone, click **Bring your own device**.

8. Click the **Number** list and do one of the following:

- To select an unassigned phone number from the inventory, on the Number Inventory tab, select a phone number, and click **Done**.
- To acquire a new phone number, on the New Numbers tab, select a location and an area code, select a phone number, and click **Done**.

9. **(Optional)** To add more users, click **+ Add** and repeat the steps 4 to 8.

10. Click **Next**.

11. In the Setup Option section, select one of the following options:

- **Send invite:** To send a welcome email to each user with an activation link.
- **Activate by assigning credentials:** To assign credentials to the user.

You must create a password, a PIN, and a security question, and an answer for each user. Users do not receive a welcome email.

- **Activate later:** To set up users now, but activate them later.

Users do not receive a welcome email.

12. To edit the user's role, under the Assigned Role section, click **Edit Role**.

Avaya Cloud Office Service Web assigns the Standard (International) role to every user by default.

13. Click **Submit**.

Related links

[User roles](#) on page 74

[Number inventory overview](#) on page 83

Adding users without phones

About this task

Add up to 25 new users without phones or mobile users to Avaya Cloud Office™. Mobile users have extensions and can use limited phone functionality but do not have phones or phone numbers.

Mobile users can make or receive up to 10 external calls without additional charges. If a user makes or receives more than 10 external calls, Avaya Cloud Office™ charges the user for an office user license for that month. Avaya Cloud Office™ resets the 10-call limit every month.

* Note:

- For instructions on adding users without physical phones but with softphone capabilities, see *Adding users with phones*.

Procedure

1. From the Admin Portal homepage, navigate to **Users > User List > Users with Extensions**.

2. At the top-right corner of the list, click **Add User**.

Avaya Cloud Office Service Web displays the Add Users window.

3. In the Mobile User section, click **Select**.

4. In the corresponding fields, enter the user's email, first name, and last name.

5. Select a cost center and a site if applicable.

6. **(Optional)** In the **Ext.** field, edit the extension number.

7. **(Optional)** To add more users, click **+ Add** and repeat the steps 4 to 6.

8. Click **Next**.

9. In the Setup Option section, select one of the following options:

- **Send invite:** To set up a user by sending a welcome email with an activation link.
- **Activate by assigning credentials:** To set up a user by assigning credentials. You must create a password, a PIN, a security question, and an answer for each user. Users do not receive a welcome email.
- **Activate later:** To set up a user now, but activate them later. Users do not receive a welcome email.

10. To edit the user's role, in the **Assigned Role** section, click **Edit Role**.

Avaya Cloud Office Service Web assigns the Standard (International) role to every user by default.

11. Click **Submit**.

Related links

[User roles](#) on page 74

[Adding users with phones](#) on page 50

1 Adding users in bulk

2 About this task

3 Add up to 5000 users simultaneously. When bulk-adding users, you must first download a
4 template in .xlsx or .xls formats from Avaya Cloud Office Service Web. Then, complete the
5 required fields following the instructions, and upload the template back to Avaya Cloud Office
6 Service Web.

7 You can customize the template to fit your organizational needs before downloading it. If you do
8 not add the optional Roles column to your template, users are assigned the default role, which is
9 the Standard (International) role.

10 The types of users you can add in bulk are as follows:

- 11 • Users without a device
- 12 • Users with an extension and a softphone
- 13 • Users with an extension and a deskphone
- 14 • Users with an extension and an existing device

15 Before you begin

- 16 • If you plan to add users with phones or softphones, ensure that you have unassigned phone
17 numbers in your inventory.
- 18 • If you plan to add users with phones, make sure that you have unassigned phones in your
19 account.
- 20 • Ensure that you add emergency response locations for your company locations.

21 Procedure

- 22 1. From the Admin Portal homepage, navigate to **Users > User List > Users with**
23 **Extensions**.
- 24 2. At the top-right corner of the list, click **Add Users in Bulk**.
- 25 3. On the Add users in bulk window, click **Download template**.

26 Avaya Cloud Office Service Web displays the Customize template window.

- 27 4. On the Customize template window, configure the mandatory columns of the template as
28 follows:
 - 29 a. From the **Emergency Response Location** list, select the appropriate location or
30 locations.
 - 31 b. If you have multiple sites, select the appropriate site or sites.
 - 32 c. If you have assigned cost centers, select the appropriate cost center or cost centers.
- 33 5. **(Optional)** Customize the optional columns.
- 34 6. From the bottom-left corner, select the format of the template.
- 35 7. Click **Download**.

36 Your browser starts downloading the Add Users in Bulk template.

Avaya Cloud Office Service Web redirects you to the Add users in bulk window.

8. Open the **Add Users in Bulk** template, follow the instructions on the Instructions sheet, and complete the **Add_New_Assigned_Ext.** sheet accordingly.

9. Save your changes on the template.

10. Return to the Add users in bulk window and do one of the following to upload your template:

- Drag and drop your file to the highlighted area.
- Click **Upload file** and select the template.

11. Click **Next**.

Avaya Cloud Office Service Web displays the Setup Options window.

12. **(Optional)** To allow users to have multiple accounts, under **Will you require to have unique emails?**, select **No**.

13. Select one of the following options for activating the users:

- **Send invite:** Send a welcome email to each user with an activation link.
- **Activate by assigning credentials:** Assign credentials to the user. You must create a password, a PIN, and a security question and answer for each user. Users do not receive a welcome email.
- **Activate later:** Set up users now, but activate them later. Users do not receive a welcome email.

14. To send the upload report to others, in the **Additional recipients** field, type the emails.

You can separate the emails by a comma or a semicolon if you plan to add multiple recipients.

15. Click **Save**.

Related links

[Phone number management](#) on page 79

[Phone management](#) on page 87

Disabling a user

About this task

Disable a user to temporarily limit their access to Avaya Cloud Office™, for example, when the user takes a vacation. A disabled user cannot make and receive calls, access their account online, or use mobile applications.

Note:

You can disable multiple users simultaneously.

Procedure

1. From the Admin Portal homepage, navigate to **Users > User List > Users with Extensions**.

2. Next to the user to disable, select the check box.

You can now click the quick access buttons.

3. Click the **Disable** quick access button.

4. On the confirmation dialog box, click **Yes**.

The user's status indicator changes to .

5. **(Optional)** To reenable a user, perform the following steps:

a. Next to the user to enable, select the check box.

You can now click the quick access buttons.

b. Click the **Enable** quick access button.

The user's status indicator changes to .

Deleting a user

About this task

Permanently delete a user from your Avaya Cloud Office™ account, for example, when the user leaves your company. When you delete a user, their extension becomes available in the list of unassigned extensions. You can later assign this extension to a different user.

When you delete a user, any messages, greetings, rules, recorded meeting sessions, and recorded calls of the user are lost and cannot be recovered.

Note:

21 You can delete multiple users simultaneously.

Before you begin

Make sure to disable users before deleting them. You cannot delete active users.

Procedure

1. From the Admin Portal homepage, navigate to **Users > User List > Users with Extensions**.

2. Next to the user to delete, select the check box.

You can now click the quick access buttons.

3. Click the **Delete** quick access button.

4. On the confirmation dialog box, click **Confirm**.

Result

Avaya Cloud Office Service Web deletes the user from the users list and moves the user's extension to the list of unassigned extensions.

Copying a user extension and assigning it to a new user

About this task

Copy an existing user extension to create a new user extension with the same settings and assign this extension to a new user. You can select to copy user settings, device settings, and group memberships of the extension.

Procedure

1. From the Admin Portal homepage, navigate to **Users > User List > Users with Extensions**.

2. Next to the user to copy, click **:**.

3. Click **Copy and Assign**.

Avaya Cloud Office Service Web displays the Copy and Assign window.

4. Select **Use free or paid license** and click **Next**.

5. On the Copy Settings tab, select the check boxes of the settings to copy and click **Next**.

6. On the Choose User Type tab, do one of the following:

- To add a user with a phone, in the Office User section, select a location and click **Select**.
- To add a user without a phone, in the Mobile User section, click **Select**.

7. On the Add User Info tab, enter the new user's email, first name, and last name.

8. Select a cost center and a site if applicable.

9. **(Optional)** In the **Ext.** field, change the extension number.

10. If you selected Office User in step 6, also do the following:

- a. From the **Phone** list, select a phone for the new user.

You can assign Avaya Cloud Office Phone App for softphone capabilities, select a phone from your unassigned devices, purchase a new phone, or use an existing SIP phone.

- b. To assign a phone number to the new user, under **Number**, click **Select**.

Avaya Cloud Office Service Web displays the Select Number window.

- c. On the Select Number window, select a phone number.

You can select a phone number from your number inventory or acquire a new phone number.

d. Click **Done**.

11. Click **Next**.

12. On the Setup Options tab in the Setup Option section, select one of the following options:

- **Send invite:** Send a welcome email to the user with an activation link.
- **Activate by assigning credentials:** Assign credentials to the user. You must create a password, a PIN, and a security question and answer for the user. The user does not receive a welcome email.

When you select **Activate by assigning credentials**, Avaya Cloud Office Service Web displays the Credentials section.

- **Activate later:** Set up the user now, but activate them later. The user does not receive a welcome email.

13. If you selected **Activate by assigning credentials**, do the following:

- a. In the Credentials section, complete the **Password**, **Reenter Password**, **PIN**, and **Reenter PIN** fields.
- b. From the **Security Question** list, select a question.
- c. In the **Answer** field, type an answer for the security question.
- d. In the **Emergency Response Location** section, click **Add** and select the appropriate location.

14. Click **Submit**.

Avaya Cloud Office™ displays the pop-up window with the confirmation message.

Resetting and assigning a user extension to another user

About this task

Reset an extension and assign this extension to another user. You can select to reset user settings, device settings, and group memberships of the extension.

Before you begin

Ensure that you disable the extension you are planning to reset.

Procedure

1. Click **Users > User List > Users with Extensions**.
2. Next to the disabled user, click **:**.
3. Click **Reset and Assign**.

Avaya Cloud Office Service Web displays the Reset and Assign window.

4. On the Reset Settings tab, select the check boxes of the settings to reset and click **Next**.

5. On the Assign New User tab, in the Setup Option section, select one of the following options:

- **Send invite:** To set up the user by sending a welcome email with an activation link.
- **Activate by assigning credentials:** To set up the user by assigning credentials. You must create a password, a PIN, a security question, and an answer for each user. The user does not receive a welcome email.

When you select **Activate by assigning credentials**, Avaya Cloud Office Service Web displays the Credentials, New User Info, and Settings sections.

- **Activate later:** To set up the user now, but activate them later. The user does not receive a welcome email.

6. If you select **Activate by assigning credentials**, do the following:

- a. In the Credentials section, complete the **Password**, **Reenter Password**, **PIN**, and **Reenter PIN** fields.
- b. From the **Security Question** list, select a question.
- c. In the **Answer** field, type an answer for the security question.
- d. In the **Emergency Response Location** section, click **Add** and select the appropriate location.

7. In the New User Info section, complete the mandatory the **First Name**, **Last Name**, and **Email Address** fields.

8. **(Optional)** Complete the **Contact Phone**, **Mobile Phone**, **Job Title**, and **Department** fields.

9. **(Optional)** If you have multiple company sites, select the user's site from the **Site** list.

10. **(Optional)** To modify the user's role, under Assigned Role, click **Edit Role** and select a new role.

11. In the Settings section, select the check boxes of the settings to activate.

12. Click **Reset and Assign**.

Avaya Cloud Office Service Web displays the pop-up window with the confirmation message.

Related links

[Disabling a user](#) on page 54

Upgrading user licenses in bulk

About this task

Upgrade multiple Meetings licenses to Office licenses simultaneously. When bulk upgrading licenses, you must download a template in .xlsx format from Avaya Cloud Office Service Web,

complete the required fields following the instructions, and upload the template back to Avaya Cloud Office Service Web.

*** Note:**

- 3 You can assign phone numbers and deskphones to users or activate the softphone
- 4 capabilities while upgrading licenses.

Before you begin

Ensure that you add emergency response locations for your company locations.

Procedure

1. From the Admin Portal homepage, navigate to **Users > User List > Users with Extensions**.
2. At the top-right corner, click .
3. Click **Upgrade to Office licenses in bulk**.
4. On the Upgrade to Office licenses in bulk window, click **Download template** and then click **Download**.
Your browser starts downloading the Bulk Upgrade to Office License template.
5. Open the Bulk Upgrade to Office License template, follow the instructions on the Instructions sheet, and complete the Add_Office_License sheet accordingly.
6. Save your changes on the template.
7. On the Upgrade to Office licenses in bulk window, upload your template by doing one of the following:
 - Drag and drop your file to the highlighted area.
 - Click **Upload file** and select the template.
8. Click **Submit**.

Editing user information in bulk

About this task

Edit the information of up to 5000 users simultaneously. When bulk-editing user information, download a template in `.xlsx` format from Avaya Cloud Office Service Web, make the changes on the template, and upload it back to Avaya Cloud Office Service Web.

You can edit user information, such as first and last name, email address, extension number, country, language, department, site, job title, and role.

Procedure

1. From the Admin Portal homepage, navigate to **Users > User List > Users with Extensions**.

2. At the top-right corner, click .

3. Click **Edit User Information**.

Avaya Cloud Office Service Web displays the Edit User Information window.

4. In the **Delivery method** list, do one of the following:

- Select **Download to computer** and click **Download**.

Your browser starts downloading the `Edit User Information` template.

- Select **Send as email attachment**, enter your email, and click **Send**.

Avaya Cloud Office Service Web sends an email with the `Edit User Information` template attached.

5. Open the `Edit User Information` template and edit the user information on the sheet as required.

6. Save your changes on the template.

7. On the Edit User Information window, in the Step 3: Upload File section, click **Browse** and select your template.

8. Click **Upload**.

9. In the confirmation dialog box, click **Yes**.

10. **(Optional)** To notify the users of the changes, select the **Notify users about Details update** check box.

11. To send the upload result to specific users in the **CC:** field, enter their email addresses.

You can separate the emails by a comma or a semicolon if you plan to add multiple recipients.

12. Click **Done**.

User settings

As an administrator, you can change user settings and manage user extensions for users. Users can also configure the same settings by logging into the My Extension portal with their Avaya Cloud Office™ credentials.

Note:

- Administrators can also create and apply templates for user settings and call handling preferences to configure multiple users simultaneously.

After clicking a user from the Users with Extensions list, Admin Portal displays a side pane with various user settings. By default, Admin Portal displays the following extension settings:

- User Details: To configure user details, such as name, job title, and extension number.

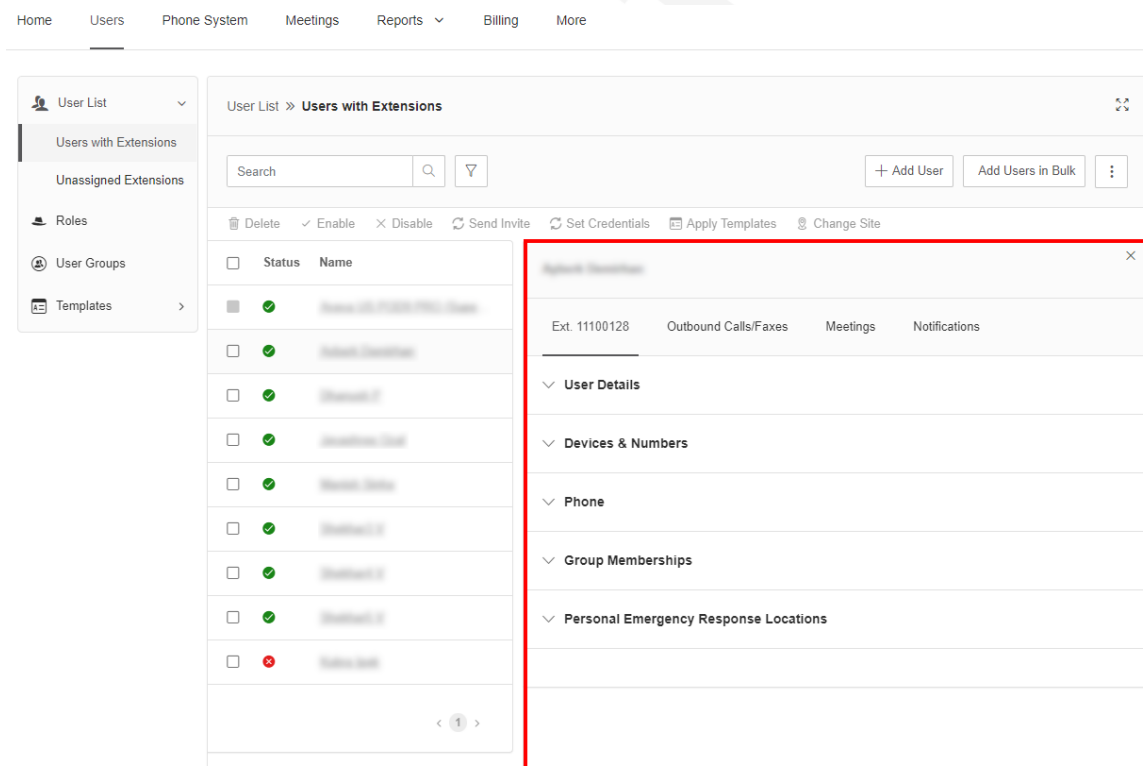
- **Devices & Numbers:** To manage user phones and phone numbers. You can also manage phones and phone numbers from the Phone System tab of Admin Portal.
- **Phone:** To configure incoming call and voicemail settings for the user.
- **Group Memberships:** To manage the group memberships of the user.
- **Personal Emergency Response Locations:** To manage the emergency response locations of the user.

You can access more settings on other tabs. For example, on the Outbound Calls/Faxes tab, Admin Portal displays the following settings:

- **Caller ID:** To set the caller ID that is displayed when the user makes a call.
- **Fax Settings:** To configure the general fax settings for the user.

On the Meetings tab, you can configure meeting settings, such as the video and audio settings, for that user. You can also allow other users to schedule meetings on behalf of that user.

On the Notifications tab, you can configure the voicemail, fax, text message, and missed call notifications that the user receives. You can also set whether the user receives these notifications by email, by SMS, or both.



1 Resetting a user's password, PIN, or security question

2 About this task

3 Reset the user's password, PIN, or security question. Passwords are used to access Avaya Cloud
4 Office™ accounts, PIN codes are for voicemail messages and deskphones, and security questions
5 are used for recovering lost passwords or PINs.

6 Procedure

- 7 1. From the Admin Portal homepage, navigate to **Users > User List > Users with**
8 **Extensions**.
- 9 2. Click the user.
- 10 3. Click **User Details > Security**.
- 11 4. Under Password and PIN, click **Change**.
- 12 5. In the **Current Admin Password** field, enter your account password and click **Next**.
- 13 6. On the Password tab, in the **New Password** and **Reenter New Password** fields, enter the
14 new password.
- 15 7. On the PIN tab, in the **New PIN** and **Reenter New PIN** fields, enter the new PIN.
- 16 8. On the Security Question tab, select a question in the **Security Question** field and enter
17 the answer in the **Answer** field.
- 18 9. Click **Save**.

19 User groups

20 As an administrator, you can create user groups and assign a manager within a group to monitor
21 other group members. User groups reflect the structure of the organization, such as departments,
22 projects, or teams. Group members can belong to several groups simultaneously.

23 A group manager has higher permissions and can access and modify group settings, group
24 reports, and call logs of each member. Group managers can assign any user to the Standard
25 (International) role.

26 Creating a user group

27 About this task

28 Create a user group and assign a group manager.

29 Procedure

- 30 1. From the Admin Portal homepage, navigate to **Users > User Groups**.
- 31 2. Click **+ New Group**.

- Avaya Cloud Office Service Web displays the Create User Group window.
3. On the Describe User Group tab, in the **Name** field, enter the group name.
4. **(Optional)** In the **Description** field, enter a description for the group.
5. Click **Next**.
6. On the Add Members tab, from the users list, select the users to add as group members.
7. Click **Next**.
8. On the Select Group Manager tab, from the list of group members, select the user to assign as a group manager.
9. Click **Done**.

Result

Avaya Cloud Office Service Web confirms that the user group is created.
You can see the new user group on the User Groups tab.

Managing user groups

About this task

Modify an existing user group. You can change the name and description of an existing user group, change its manager, and add or remove group members.

Procedure

1. From the Admin Portal homepage, navigate to **Users > User Groups**.
2. Click the user group to change.
3. To change the name and description of a group, on the Overview tab, do the following:
 - a. Click **Edit**.
 - b. Enter the new name and description in the **Name** and **Description** fields.
4. To change the group manager, on the Overview tab, do the following:
 - a. Click **Change**.
Avaya Cloud Office Service Web displays the Change Group Manager window.
 - b. From the list of group members, select the user to appoint as manager.
 - c. Click **Done**.
5. Click **Save**.
6. To add new members to the group, on the Member tab, do the following:
 - a. Click **+ Add Member**.
Avaya Cloud Office Service Web displays the Add Members to Group window.
 - b. From the users list, select the check boxes of the users to add.

c. Click **Add**.

7. To remove members from the group, on the Member tab, do the following:

a. On the group members list, select the check boxes of the group members to remove.

b. Click **Remove**.

Deleting a user group

About this task

When you delete a user group, the group members no longer belong to this group, and the group manager loses their privileges.

Procedure

1. From the Admin Portal homepage, navigate to **Users > User Groups**.
2. Click the user group to delete.
3. On the Overview tab, click **Delete**.
4. On the confirmation dialog box, click **Yes**.

Result

Avaya Cloud Office Service Web removes the user group from the user groups list.

Chapter 8: Unassigned extensions

Unassigned extensions are user extensions you set up but yet to assign. Depending on the way you set them up, unassigned extensions can have associated phone numbers, phones, or both.

From the Unassigned Extensions page, you can view the unassigned extensions in your company account, add new ones, and activate these extensions by assigning them to new users. If the Multi-site feature is enabled on your company account, you can filter the unassigned extensions by site and change their sites.

When you delete a user, Avaya Cloud Office Service Web moves this user's extension to the Unassigned Extensions page. You can then delete the unassigned extension permanently from your company account.

Adding unassigned extensions with phones

About this task

Add new unassigned extensions with phones that you can later assign to users. When adding new unassigned extensions with phones, you can:

- Choose Avaya Cloud Office Phone App for softphone capabilities.
- Choose from your unassigned phones.
- Order a new phone.
- Use an existing SIP phone.

You can add multiple unassigned extensions simultaneously.

* Note:

- Additional charges apply if there is no available license in your company account. You can view the number of available licenses while adding unassigned extensions.

Procedure

1. From the Admin Portal homepage, click **Users > User List > Unassigned Extensions**.
2. At the top-right corner of the list, click the **Add Unassigned Ext.** button.
Avaya Cloud Office Service Web displays the Add Unassigned Ext window.
3. Select a location for the extension or extensions and click **Next**.

4. On the Add Users with Devices subtab, in the **Qty** field, enter the number of unassigned extensions to add.
5. **(Optional)** If you have multiple cost centers, select one from the **Cost Center** list.
6. From the **State/Province** and **Area Code** lists, select a location and an area code.
7. From the **Number Option** list, select one of the following options:
 - **New numbers**
 - **Number Inventory**
8. **(Optional)** If you have multiple sites, select one from the **Site** list.
9. Click **Select a Device**, and on the Add Users - Select a Device window, do one of the following:
 - To use Avaya Cloud Office Phone App, on the Other Phones tab, click **Avaya Cloud Phone Desktop App**.
 - To select a phone from the list of unassigned devices, on the Recently Bought or Desktop Phones tabs, select a phone that is available on your site.
On the Recently Bought and Desktop Phones tabs, you can see the number of available desktop phones for each model.
 - To purchase a new phone, on the Recently Bought or Desktop Phones tabs, select a phone model.
If you have unused phones for the selected model, Avaya Cloud Office Service Web automatically selects the ones in your site.
 - To use an existing SIP phone, on the Other Phones tab, click **Existing Phone**.
10. Click **Select**.
Avaya Cloud Office Service Web returns you to the Add Unassigned Ext window.
11. To create the purchase order, click **Add**.
12. **(Optional)** To add more items to your basket, repeat the steps 4 to 7.
13. Click **Next**.
14. **(Optional)** When purchasing new phones, add shipping information and confirm your order.

Adding unassigned extensions without phones

About this task

Add new unassigned extensions without phones to your company account. Even though these extensions do not have phones associated with them, you can still assign phone numbers to them.

You can add multiple unassigned extensions simultaneously.

Procedure

1. From the Admin Portal homepage, click **Users > User List > Unassigned Extensions**.
2. At the top-right corner of the list, click the **Add Unassigned Ext.** button.
- Avaya Cloud Office Service Web displays the Add Unassigned Ext window.
3. Select a location for the extension or extensions and click **Next**.
4. Click the **Add Users without Devices** tab.
5. In the **Qty** field, type the quantity.
6. **(Optional)** To add extensions with phone numbers, from the **With Numbers** list, select **Yes** and do the following:
 - a. **(Optional)** If you have multiple cost centers, select one from the **Cost Center** list.
 - b. From the **State/Province** list, select a location.
 - c. From the **Area Code** list, select an area code.
 - d. From the **Number Option** list, choose to acquire a new phone number or use one from your number inventory.
 - e. **(Optional)** If you have multiple sites, select one from the **Site** list.
7. **(Optional)** To add extensions without phone numbers, from the **With Numbers** list, select **No** and do the following:
 - a. **(Optional)** If you have multiple cost centers, select one from the **Cost Center** list.
 - b. **(Optional)** If you have multiple sites, select one from the **Site** list.
8. To create the purchase order, click **Add**.
9. **(Optional)** To add more items to your basket, repeat the steps 5 to 8.
10. Click **Next**.

Assigning an unassigned extension to a user

About this task

Select an unassigned extension and assign it to a user. When you assign an extension to a user, Avaya Cloud Office™ moves this user to the Users with Extensions page.

Procedure

1. From the Admin Portal homepage, click **Users > User List > Unassigned Extensions**.
2. Click the unassigned extension to assign.

3. On the extension details page, in the Setup Option section, select one of the following options:

- **Send invite:** Send a welcome email to the user or users with an activation link.
- **Activate by assigning credentials:** Assign credentials to the user or users. You must create a password, a PIN, and a security question with an answer for the user. Users do not receive a welcome email.

When you select **Activate by assigning credentials**, Avaya Cloud Office Service Web displays the Credentials section alongside the New User Info and Settings sections.

- **Activate later:** Set up users now, but activate them later. Users do not receive a welcome email.

4. If you select **Activate by assigning credentials**, do the following:

- a. In the Credentials section, complete the **Password**, **Reenter Password**, **PIN**, and **Reenter PIN** fields.
- b. From the **Security Question** list, select a security question for the user.
- c. In the **Answer** field, type an answer for the security question on behalf of the user.
- d. **(Optional)** To set an emergency response location for the user, in the Emergency Response Location section, click **Add**.

5. In the New User Info section, complete the following fields:

- **First Name**
- **Last Name**
- **Email Address**

6. **(Optional)** To require the user to have a unique email ID, select **Users require unique email IDs**.

This option is available only when activating by assigning credentials or activating later.

7. **(Optional)** Click **Verify Email Uniqueness**.

- If the email address is unique, Avaya Cloud Office Service Web displays a notification window confirming its uniqueness.
- If the email address is not unique, Avaya Cloud Office Service Web displays the Duplicate Email Association window from where you can edit duplicate email addresses.

8. **(Optional)** To change the extension number, in the **Extension Number** field, edit the number.

9. **(Optional)** Complete the following fields:

- **Contact Phone**

You can select the **Publish in Company Directory** check box to publish the user's contact phone in the company directory.

- **Mobile Phone**

You can select the **Publish in Company Directory** check box to publish the user's mobile phone number in the company directory.

- **Job Title**

- **Department**

10. **(Optional)** If you have multiple sites, select one from the **Site** list.

11. **(Optional)** To modify the user's role, under Assigned Role, click **Edit Role** and select a new role.

12. In the Settings section, select the user language, greeting language, and regional format.

13. **(Optional)** Select or clear the following check boxes:

- **Yes, I would like to receive information on product education, training materials, etc.**

- **Include User in Company Directory**

14. Click **Save**.

This button changes to **Save & Enable** when activating by assigning credentials.

Assigning unassigned extensions in bulk

About this task

Assign up to 5000 unassigned extensions to new users simultaneously. When bulk-assigning unassigned extensions, you must first download a template in `.xlsx` or `.xls` formats from Avaya Cloud Office Service Web. Then, complete the required fields following the instructions and upload the template back to Avaya Cloud Office Service Web.

You can customize the template to fit your organizational needs before downloading it. If you do not add the optional Roles column to your template, Avaya Cloud Office Service Web assigns users the default role, which is the Standard (International) role.

Before you begin

Ensure that you have emergency response locations set up for your company locations from **Phone System > Emergency Calling > Company Emergency Response Locations**.

Procedure

1. From the Admin Portal homepage, click **Users > User List > Unassigned Extensions**.
2. On the Unassigned Extensions page, click **Bulk Enable Extensions**.
3. On the Bulk enable extensions window, click **Download template**.
4. On the Customize template window, from the **Emergency Response Location** list, select the location or locations to include in the template.
5. **(Optional)** If you have multiple sites, select the site or sites to include in the template.

6. **(Optional)** If you have cost centers, select the cost center or cost centers to include in the template.
7. **(Optional)** Customize the optional columns.
8. At the bottom of the Customize template window, select the template format.
9. Click **Download**.
 - Your browser starts downloading the `Bulk Enable Extensions` template.
 - Avaya Cloud Office Service Web redirects you to the Bulk enable extensions window.
10. Open the `Bulk Enable Extensions` template and complete the `Enable_Unassigned_Extensions` sheet, following the instructions on the Instructions sheet.
11. Save your changes on the template.
12. Return to the Bulk enable extensions window and upload your template with one of the following methods:
 - Drag and drop your file to the highlighted area.
 - Click **Upload file** and select the template.
13. Click **Next**.

Avaya Cloud Office Service Web displays the Setup options window.
14. **(Optional)** To allow users to have multiple accounts with the same email address, under **Will you require to have unique emails?**, select **No**.

This option is available only when activating by assigning credentials or activating later.
15. Select one of the following options for activating the users:
 - **Send invite**: Send a welcome email to the user or users with an activation link.
 - **Activate by assigning credentials**: Assign credentials to the user or users. You must create a password, a PIN, and a security question with an answer for the user. Users do not receive a welcome email.
 - **Activate later**: Set up users now, but activate them later. Users do not receive a welcome email.
16. **(Optional)** To send the upload report to recipients other than the default Super Admin, in the **Additional recipients** field, enter the emails.

Separate the emails by a comma or a semicolon when adding multiple recipients.
17. Click **Save**.

Related links

[Adding an emergency response location](#) on page 44

1 Deleting an unassigned extension

2 About this task

3 Delete an unassigned extension from your company account. Deleting unassigned extensions
4 does not impact your bill, and you cannot recover deleted extensions.

5 Procedure

- 6 1. From the Admin Portal homepage, click **Users > User List > Unassigned Extensions**.
- 7 2. Next to the extension to delete, click **:**.
- 8 3. Click **Delete**.
- 9 4. On the confirmation dialog box, click **Delete**.

10 Result

11 Avaya Cloud Office Service Web permanently deletes the unassigned extension.

12 Copying a user extension to an unassigned extension

13 About this task

14 Copy an existing user extension to an unassigned extension to create a user extension with the
15 same settings. Then, assign this extension to a new user. You can select to copy user settings,
16 device settings, and group memberships of the extension.

17 Procedure

- 18 1. From the Admin Portal homepage, click **Users > User List > Users with Extensions**.
- 19 2. Next to the user to copy, click **:**.
- 20 3. Click **Copy and Assign**.

21 Avaya Cloud Office Service Web displays the Copy and Assign window.

- 22 4. Select **Use unassigned extension** and click **Next**.
- 23 5. On the Select Unassigned Extension tab, do one of the following:
 - 24 • To select an unassigned extension with a phone, on the Users with Devices subtab,
25 select the extension.
 - 26 • To select an unassigned extension without a phone, on the Users without Devices
27 subtab, select the extension.
- 28 6. Click **Next**.
- 29 7. On the Copy Settings tab, select the check boxes of the settings to copy and click **Next**.

8. On the Assign New User tab, in the Setup Option section, select one of the following options:

- **Send invite:** Send a welcome email to the user or users with an activation link.
- **Activate by assigning credentials:** Assign credentials to the user or users. You must create a password, a PIN, and a security question with an answer for the user. Users do not receive a welcome email.

When you select **Activate by assigning credentials**, Avaya Cloud Office Service Web displays the Credentials section alongside the New User Info and Settings sections.

- **Activate later:** Set up users now, but activate them later. Users do not receive a welcome email.

9. If you select **Activate by assigning credentials**, do the following:

- a. In the Credentials section, complete the **Password**, **Reenter Password**, **PIN**, and **Reenter PIN** fields.
- b. From the **Security Question** list, select a security question for the user.
- c. In the **Answer** field, type an answer for the security question on behalf of the user.
- d. **(Optional)** To set an emergency response location for the user, in the Emergency Response Location section, click **Add**.

10. In the New User Info section, complete the following fields:

- **First Name**
- **Last Name**
- **Email Address**

11. **(Optional)** To require the user to have a unique email ID, select **Users require unique email IDs**.

This option is available only when activating by assigning credentials or activating later.

12. **(Optional)** Click **Verify Email Uniqueness**.

- If the email address is unique, Avaya Cloud Office Service Web displays a notification window confirming its uniqueness.
- If the email address is not unique, Avaya Cloud Office Service Web displays the Duplicate Email Association window from where you can edit duplicate email addresses.

13. **(Optional)** To change the extension number, in the **Extension Number** field, edit the number.

14. **(Optional)** Complete the following fields:

- **Contact Phone**

You can select the **Publish in Company Directory** check box to publish the user's contact phone in the company directory.

- **Mobile Phone**

You can select the **Publish in Company Directory** check box to publish the user's mobile phone number in the company directory.

- **Job Title**

- **Department**

15. **(Optional)** If you have multiple sites, select one from the **Site** list.

16. **(Optional)** In the Settings section, select or clear the following check boxes:

- **Yes, I would like to receive information on product education, training materials, etc.**

- **Include User in Company Directory**

17. Click **Copy and Assign**.

Draft

Chapter 9: User roles

User roles are sets of permissions that determine the level of access to Avaya Cloud Office™ and its features. As an administrator, you can manage the predefined user roles or create custom roles based on user responsibilities and requirements, then assign them to users.

Note:

Custom roles are only available on Premium and Ultimate subscription plans.

The predefined user roles that come with Avaya Cloud Office™ by default are as follows:

- **Billing Admin:** Full access to billing functions, user-level settings, international dialing, and limited analytical features.
- **Manager:** All capabilities of the Standard (International) role with access to the key functions such as Reports and Call Log.
- **Phone System Admin:** All capabilities of the Standard (International) role with access to phone system settings and full access to the user-level settings.
- **Standard:** User-level access without international dialing access.
- **Standard (International without Premium):** User-level access with international dialing access but without premium dialing access.
- **Standard (International):** User-level access with international dialing access.
- **Standard (no Premium):** User-level access without international and premium dialing access.
- **Super Admin:** Complete system administrator-level access.
- **User Admin:** Full access to the user administration, international dialing, and system features.

You cannot modify the predefined user roles. However, you can create custom roles as required.

Avaya Cloud Office™ automatically assigns the Standard (International) role to newly added users. On Premium and Ultimate subscription plans, you can set any predefined or custom role as the default role to automatically assign this role to all new users.

Assigning a role to a user

About this task

Assign a role to a user to provide them with a set of permissions.

Procedure

1. From the Admin Portal homepage, navigate to **Users > Roles**.
2. Click the role to assign.
Avaya Cloud Office Service Web displays the Overview page for the selected role.
3. Click **Assigned Users > Assign User**.
Avaya Cloud Office Service Web displays the Assign users to role window with a list of users to whom you can assign this role.
4. From the list, select the user to assign the role.
You can use the Search bar to find the required user.
5. Click **Assign**.

Changing a user's role

About this task

Change a user's role to revoke the previously assigned role and assign a new role to this user.

Procedure

1. From the Admin Portal homepage, navigate to **Users > User List > Users with Extensions**.
2. Click the user to change the role.
3. Click **User Details > Settings & Permissions**.
4. In the **Roles** section, click **Edit**.
5. On the Roles window, select a new role for the user.
6. Click **Save**.

Removing access permissions from users

About this task

You can view the users assigned to a specific role and recall this role from selected users to revoke the set of permissions granted with this role. When you recall a role from a user, Avaya Cloud Office Service Web automatically assigns this user to the default role. The Standard (International) role is the default role.

Procedure

1. From the Admin Portal homepage, navigate to **Users > Roles**.

2. Click the role to manage.
Avaya Cloud Office Service Web displays the Overview page for the selected role.
3. Click **Assigned Users**.
4. Next to the user to remove, click **Remove**.
5. **(Optional)** To remove multiple users, select the check boxes of the users and click **Remove**.
6. In the confirmation dialog box, click **Yes**.
Avaya Cloud Office Service Web recalls the role of the user.

Custom roles

As an administrator, you can create custom roles in Avaya Cloud Office™. With custom roles, you can select a specific set of permissions for users. To create a custom role, you must select an existing role as a starting point and modify the permissions assigned for this role. You can use the procedures for predefined roles to work with custom roles. You can also modify and delete custom roles.

 Note:

- Custom roles are only available on Premium and Ultimate subscription plans.

Creating a custom role

About this task

Create a custom role to select the required set of permissions for a user. To create a custom role, you must select a predefined user role and modify the permissions for this role.

 Note:

- Custom roles are only available on Premium and Ultimate subscription plans.

Procedure

1. From the Admin Portal homepage, navigate to **Users > Roles**.
2. Click **New Role**.
Avaya Cloud Office Service Web displays the Create New Role window.
3. On the Select Role tab, select a role as a starting point and click **Next**.
4. On the Describe Role tab, in the **Name** field, type the role name.
5. **(Optional)** In the **Description** field, type the role description.
6. Click **Next**.
7. On the Permissions tab, select or clear the check boxes for the permissions as required.

8. Click **Create Role**.

Avaya Cloud Office Service Web displays the New role created window.

9. **(Optional)** To assign the newly created role to users, on the New role created window, click **Assign**.

Editing a custom role

About this task

Edit a custom role to change its name, description, or the permissions granted with this role.

Procedure

1. From the Admin Portal homepage, navigate to **Users > Roles**.

2. Click the custom role to edit.

Avaya Cloud Office Service Web displays the Overview page for the selected role.

3. Click **Edit**.

4. Edit the role name and description.

5. In the Permissions section, select or clear the check boxes for the permissions.

6. Scroll down and click **Save**.

Deleting a custom role

About this task

Delete a custom role to permanently remove this role from Avaya Cloud Office™. If you delete a custom role, Avaya Cloud Office™ automatically assigns users assigned to this role to the default role, which is the Standard (International) role by default.

Procedure

1. From the Admin Portal homepage, navigate to **Users > Roles**.

2. Click the custom role to delete.

Avaya Cloud Office Service Web displays the Overview for the selected custom role.

3. Scroll down and click **Delete**.

4. In the confirmation dialog box, click **Yes**.

Setting the default role

About this task

Set a predefined or custom role as the default role to automatically assign this role to all new users. By default, Avaya Cloud Office™ assigns the Standard (International) role to new users.

 Important:

- 1 Assigning a default role is only available on Premium and Ultimate subscription plans.

Procedure

1. From the Admin Portal homepage, navigate to **Users > Roles**.

2. Click the role to set it as default.

Avaya Cloud Office Service Web displays the Overview page for the selected role.

3. Click **Edit**.

4. Under the **Type of Role** section, select the **Set as Default** check box.

5. On the Alert window, click **OK**.

6. Scroll down and click **Save**.

Chapter 10: Phone number management

You can manage the phone numbers in the Avaya Cloud Office™ phone system. The types of phone numbers that Avaya Cloud Office™ supports are as follows:

- Local numbers: Phone numbers that are associated with specific areas or cities.
- Toll-free numbers: Free to call phone numbers that start with a specific 3-digit code.
- Vanity numbers: Customized phone numbers that spell out words or acronyms in the alphanumeric dialpads. For example, +1-(866)-GO-AVAYA.

You can add new phone numbers to your number inventory, assign them to users or phones, or use them as direct phone numbers for the following:

- Call queues
- Paging only groups
- Shared and delegated lines
- Message-only, announcement-only, and limited extensions

You can view a list of the phone numbers in the phone system from the All Numbers subtab. The Numbers in Use subtab displays the assigned phone numbers. You can use the Search bar to find phone numbers. For example, you can type the name of a user to see the phone numbers assigned to this user.

You can also port phone numbers from other providers to Avaya Cloud Office™ or view your pending phone number requests.

Related links

[Number inventory overview](#) on page 83

Assigning multiple phone numbers

About this task

Assign multiple phone numbers simultaneously. When assigning phone numbers, you can use the phone numbers in your number inventory or obtain new phone numbers.

You can assign phone numbers to extensions, the Auto-Receptionist, or set the phone numbers as dial-in numbers for Avaya Cloud Office Video & Audio Conferencing meetings.

! Important:

- 1 Additional charges apply if there is no available license in your company account.

Procedure

1. From the Admin Portal homepage, navigate to **Phone System > Phone Numbers > All Numbers**.

2. At the top-right corner, click **+ Add Member**.

Avaya Cloud Office Service Web displays the Add Numbers window.

3. On the Select Numbers tab, from the **Location** list, select the country.

4. From the **Number Type** list, select one of the following options:

- **Local Number**
- **Toll-Free Number**
- **Vanity**

5. If you select **Local Number**, do the following:

- a. Select a cost center if applicable.

- b. Complete the location-specific fields for the phone number or numbers.

The location-specific fields change depending on the country you select from the **Location** list.

For example, if you select **Domestic - US/Canada**, Avaya Cloud Office Service Web displays the **State/Province** and **Area Code** fields.

- c. Select the phone number or numbers from the **Numbers Available in your Number Inventory** or **Numbers Available from Avaya Cloud Office** lists.

- d. Click **Add Numbers**.

You can see a summary of your order in the Numbers Added section.

6. If you select **Toll-Free Number**, do the following:

- a. Select the first three digits of the phone number or numbers.

- b. Select the phone number or numbers from the **Numbers Available in your Number Inventory** or **Numbers Available from Avaya Cloud Office** lists.

- c. Click **Add Numbers**.

You can see a summary of your order in the Numbers Added section.

7. If you select **Vanity**, do the following:

- a. Select the first three digits of the phone number.

- b. Type the rest of the number.

- c. Click **Search**.

Avaya Cloud Office Service Web displays a CAPTCHA test.

d. Type the characters you see in the image.

e. Click **Submit**.

f. Select the phone number or numbers from the **Numbers Available in your Number Inventory** or **Numbers Available from Avaya Cloud Office** lists.

g. Click **Add Numbers**.

You can see a summary of your order in the Numbers Added section.

8. **(Optional)** To add more phone numbers to your order, repeat steps 3 to 7.

You can see the new phone numbers you add in the Numbers Added section as you add them.

9. Click **Next**.

10. On the Assign to Ext. tab, next to the phone number or numbers, click the **Assign to Ext.** button.

11. Select one of the following options:

- **Auto-Receptionist**
- **Avaya Cloud Office Video & Audio Conferencing**
- **Extension**

If you select **Extension**, you must also select the extension to assign.

12. Click **Done**.

13. On the Confirm Order tab, scroll down and select the check box to accept the terms and conditions.

14. Click **Next**.

15. On the Order Confirmation tab, scroll down and click **Done**.

Result

Avaya Cloud Office Service Web adds the new phone number or numbers to the All Numbers and Numbers in Use lists.

Reassigning a phone number

About this task

Reassign active phone numbers to other extensions, to the Auto-Receptionist, or set them as dial-in numbers for Avaya Cloud Office Video & Audio Conferencing meetings.

*** Note:**

- 1 You cannot directly reassign a phone number set as the primary number of a phone. You must
- 2 first remove such a number from the phone and move it to your inventory, then assign it from
- 3 your inventory.

Procedure

1. From the Admin Portal homepage, navigate to **Phone System > Phone Numbers > Numbers in Use**.

2. Next to the phone number or numbers to reassign, select the check box or boxes.

You can now click the quick access buttons.

3. Click the **Assign to** quick access button.

4. Select one of the following options:

- **Auto-Receptionist**
- **Avaya Cloud Office Video & Audio Conferencing**
- **Extension**

If you select **Extension**, you must also select the extension to assign.

5. Click **Assign**.

Avaya Cloud Office Service Web displays the pop-up window with the confirmation message.

Related links

[Number inventory overview](#) on page 83

[Removing the primary number of a phone](#) on page 85

[Assigning a phone number from the inventory](#) on page 84

Deactivating a phone number

About this task

To deactivate a phone number, move it to your number inventory. Deactivated phone numbers stop receiving calls and are kept in the inventory for future use.

*** Note:**

- 26 You cannot deactivate a phone number set as the primary number of a phone. To deactivate
- 27 such numbers, you must remove them from the phones assigned as primary.

Procedure

1. From the Admin Portal homepage, navigate to **Phone System > Phone Numbers > Numbers in Use**.

2. Next to the phone number or numbers to deactivate, select the check box or boxes.

You can now click the quick access buttons.

3. Click the **Move to Inventory** quick access button.

4. On the confirmation dialog box, click **Move**.

Related links

[Number inventory overview](#) on page 83

[Removing the primary number of a phone](#) on page 85

Number inventory overview

Number inventory is a collection of all the unassigned phone numbers on your company account. When you reserve a new phone number or delete an existing user or extension, Avaya Cloud Office Service Web moves the phone number to your inventory and stores it for future use.

Storing phone numbers in your inventory ensures their ownership and availability until you assign them. For example, you can use a reserved international phone number for seasonal marketing campaigns and reserve it again after the campaign ends.

However, you require licenses on your company account to reserve phone numbers. Moreover, each phone number uses a license appropriate for its number type. You can view the available licenses on your company account while reserving phone numbers.

The types of phone numbers you can have licenses for are as follows:

- Domestic Local Numbers: Numbers to call within a specific area, such as a city or region.
- International Local Numbers: Non-native numbers formatted as local or regional numbers within a specific country.
- Domestic Toll-Free Numbers: Numbers that can be dialed charge-free within that country.
- International Toll-Free Numbers: Numbers that can be dialed charge-free internationally.

You can also delete reserved phone numbers from your inventory. Deleting reserved phone numbers enables you to release the licenses on your account for other purposes.

Adding phone numbers to the inventory

About this task

You can add new phone numbers to your inventory by reserving them. Reserving a phone number ensures its ownership and availability until you assign it.

Important:

- When adding new phone numbers, you must have licenses appropriate to the number type on your company account. Charges apply if you do not have any licenses available.

Procedure

1. From the main page, navigate to **Phone System > Phone Numbers > Number Inventory**.
2. Next to the search bar, click **Reserve Numbers**.
3. On the Reserve Numbers window, complete the details, such as location, area code, and number type for the phone number.

After completing the details, Avaya Cloud Office Service Web lists all the available numbers you can add.

4. **(Optional)** To refresh the number list, click **Change set**.
5. From the list, select the check boxes of the numbers to add.
6. Click **Add Numbers**.

You can see the newly reserved phone numbers in your number inventory.

Assigning a phone number from the inventory

About this task

Assign a reserved phone number in your inventory to an extension. You can also assign a phone number to the Auto-Receptionist or set a phone number as a dial-in number for Avaya Cloud Office Video & Audio Conferencing meetings.

Important:

- 18 Additional charges apply if there is no available license in your company account.

Procedure

1. From the main page, navigate to **Phone System > Phone Numbers > Number Inventory**.
2. Next to the phone number, click .
3. Click **Assign to**.

Avaya Cloud Office Service Web displays the Assign Number window.

4. Select one of the following:
 - **Auto-Receptionist**
 - **Avaya Cloud Office Video & Audio Conferencing**
 - **Extension**

If you select **Extension**, you must also select the extension to assign.

5. Select a cost center if applicable.
6. Click **Assign**.

1 Deleting phone numbers from the inventory

2 About this task

3 Delete the reserved phone numbers from your inventory to release licenses on your account for
4 other purposes.

* Note:

- 5 Deleting reserved phone numbers from your inventory does not affect your bill, as the licenses
6 of the deleted phone numbers remain registered on your account.

7 Procedure

- 8 1. From the main page, navigate to **Phone System > Phone Numbers > Number**
9 **Inventory**.
- 10 2. Next to the phone number, click ⋮.
- 11 3. Click **Delete**.
- 12 Avaya Cloud Office Service Web displays the Delete Number window.
- 13 4. Verify the phone number and click **Delete**.
- 14 5. **(Optional)** To delete multiple phone numbers from the inventory, select the check boxes of
15 the phone numbers and repeat steps 2 to 4.

16 Removing the primary number of a phone

17 About this task

18 Remove the primary number of a phone and move this phone number to your inventory, or
19 permanently delete it. You can later assign the phone numbers you move to your inventory.

20 Procedure

- 21 1. From the Admin Portal homepage, navigate to **Phone System > Phone Numbers >**
22 **Numbers in Use**.
- 23 2. Click the phone number.
- 24 You can use the Search field to narrow down your search.
- 25 For example, you can type a user's name.
- 26 3. Click **Phone Properties**.
- 27 4. On the confirmation dialog box, click **Yes**.
- 28 Avaya Cloud Office Service Web directs you to the settings page for the phone to which
29 that phone number is assigned.
- 30 5. In the Assigned To section, click **Remove Line**.

6. On the Delete Line window, select one of the following options:

- **Keep in Number Inventory.**
- **Delete permanently from the account.**

7. Click **Confirm**.

Related links

[Number inventory overview](#) on page 83

[Assigning a phone number from the inventory](#) on page 84

Downloading a list of all phone numbers

About this task

You can download a list in `.csv` format of all phone numbers in your Avaya Cloud Office™ account. The list shows the category, name, location, type, number type, site, substitute caller ID status, and extension information for each phone number.

Procedure

1. Click **Phone System > Phone Numbers > All Numbers**.
2. At the top-right corner, click .
3. Click **Download All Numbers**.

Your browser starts downloading the `All phone numbers.csv` file.

Viewing phone number requests

About this task

View the phone number requests for countries outside the Avaya Cloud Office™ self-service countries. Third-party agents conduct phone number acquisitions for countries outside the self-service countries, which may take time. On the Number Requests page, you can track your requests and view their status.

Note:

- Avaya Cloud Office™ is self-service in the United States, Canada, United Kingdom, and Australia. Phone number requests you make for these locations do not involve any third parties and are processed instantly.

Procedure

1. Click **Phone System > Phone Numbers > Number Requests**.
2. **(Optional)** To see the list of vanity numbers, click **Pending vanity numbers**.

Chapter 11: Phone management

As an administrator, you can manage the phones in your Avaya Cloud Office™ phone system. You can integrate the SIP-compatible phones or place an order to purchase Avaya deskphones directly from Admin Portal to create an inventory of phones.

You can then configure these phones to fit your organizational needs, assign them to specific Avaya Cloud Office™ users, or set them as common phones that everyone can use.

You can also assign Avaya Cloud Office Phone App to users without a physical deskphone.

Related links

[Adding a new phone to the phone system](#) on page 87

[Adding a new common phone](#) on page 88

[Registering an existing J100 series phone](#) on page 92

[Registering an existing SIP compatible phone](#) on page 91

[Assigning a phone to a user](#) on page 95

[Setting up and assigning a phone to a user](#) on page 94

[Managing user phone details](#) on page 95

Adding a new phone to the phone system

About this task

Add a new phone that you can later assign to a user. After you complete the order process, you can view the new phone in the Unassigned subtab and check the order status.

Note:

You can assign the new phones you order before receiving them.

Procedure

1. From the Admin Portal homepage, click **Phone System > Phones & Devices > Unassigned**.
2. Click **Add Device**.
3. On the Add Unassigned Phone window, on the Select Location tab, select a country.
4. Click **Next**.

5. On the Select Device tab, select the phone model.

The Recently Bought subtab displays the recently ordered phones. To view the full list of available phones, click **Desktop Phones**.

6. Specify the number of phones to add and click **Add**.

You can add multiple phone models to your order.

7. Scroll down and click **Next**.

8. If you have a cost center or centers, on the Cost Center Codes tab, in the **Select Cost Center** list next to the phone, select the cost center.

If you have multiple phones in your order, you can click **Split** and create phone groups to assign them to different cost centers.

9. Click **Next**.

10. If the Multi-site feature is enabled on your company account, on the Sites tab, in the **Select Site** list next to the phone, select the site.

If you have multiple phones in your order, you can click **Split** and create phone groups to assign them to different sites.

11. Click **Next**.

12. On the Add Shipping Info tab, under **Select Shipping Address**, select the shipping address.

13. Select the phone and click **Assign to Selected**.

14. Click **Next**.

15. On the Confirm tab, scroll down and select the check box to accept the terms and conditions.

16. Click **Next**.

17. To complete the order process, click **Done**.

You can view the new phone or phones on the Unassigned subtab.

Related links

[Assigning a phone to a user](#) on page 95

Adding a new common phone

About this task

Add a new common phone to the phone system that any Avaya Cloud Office™ user from any department can use. Users with assigned phones, or office users, can access their extensions and voicemail on a common phone after logging in to their profiles with their extension numbers and PIN codes.

When adding common phones to your phone system, you can use the available phones in your inventory or order new phones.

*** Note:**

- Common phones are available only on Premium and Ultimate subscription plans.
- Charges apply if you do not have enough licenses in your company account.

Procedure

1. From the Admin Portal homepage, click **Phone System > Phones & Devices > Common Area Phones**.

2. Click **Add Device**.

Avaya Cloud Office™ displays the Add Hot Desk Phones window.

3. In the **Qty** field, type the number of phones to add.

4. From the **Cost Center** list, select a cost center if applicable.

5. From the **Site** list, select a site if applicable.

6. Click **Select a Device**.

Avaya Cloud Office™ displays the Recently Bought tab listing recently bought phones.

7. **(Optional)** To view the list of all phones, click the **Desktop Phones** tab.

8. Select the phone model and click **Select**.

You can select to use the phones in your inventory if available.

After selecting, Avaya Cloud Office™ directs you back to the Add Hot Desk Phones tab.

9. Click **Add**.

Avaya Cloud Office™ displays the Order Summary section with details of your order.

10. **(Optional)** To add more phones, repeat steps 3 to 9.

11. Click **Next**.

12. On the Add Emergency Address tab, do one of the following:

- To select a preconfigured emergency address from the **Emergency Response Location** list, select the emergency address.
- To add a new address, click **New** and fill in the address details.

13. To add the emergency address to the phone, select the check box for the phone and click **Assign to Selected**.

14. Click **Next**.

If you are purchasing new phones, Avaya Cloud Office™ displays the Add Shipping Info tab.

If you are exclusively using the phones in your inventory, Avaya Cloud Office™ skips to the Confirm tab.

15. If you are purchasing new phones, on the Add Shipping Info tab, do the following:

a. From the **Select Shipping Address** list, select the shipping address.

You can edit the existing addresses or add new ones if necessary.

b. From the **Select Shipping Method** list, select the shipping method.

c. Select the check box for the phone and click **Assign to Selected**.

16. Click **Next**.

17. On the Confirm tab, scroll down and select the check box to accept the terms and conditions.

Avaya Cloud Office™ includes any charges relating to taxes and fees in the order details.

18. Click **Next**.

19. To complete the order process, scroll down and click **Done**.

You can view the new common phone or phones in the Common Area Phones subtab.

Related links

[Converting a phone into a common phone](#) on page 99

Adding a phone entry to the phone system

About this task

Add a phone entry that you can later use to register an existing SIP-compatible phone to the Avaya Cloud Office™ phone system. Avaya Cloud Office Service Web automatically assigns the name Existing Phone to each phone entry you add. You can view these phone entries on the Unassigned subtab.

* Note:

21 You can allocate phone numbers to these phone entries and assign them to users without
22 registering deskphones. Avaya Cloud Office Service Web moves assigned phone entries to
23 the User Phones subtab.

+ Tip:

24 Giving descriptive names to the phone entries you add helps distinguish them quickly.

Procedure

1. From the Admin Portal homepage, click **Phone System > Phones & Devices > Unassigned**.

2. Click **Add Device**.

3. On the Add Unassigned Phone window, on the Select Location tab, select the location.

4. Click **Next**.

5. On the Select Device tab, click **Other Phones > Existing Phone**.
6. Specify the number of phones to add and click **Add**.
7. Scroll down and click **Next**.
8. If you have a cost center or centers, on the Cost Center Codes tab, in the **Select Cost Center** list next to the phone, select the cost center.
If you have multiple phones in your order, you can click **Split** and create phone groups to assign them to different cost centers.
9. Click **Next**.
10. If the Multi-site feature is enabled on your company account, on the Sites tab, in the **Select Site** list next to the phone, select the site.
If you have multiple phones in your order, you can click **Split** and create phone groups to assign them to different sites.
11. Click **Next**.
Avaya Cloud Office Service Web displays a confirmation banner and adds the phone entries to the Unassigned subtab, each named Existing Phone.

Next steps

Register a phone to the newly created phone entry.

Related links

- [Setting up and assigning a phone to a user](#) on page 94
- [Registering an existing SIP compatible phone](#) on page 91
- [Registering an existing SIP compatible phone](#) on page 91
- [Registering an existing J100 series phone](#) on page 92

Registering an existing SIP compatible phone

About this task

Register a SIP-compatible phone you own to the Avaya Cloud Office™ phone system using an available phone entry. Assigned and unassigned phone entries are found on the User Phones and the Unassigned subtabs, respectively.

You can also add new phone entries free of charge.

Note:

- The phone registration process differs depending on the brand and model of the phone. This procedure provides general directions for registering any SIP-compatible phone you own.

Before you begin

- Ensure that you have at least one phone entry without a registered phone. To verify whether a phone entry has a registered phone, check its serial number. If a phone entry does not have a serial number, it is available.
- Ensure that the deskphone you are registering is within your reach.

Procedure

1. From the Admin Portal homepage, click **Phone System > Phones & Devices**.
2. Click **Unassigned** or User Phones.
3. Click an available phone entry.

Giving a descriptive name to the phone entry you are using helps distinguish it quickly.

4. **(Optional)** To change the name of the phone entry, in the **Name** field, enter a name.
5. Click **Set Up and Provision**.

Avaya Cloud Office Service Web displays the Setup & Provisioning window.

6. On the Select Device tab, in the **Select your model to begin** field, type the model name for the phone and select it from the list.

If you cannot find the phone model, click **Set up manually using SIP** and follow the instructions on the Finish tab.

7. Click **Next**.
8. On the Provisioning tab, follow the instructions for your phone model.
9. Click **Next**.
10. On the Finish tab, from the **Outbound Proxy** list, select the outbound proxy according to the location of the phone.
11. Click **Done**.

Avaya Cloud Office Service Web registers the phone on the selected phone entry.

Related links

[Setting up and assigning a phone to a user](#) on page 94

[Registering an existing J100 series phone](#) on page 92

Registering an existing J100 series phone

About this task

Register a J100 series phone you own to the Avaya Cloud Office™ phone system using an available phone entry. Assigned and unassigned phone entries are found on the User Phones and the Unassigned subtabs, respectively.

You can also add new phone entries free of charge.

Before you begin

- Ensure that you have at least one phone entry without a registered phone. To verify whether a phone entry has a registered phone, check its serial number. If a phone entry does not have a serial number, it is available.
- Ensure that the deskphone you are registering is within your reach.
- Obtain the administrator password for the phone. The default administrator password is 27238. If you do not know the password, contact [Avaya Support](#).
- Obtain the alphanumeric MAC address of the phone. On J100 series phones, the MAC address is located underneath the phone.

Procedure

1. From the Admin Portal homepage, navigate to **Phone System > Phones & Devices**.
2. Click **Unassigned** or **User Phones**.
3. Click an available phone entry.
Giving a descriptive name to the phone entry you are using helps distinguish it quickly.
4. **(Optional)** To change the name of the phone entry, in the **Name** field, enter a name.
5. Click **Set Up and Provision**.
Avaya Cloud Office Service Web displays the Setup & Provisioning window.
6. On the Select Device tab, in the **Select your model to begin** field, type the model name for the phone and select it from the list.
7. Click **Next**.
Avaya Cloud Office Service Web displays the Provisioning tab, where you can see the instructions for the phone model.
8. On the J100 series phone you are registering, press **Menu**.
9. Select **Administration**.
10. On the Administration screen, enter the administrator password.
11. Select **Reset to defaults > Reset**.
The phone resets to factory settings and reboots.
12. Back on Admin Portal, on the Provisioning tab, in the **MAC Address** field, enter the phone MAC address.
13. Click **Next**.
14. On the Finish tab, in the Enter PIN section, locate and note down the 8-digit enrollment code.
15. Click **Done**.
16. Back on the phone, after it reboots, on the auto-provisioning screen, select **Yes**.
The phone starts the auto-provisioning process.

17. In the **Enter enrollment code** field, enter the 8-digit enrollment code.

18. Select **Enter**.

Selecting **Enter** triggers a software update for the phone. The phone might reboot single or multiple times. After the update, Avaya Cloud Office Service Web registers the phone on the selected phone entry.

Related links

[Setting up and assigning a phone to a user](#) on page 94

Setting up and assigning a phone to a user

About this task

Allocate a phone number to an unassigned phone and assign this phone to a user. Avaya Cloud Office Service Web moves the assigned phones to the User Phones subtab.

Procedure

1. From the Admin Portal homepage, click **Phone System > Phones & Devices > Unassigned**.

2. Click the phone to assign.

Avaya Cloud Office Service Web displays the settings page for the selected phone.

3. Click **Set Up and Assign**.

Avaya Cloud Office Service Web displays the Assign unassigned phone window.

4. On the Select Location tab, select a location and click **Next**.

5. On the Select User tab, select a user and click **Next**.

6. On the Configure Phone tab, verify the phone, user, and license details and click **Next**.

7. On the Select Numbers tab, do one of the following:

- To select an unassigned phone number from the inventory, on the Number Inventory subtab, from the **Phone Number** list, select a phone number.
- To acquire a new phone number, on the New Number subtab, select a location and an area code for the number, select the check box next to the phone name, and click **Assign to Selected**.

8. Click **Next**.

9. On the Add Emergency Response Location tab, from the **Select Emergency Address** list, select the emergency location.

10. Click **Next**.

Avaya Cloud Office Service Web assigns the phone to the selected user and moves the phone entry to the User Phones subtab.

1 Related links

2 [Assigning a phone to a user](#) on page 95

3 Assigning a phone to a user**4 About this task**

5 Assign an already set-up phone to a user. To verify whether a phone is set up, check its phone
6 number. If a phone has an allocated phone number, it is set up.

7 Procedure

8 1. From the Admin Portal homepage, click **Phone System > Phones & Devices >**
9 **Unassigned**.

10 2. Click the phone to assign.

11 3. In the Assign to section, click **Edit User**.

12 Avaya Cloud Office Service Web displays the Select User window.

13 4. Select the user to assign the phone.

14 5. Click **Save**.

15 6. On the Emergency Response Location window, you can do one of the following:

- 16 • Select an organization-designated emergency location from the list.
- 17 • Add a new emergency location.

18 7. Click **Done**.

19 8. Click **Save**.

20 Avaya Cloud Office Service Web assigns the phone to the selected user.

21 Related links

22 [Setting up and assigning a phone to a user](#) on page 94

23 Managing user phone details**24 About this task**

25 You can manage user phones and change their details. Users with the following roles can change
26 the device-specific settings:

- 27 • Phone System Admin
- 28 • Super Admin
- 29 • Custom roles with access to the phone menus

30 Phone system settings are unique for each phone.

! Important:

- 1 Changes to a phone are critical and affect the system functionality. Ensure that you select the
- 2 correct device before making any changes.

Procedure

1. From the Admin Portal homepage, click **Phone System > Phones & Devices > User Phones**.

2. Click the phone to manage.

Avaya Cloud Office Service Web displays the settings page for the selected phone.

3. To replace the phone, click **Change Phone** and select one of the following:

- **Avaya Cloud Phone Desktop App:** To use the desktop phone app.
- **Existing Phone:** To select a phone from your unassigned devices.
- **New Phone:** To purchase a new desk phone.
- **Bring Your Own Device:** To use an existing SIP phone.

4. To change the name of the phone, in the **Name** field, make your edits.

5. To reassign the device to a different user, click **Edit User** and select a user from the list.

6. To view the phone number details, next to the phone number, click **View** and confirm redirection to the Phone Numbers subtab.

7. To change the phone number, click **Edit Number**.

8. To remove the phone number, click **Remove Line** and then **Confirm**.

You can delete the number permanently or keep it in your inventory. The license is added to the available licenses on the Licenses & Inventory page.

9. To configure network bandwidth settings for your calls, from the **Data Usage** list, select one of the following:

- **High:** Provides better sound quality but can cause interruptions during a call when high bandwidth is not available.

When you select high bandwidth quality, you can also enable the **Use HD Voice if possible** check box.

- **Low:** Provides lower sound quality but ensures no interruptions during a call.

10. To edit the emergency address, in the Emergency Response Location section, click **Edit Location**.

11. Click **Save**.

Related links

[Unassigning a user's phone](#) on page 97

[Swapping phones between users](#) on page 97

[Removing the primary number of a phone](#) on page 85

[Configuring emergency response location settings for a phone](#) on page 98

Unassigning a user's phone

About this task

Unassign a user's phone so you can later assign it to another user or convert it to a common phone. Avaya Cloud Office Service Web moves the user's original phone to the Unassigned subtab and assigns Avaya Cloud Office Phone App to that user.

Procedure

1. From the Admin Portal homepage, click **Phone System > Phones & Devices > User Phones**.

2. Click the phone to unassign.

You can type the name of a user in the **Search** field to find the user's phone.

After clicking, Avaya Cloud Office Service Web displays the settings page for the selected phone.

3. In the Device section, click **Change Phone**.

4. On the Change Phone window, select **Avaya Cloud Phone Desktop App**.

5. Click **Next**.

Avaya Cloud Office Service Web displays the Select Avaya Cloud Phone Desktop App window.

6. On the Emergency Calls tab, select the check box to accept the terms and conditions and click **Next**.

7. On the Add Emergency Response Location tab, from the **Emergency Response Location** list, select an emergency address.

You can also add a new emergency address.

8. Click **Next**.

9. On the Confirm tab, verify the change and click **Done**.

Avaya Cloud Office Service Web replaces the user's phone with Avaya Cloud Office Phone App and redirects you to the settings page for the unassigned phone.

Related links

[Swapping phones between users](#) on page 97

Swapping phones between users

About this task

Swap phones between two users. When you swap phones, Avaya Cloud Office™ does not change the phone numbers of users, so users keep their numbers. Phone names are also not updated. When idle, the phone will contact Avaya and update its configuration.

Procedure

1. From the Admin Portal homepage, click **Phone System > Phones & Devices > User Phones**.
2. Click the phone to swap.

Avaya Cloud Office Service Web displays the settings page for the selected phone.
3. In the Device section, click **Change Phone**.
4. On the Change Phone window, select **Existing Phone**.
5. Click **Next**.
6. On the Select Device tab, select the phone to swap with.
7. Scroll down and click **Next**.
8. On the Confirmation tab, click **Swap**.
9. On the Confirmation window, click **OK**.

Configuring emergency response location settings for a phone

About this task

Configure emergency response location settings for phones to direct first responders during an emergency.

Important:

- 18 Users cannot make outbound calls without a configured emergency response location.

Procedure

1. From the Admin Portal homepage, click **Phone System > Phones & Devices > User Phones**.
2. Select the phone to configure.
3. Under the Emergency Response Location section, click **Edit Location**.
4. On the Emergency Response Location window, you can do one of the following:
 - Select an organization-designated emergency location from the list.
 - Add a new emergency location.
5. Click **Done**.
6. Click **Save**.

Converting a phone into a common phone

About this task

Convert a phone into a common phone that any Avaya Cloud Office™ user from any department can use. Users with assigned phones, or office users, can log in to a common phone with their extension numbers and PIN codes to access their extensions and voicemail.

Common phones are available only on Premium and Ultimate subscription plans.

Before you begin

- Ensure that the phone you are converting is registered to the Avaya Cloud Office™ phone system. If the phone is registered, you can use its serial number to find it on the User Phones or Unassigned subtabs.
- Ensure that the phone is not assigned to any user or unassigned extension.

Procedure

1. From the Admin Portal homepage, click **Phone System > Phones & Devices > Unassigned**.
2. Click the unassigned phone to convert.
3. On the phone page, scroll down and click **Convert to Hot Desk Phone**.
Avaya Cloud Office™ displays the Convert to Hot Desk Phone window.
4. **(Optional)** On the Configure Phone tab, in the **Phone Nickname** field, type the new phone name.
5. Select a cost center, if applicable.
6. Click **Next**.
7. On the Add Emergency Address tab, do one of the following:
 - Select the emergency address.
 - Add a new address.
8. Click **Next**.
9. On the Confirm tab, scroll down and select that you accept the terms and conditions.
Avaya Cloud Office™ includes any charges relating to taxes and fees in the order details.
10. Click **Next**.
11. To complete the order process, scroll down and click **Done**.

You can view the new common phone in the Common Area Phones list.

Chapter 12: Announcement-only, message-only, and limited extensions

Announcement-only extensions

An announcement-only extension on Avaya Cloud Office™ serves to deliver announcements to callers. In addition to its external messaging capabilities, announcement-only extensions are also useful for sharing internal updates, such as company news, upcoming events, or holiday closure announcements.

Avaya Cloud Office™ provides the default greeting in the following format: Announcement. No one is available to take your call. Thank you for calling. Goodbye!. However, you can manage announcement greeting by creating a custom one with one of the following options:

- **Computer Microphone:** To record your message with your computer microphone. You can replay the recording before uploading.
- **Phone:** To record your message with your phone. After typing your phone number, Avaya Cloud Office™ calls you to record your custom message over the phone.
- **Importing:** To upload a .wav or .mp3 file from your computer.

You can associate different number types with announcement-only extensions, allowing external callers to access and listen to the announcements. The number types follow as:

- **Local Number:** A local number is a phone number linked to a certain area or place.
- **Toll-Free Number:** A toll-free number is a phone number that you can call from a landline without any cost to the caller.
- **Vanity Number:** A vanity number is a phone number, either local or toll-free, that uses the letters on a keypad to spell a word or name.

Related links

[Creating Announcement-Only Extensions](#) on page 101

[Managing an announcement-only extension](#) on page 101

[Adding numbers to an announcement-only extension](#) on page 102

[Deleting an announcement-only extension](#) on page 102

1 Creating Announcement-Only Extensions

2 About this task

3 This procedure outlines the steps to create an announcement-only extensions on Avaya Cloud
4 Office™. These extensions play recorded messages for callers. You can also use these extensions
5 to make internal announcements related to company news, upcoming events, or holiday closures.

! Important:

6 Select an extension number to follow the internal numbering plan.

7 Procedure

- 8 1. On the Admin Portal homepage, click **Phone System > Groups > Announcement-Only**
9 **Extensions**.
- 10 2. At the top-right corner, click **New Announcement-Only Extension**.
- 11 3. On the Add Announcement-Only Extension window, select the site and enter the details
12 into the extension name and extension number fields.
- 13 Avaya Cloud Office™ sends an email to the user managing the announcement-only
14 extension to activate the extension.
- 15 4. Click **Save**.

16 Related links

17 [Announcement-only extensions](#) on page 100

18 Managing an announcement-only extension

19 About this task

20 Configure announcement-only extension settings to edit your general and regional settings and
21 modify your announcement message.

22 Procedure

- 23 1. On the Admin Portal homepage, click **Phone System > Groups > Announcement-Only**
24 **Extensions**.
- 25 2. Click the announcement-only extension to configure.
- 26 3. To change the extension details, such as the extension name and number, do the
27 following:
 - 28 a. Click **Announcement-Only Extension Details**.
 - 29 b. On the General tab, configure the extension details as required.
- 30 4. To change the extension settings, such as the regional settings, do the following:
 - 31 a. On the Announcement-Only Extension tab, click **Settings**.
 - 32 b. Under the Regional Settings section, click **Edit**.

You can adjust the time zone, home country code, greetings language, time format, user language, and regional format.

- c. Under the Confirmation Message section, click **Edit**.

Enabling a confirmation message determines how long it stays visible on the screen after an action is done.

- d. Under the Site section, click **Edit**.

You can change the assigned site for your announcement-only extension.

5. To change the announcement message, do the following:

- a. Click **Announcement > Edit**.
- b. From the **Set Greeting** list, select **Custom**.
- c. Select the required option and add your message.
- d. Click **Done**.

Related links

[Announcement-only extensions](#) on page 100

Adding numbers to an announcement-only extension

About this task

You can apply local, toll-free, or vanity numbers to announcement-only extensions to enable external callers to listen to the announcements.

Procedure

1. On the Admin Portal homepage, click **Phone System > Groups > Announcement-Only Extensions**.
2. Select the announcement-only extension.
3. Click to expand **Direct Numbers** and click **Add Direct Number**.
4. From the **Number Type** list, select the appropriate number type.
5. Click **Next**.

Avaya Cloud Office Service Web assigns the select phone number to the announcement-only extension.

Related links

[Announcement-only extensions](#) on page 100

Deleting an announcement-only extension

About this task

Delete announcement-only extensions to deactivate them.

Procedure

1. On the Admin Portal homepage, click **Phone System > Groups > Announcement-Only Extensions**.
2. Select the announcement-only extension.
3. Under the Actions section, click ⋮.
4. Before deleting, disable the activated extension.
After you disable the activated extension, the Actions section displays the options to **Enable** and **Delete**.
5. Click **Delete**.
6. In the dialog box, click **Confirm**.

Related links

[Announcement-only extensions](#) on page 100

Message-only extensions

Message-only extensions serve the purpose of sending all calls they receive to their voicemail box. This way, Avaya Cloud Office Service Web admin portal can manage voicemail messages for specific extensions or groups in the organization.

Related links

[Managing Message-Only Extension Details](#) on page 103

[Assigning numbers to Message-Only Extensions](#) on page 104

[Configuring voicemail and notifications for message-only extensions](#) on page 105

[Deleting a message-only extension](#) on page 106

Managing Message-Only Extension Details

About this task

This procedure outlines the steps to configure the general and regional settings of message-only extension details.

Procedure

1. On the Admin Portal homepage, click **Phone System > Groups > Message-Only Extensions**.
2. In the Change Site section, select the extension you want to configure.
3. Click **Message-Only Extension Details** and expand the section.
4. On the **General** tab, enter the extension number, extension name, company name, and contact phone.

5. Click **Edit** to configure the record extension name.
6. In the contact phone field, enter your phone number to verify your identity.
7. Enter the email address and click **Send Invite**. Follow the instructions in the activation email to finish setting up the extension.
8. Click the check box to include the message-only extension in the company directory.
9. Click **Save**.
10. Click **Delete** to permanently remove the message-only extension. This action unassigns the licenses and returns them to your account for future use.
11. Click **Confirm**.
12. Click the **Settings** tab to configure the following settings:
 - a. Regional settings: Click **Edit** to configure time zone, home country code, greetings language, time format, user language, and regional format.
 - b. Site: Click **Edit** to select the company or test site.
 - c. Confirmation Message: Click **Edit** to enable the confirmation message and select its audio duration.

Related links

[Message-only extensions](#) on page 103

Assigning numbers to Message-Only Extensions

About this task

A message-only extension sends all incoming calls directly to voicemail. Admins with phone system permissions create a message-only extension in Admin Portal. You can assign local, toll-free, or vanity numbers to message-only extensions. A message-only extension uses an internal extension number to forward calls.

Procedure

1. On the Admin Portal home page, click **Phone System > Groups > Message-Only Extensions**.
2. In the Change Site section, select the extension you want to configure.
3. Click **Direct Numbers** and expand the section.
4. Click **Add Direct Number** to open the configuration window.
5. On the **Select Numbers** tab, select the location, number type, cost center, state/province, and area code.
6. On the **Numbers Available in your Number Inventory** tab, select the preferred numbers.
7. On the **Numbers Available from Avaya Cloud Office** tab, select the preferred numbers.
8. Click **Add Numbers**.
9. Click **Next**.

10. On the **Confirm Order** tab, select the check box to confirm you have reviewed the information.
11. Click **Next**.
12. On the **Order Confirmation** tab, verify the information and click **Done**.
13. In the Enable SMS for the numbers window, assign the numbers to the campaign registry to enable the SMS service.
14. Click the **Assign later** or **Assign now** button to activate the text messaging service.

Related links

[Message-only extensions](#) on page 103

Configuring voicemail and notifications for message-only extensions

About this task

You can set up email or text message notifications, modify your voicemail greeting, change your notification settings, and select a co-recipient.

Procedure

1. On the Admin Portal homepage, click **Phone System > Groups > Message-Only Extensions**.
2. Click the message-only extension to configure.
3. To change the voicemail greeting, click **Voicemail & Notifications** and do the following:
 - a. Click **Edit**.
 - b. From the **Set Greeting** list, select **Custom**.
 - c. Select the required option and add your message.
 - d. Click **Done**.

All callers hear this greeting before getting the option to leave a voice message.
4. To change the voicemail recipient, click **Voicemail & Notifications > Another extension** and do the following:
 - a. Click **Select extension**.
 - b. On the Select extension window, select the user from the list or type the name in the search field.
 - c. Click **Done**.
5. To change notification settings, click **Voicemail & Notifications > Settings** and do the following:
 - a. Click **Edit**.
 - b. Select the check box according to your preference.

You can type your email address or select carrier and type your phone number under Send Notifications to.

c. **(Optional)** To change the additional settings, click to expand the drop-down list at the top-right corner and then click **Advanced Settings**.

d. Click **Customize Notifications** under Actions.

e. Click the relevant check box and type your email.

6. To receive a voicemail transcript, toggle on the **Voicemail to text** switch.

7. To specify the users can access to the messages that the mailbox receives, click **Edit Co-recipients** and select a user from the list.

Related links

[Message-only extensions](#) on page 103

Deleting a message-only extension

About this task

Delete message-only extensions to deactivate them.

Procedure

1. On the Admin Portal home page, click **Phone System > Groups > Message-Only Extensions**.

2. Select the message-only extension.

3. Under the Actions section, click ⋮.

4. Before deleting, disable the activated extension.

After you disable the activated extension, the Actions section displays the options to **Enable** and **Delete**.

5. Click **Delete**.

6. In the dialog box, click **Confirm**.

Related links

[Message-only extensions](#) on page 103

Limited Extensions

Limited extensions are phones for shared spaces and are used by supervisors. These extensions have fewer features than standard ones. Administrators can create an extension with limited features available on Standard, Premium, or Ultimate Subscription plans.

Limited extensions have restrictions and do not support the following functionalities:

- Intercom Paging

- Voicemail
- Fax transmissions
- Desktop or Mobile Apps

You cannot swap digital lines between users connection and limited extensions. You can assign a virtual number to a limited extension. Limited extensions are used in conference rooms, and you cannot assign them to specific users.

Administrators enable outgoing international calls on a limited extension. Account administrators and users with admin permissions access the group menu items to create these extensions.

Related links

- [Creating a limited extension](#) on page 107
- [Configuring a limited extension](#) on page 108
- [Configuring an existing phone as a limited extension](#) on page 109
- [Configuring limited extension details](#) on page 109
- [Configuring limited extension phone and numbers](#) on page 110
- [Configuring a limited extension announcement and hold music](#) on page 110
- [Configuring limited extension outbound caller ID](#) on page 111

Creating a limited extension

About this task

Create a limited extension for common area phones. Admins can create limited extensions on Standard, Premium, or Ultimate plans.

When creating a limited extension, you can view the recently purchased devices and other devices available for purchase with relevant information, such as their type, price, and availability.

You can assign only desktop phones to a limited extension.

Procedure

1. On the Admin Portal home page, click **Phone System > Groups > Limited Extensions**.
2. At the top-right corner, click **New Limited Extension**.
Avaya Cloud Office™ displays the Add Limited Extensions window.
3. In the Add Limited Extensions window, select the location and click **Next**.
4. Select a location and type the quantity.
5. Select a state, area code, and number option, then click **Select a Device**.
6. To select a different device, click **Desktop Phones**.
7. To use an existing phone, click **Other Phones**.

After selecting the device, Avaya Cloud Office™ displays a window with additional details, including the device description and the link to a download datasheet.

8. Click the device and click **Select**.

9. To create an order, on the Add Limited Extensions tab, click **Add**.

10. In the order window, click **Next** and click **Done**.

Related links

[Limited Extensions](#) on page 106

Configuring a limited extension

About this task

Configure an available limited extension to change the settings, such as its number, name, and extension holder. You can also enable or disable international calling and set an emergency response location for a limited extension.

Procedure

1. On the Admin Portal home page, click **Phone System > Groups > Limited Extensions**.

2. Click the limited extension to configure.

3. On the Extension Info tab, type the extension number, extension name, and the email for the user to manage the extension.

Avaya Cloud Office™ sends an email to the user with the link to activate this extension.

4. **(Optional)** To allow calls to international numbers, select the **International Calling allowed** check box.

If you enable Automatic Call Recording, you can select inbound or outbound calls on this extension. When enabled, **International Calling allowed** displays the options to select.

5. On the Extension Info tab, under the Emergency Response Location section, click **Edit** and fill in the details.

You can set an emergency address for the device. However, you must assign the E911 address based on the current physical location of the device.

Important:

Users cannot make outbound calls without a configured emergency response location.

6. Read and accept the terms and conditions of E911 emergency calling restrictions.

7. On the Unassigned Limited Extension tab, click **Save & Enable**.

8. In the confirmation window, click **OK**.

Related links

[Limited Extensions](#) on page 106

1 Configuring an existing phone as a limited extension

2 About this task

3 The Phone tab shows a new device used for limited extensions. Also, you can set up an existing
4 phone to work as a limited extension. If you choose an existing phone when creating a limited
5 extension, you must configure it before use.

6 Procedure

- 7 1. On the Admin Portal home page, click **Phone System > Groups > Limited Extensions**.
- 8 2. Click the limited extension and click **Device & Numbers**.
- 9 3. To provision the desktop phone, click the **Phone** tab.
- 10 4. Click **Edit**.
- 11 5. In the Existing Phone section, click **Setup & Provision**.

12 Related links

13 [Limited Extensions](#) on page 106

14 Configuring limited extension details

15 About this task

16 After creating a limited extension, you can configure its regional settings, confirmation message
17 and apply a template.

18 You can only select the previously created templates for limited extensions.

19 Procedure

- 20 1. On the Admin Portal home page, click **Phone System > Groups > Limited Extensions**.
- 21 2. Click the limited extension to configure.
- 22 3. To change the extension details, on the extension tab, click to expand **Limited Extension**
23 **Details**.
- 24 4. On the General tab, configure the extension details.
- 25 5. To change the extension settings, click **Settings**.
- 26 6. To configure your default regional settings, in the **Regional Settings** field, click **Edit**.
27 You can adjust the time zone, home country code, greetings language, time format, user
28 language, and regional format.
- 29 7. To change the timeout for the confirmation message, in the **Confirmation Message** field,
30 click **Edit**.
31 The timeout is for the confirmation message you can see after making configuration
32 changes.
- 33 8. To select a template, click **Apply**.

1 Related links

2 [Limited Extensions](#) on page 106

3 Configuring limited extension phone and numbers

4 About this task

5 You can assign a phone number or a device to a limited extension after creating it. If an existing
6 phone is applied to the limited extension, you must configure it.

7 Procedure

- 8 1. On the Admin Portal home page, click **Phone System > Groups > Limited Extensions**.
- 9 2. Click the limited extension to configure.
- 10 3. To assign a phone number, on the extension tab, click **Device & Numbers**, and click **Add**
11 **Direct Number**.
- 12 4. From the **Number Type** list, select the appropriate number type and click **Next**.
13 Select between local, toll-free, and vanity numbers.
- 14 5. To view the details of the selected device, click the **Phone** tab.
15 You can configure the phone nickname, phone type, and number.
- 16 6. To configure an existing phone, click **Edit > Setup & Provision**.
- 17 7. Follow the instructions on the Setup & Provisioning window to activate the limited
18 extension phone.

19 Related links

20 [Limited Extensions](#) on page 106

21 Configuring a limited extension announcement and hold music

22 About this task

23 An incoming call rings for 20 seconds on the assigned device. If not answered, the caller can hear
24 an announcement and then gets disconnected.

25 You can create announcement greetings for unanswered calls or change the announcement
26 settings. The default greeting message is: "I'm sorry. No one is available to take your call. Thank
27 you for calling. Goodbye!".

28 Instead of using a greeting announcement, you can set music.

29 Procedure

- 30 1. On the Admin Portal home page, click **Phone System > Groups > Limited Extensions**.
- 31 2. Click the limited extension to configure.
- 32 3. Click **Announcement & Hold Music** and click **Edit**.

4. Under the Unavailable Greeting section, select one of the following options:
 - **Default:** To use the default greeting message.
 - **Custom:** To add a custom greeting message.
5. **(Optional)** To set a custom greeting, select the required option and add your message.
 - Record your custom greeting on the phone during a call from Avaya Cloud Office™.
 - Select to record on a computer microphone.
 - Import an audio file as your custom greeting.
6. To add music for the callers on hold, under the Hold Music section, select the **Enable** check box.
7. To set audio and select the music, click **Edit** and select between ring tones, music, or custom as your audio type.
8. Click **Done**.
9. On the Announcement & Hold Music tab, click **Save**.

Related links

[Limited Extensions](#) on page 106

Configuring limited extension outbound caller ID

About this task

The caller ID is the phone number displayed for outgoing calls. By default, the caller ID is set to the main company number. You can select a phone number after creating the limited extension.

You can set an alternate caller ID when calls are placed to toll-free numbers.

By default, Avaya Cloud Office™ displays the extension number of a limited extension when making internal calls.

Procedure

1. On the Admin Portal home page, click **Phone System > Groups > Limited Extensions**.
2. Click the limited extension to configure.
3. To set a primary caller ID for a limited extension, click **Outbound Caller ID**.
4. In the Existing Phone section, click **Edit**.
5. Select the number and click **Done**.
6. In the Alternate Caller ID section, click **Edit**.
7. Select the number and click **Done**.
8. To display the extension number for internal calls, under the For internal calls section, select the **Display my extension number** check box.

Related links

[Limited Extensions](#) on page 106

Chapter 13: Call group management

Configuring call flips

About this task

Call flip enables users to transfer a live call from one phone to another without interruption by pressing an assigned number.

Before you begin

Before using call flip, you have to add the phone numbers to transfer the calls.

Procedure

1. Click **Users > User List > Users with Extensions**.
2. Click the name of the user who requires a call flip.
You can search for the user in the **Search** field.
3. From the **Phone** drop-down, select **Call flip**.
4. In the Call flip window, you can do the following:
 - Change the flip number order: Drag and drop the phone numbers into your preferred order.
 - Unlink a number: Click **Unlink** in any listing to remove that number from the list.
5. Click **Save**.

Call forwarding for non-working hours

About this task

Call forwarding enables users to forward the calls after hours.

Procedure

1. Click **Users > User List > Users with Extensions**.
2. Click the name of the user.
You can search for the user in the **Search** field.

3. From the **Phone** drop-down, select **Incoming call rules**.
 4. Click **Forward all calls** toggle to turn it on.
 5. From the **Incoming calls** drop-down, select **Forward all calls**.
 6. To forward the call to an internal extension, type the name or extension of the user.
 7. To forward the call to an external number, click the **Number** tab and enter the phone number.
 8. Select the user or number.
 9. Click **Add schedule**, then use the date and time selectors to set your call forwarding schedule.
- If you are toggling **Forward all calls** on or off, you can skip adding a schedule.
10. Click **Save**.
 11. Under **Incoming call rules**, My work day section, click **After hours** to expand.
 12. In the Edit schedule window, click the existing work schedule to modify it. Then use the date and time selectors to set your call forwarding schedule.
 13. Click **Save**.

Call forwarding for working hours

About this task

Call forwarding enables users to forward the calls while they are out of the office.

Procedure

1. Click **Users > User List > Users with Extensions**.
 2. Click the name of the user.
- You can search for the user in the **Search** field.
3. From the **Phone** drop-down, select **Incoming call rules**.
 4. Click **Forward all calls** toggle to turn it on.
 5. From the **Incoming calls** drop-down, select **Forward all calls**.
 6. To forward the call to an internal extension, type the name or extension of the user.
 7. To forward the call to an external number, click the **Number** tab and enter the phone number.
 8. Select the user or number.
 9. Click **Add schedule**, then use the date and time selectors to set your call forwarding schedule.

If you are toggling **Forward all calls** on or off, you can skip adding a schedule.

10. Click **Save**.

11. Under **Incoming call rules**, My work day section, click **Work hours** to expand.

12. In the Edit schedule window, click the existing work schedule to modify it. Then use the date and time selectors to set your call forwarding schedule.

13. Click **Save**.

Configuring custom rules for call forwarding

About this task

Custom rules define special routing that applies to specific callers, holidays, or specific times of the day.

Procedure

1. Click **Users > User List > Users with Extensions**.

2. Click the name of the user whose custom rule you want to set up.

You can search for the user in the **Search** field.

3. From the **Phone** drop-down, select **Incoming call rules**.

4. Click **+ Add Rule**.

If you want to route your calls based on a weekly work and after-hours schedule, click **After hours**, then click **Next** and proceed to step 10.

5. Click **Create a custom rule** to route your calls based on date or time, incoming caller ID, or dialed number.

6. Enter a name for your rule.

7. Click **Next**.

8. In the Who should be included in [Rule Name]? window, set the rule conditions:

a. Click **Add a contact or phone number** to apply this rule when the incoming caller ID matches a specific phone number, contact, or extension.

b. Click **Add a phone number** to apply this rule when a caller dials one or more specific phone numbers.

c. Click **Add schedule** to apply this rule during specific times of day or on specific dates.

9. Click **Next**.

10. In the How should incoming calls be routed during custom test? window, click the **Incoming calls** drop-down to select how calls are handled when your specified conditions are met.
 - a. Ring devices: Calls will ring your apps and physical phones.
 - b. Send to voicemail: Calls will route to a voicemail box.
 - c. Forward the call: Calls will forward to an extension or phone number.
 - d. Play announcement: Plays a prerecorded message, then ends the call.
11. Click **Next**.
12. Verify the accuracy of your rule and click **Done**.

Managing calls

Avaya Cloud Office Service Web provides various features for handling incoming calls. You can perform the following actions:

- Call forwarding during non-working hours
- Call forwarding during working hours
- Flip a call
- Park a call
- Create and manage ring groups
- Receive paging calls
- Monitor and delegate calls
- Answer calls from shared lines

Ring Group

A Ring Group is a collective unit of phone numbers within the call handling and forwarding settings of a user extension that rings simultaneously. A ring group enables you to configure two or more devices or numbers to ring simultaneously for the same duration. Ring groups can be created for working and non-working hours. Within the ring group, you can ring in order or ring all together. Additionally, you can deactivate the ring group when it is not needed.

Creating a ring group

About this task

A ring group enables you to configure two or more devices or numbers to ring simultaneously for the same duration.

Procedure

1. Click **Users > User List > Users with Extensions**.
2. Click the name of the user whose custom rule you want to set up.
You can search for the user in the **Search** field.
3. From the **Phone** drop-down, select **Incoming call rules**.
4. Under **Incoming call rules**, My work day section, click **Work hours** to expand.
5. Scroll to **Ring settings**.
6. In the Ring settings window, click to the far right of **How do you want your devices to ring?**, **Ring all together** or **Ring in order**.
 - When **Ring all together** is selected, all devices ring together. You can adjust the ring durations of each device individually.
 - When **Ring in order** is selected, your devices will ring in sequential order. Drag and drop to change the ring order. Tap to change ring durations by device.
7. Click **Ring groups**.
8. Select the boxes next to the names of the members you want to add to your ring group, then click **Group**.
9. Click **Done**.

Updating a ring group

About this task

A ring group enables you to configure two or more devices or numbers to ring simultaneously for the same duration. After a ring group is created, you can deactivate or activate the ring group when necessary. Additionally, you can remove devices or numbers from a ring group without deleting the entire group.

Before you begin

Create a ring group.

Procedure

1. Click **Users > User List > Users with Extensions**.
2. Click the name of the user whose custom rule you want to set up.
You can search for the user in the **Search** field.
3. From the **Phone** drop-down, select **Incoming call rules**.
4. Under **Incoming call rules**, My work day section, click **Work hours** to expand.
5. Scroll to **Ring settings**.
6. To activate a ring group, turn on the toggle next to the preferred ring group.
7. To deactivate a ring group, turn off the toggle next to the preferred ring group.

8. To remove devices or numbers from a ring group without removing the entire ring group, click the device or number to remove, and click **Delete**.
9. Click **Save**.

Call Pickup

Administrators can configure call pickup settings for users who belong to a group. By configuring call pickup, users can answer incoming calls on behalf of a colleague who is unavailable to answer calls.

Group Pickup

Users who work in teams and monitor each other's phones can answer incoming calls for a group of colleagues. Administrators can configure the Group Pickup feature for a group of colleagues who are in the same team but are located at different geographical locations.

Directed Pickup

Administrators can configure Directed Pickup for a group of users, so that users can answer calls meant for other members in the group from their own phones. Setting up Directed Pickup reduces the number of calls that would otherwise go to voicemail when a user is unavailable to answer the call.

Related links

- [Setting user permissions to pick up calls for other users](#) on page 117
- [Setting up a Call Pickup group](#) on page 118
- [Configuring a directed call pickup group.](#) on page 119

Setting user permissions to pick up calls for other users

About this task

Administrators can modify presence settings to configure Call Pickup settings for users. A status indicator lights on Presence-capable phones to display which users are available, busy, or on hold. An authorized user can then decide how to handle an incoming call.

Incoming calls display destination information, such as a user's extension, on the Avaya Cloud Office™ application or deskphone. Users can use the Pickup icon in the application or Call Pickup button on a deskphone to answer an incoming call.

In the following procedure, create a scenario in which you can configure Call Pickup permissions for a user named Susan Gray. When Susan Gray is unavailable to answer incoming calls, the assigned colleague, Anthony Franco can answer the calls meant for Susan.

Procedure

1. From the Admin Portal homepage, navigate to **Users > User List > Users with Extensions**.
2. To modify a user's permission settings, type the name of the user in the **Search** field and click the user name in the search results.

- 1 In this example, type `Susan Gray` in the **Search** field and click the name **Susan Gray**.
- 2 3. Expand the **Devices & Numbers** tab and click **Presence** from the **Phones** menu.
- 3 4. On the Presence window, click the **Permissions** tab.
- 4 5. From the **When on a call, share my details with** options, select **Only users that are**
- 5 **permitted to answer my calls**.
- 6 6. From the user list, select **Antony Franco**.
- 7 7. Scroll down and click **Save** and return to the Users with Extensions page.
- 8 8. Search for and select the user **Antony Franco**.
- 9 9. Expand the **Devices & Numbers** tab and click **Presence** from the **Phones** menu.
- 10 10. On the Presence window, select the **Ring my phone when any user I am monitoring**
- 11 **rings** and **Enable me to pick up a monitored line on hold** options.
- 12 11. To assign Susan Gray's extension to a key on Anthony's phone, under **Actions**, click **:**,
- 13 and select **Assign Extension**.
- 14 12. Search for and select **Susan Gray**, and click **Assign**.
- 15 13. Click **Save**.
- 16 The phones are rebooted for the changes to take effect. If a call is in progress, the phones
- 17 are rebooted after the call is completed.

18 Related links

19 [Call Pickup](#) on page 117

20 Setting up a Call Pickup group

21 About this task

22 Group call pickup enables group members to answer each other's calls from their own phones.

23 When a group pickup member receives a call that rings for longer than the set alert time, other
24 group members receive a call notification. The notification shows the incoming caller ID and the
25 group member receiving it. Members can answer the call by pressing the pickup key on their
26 phone.

27 Procedure

- 28 1. Sign in to the Admin Portal..
- 29 2. Click **Phone System > Groups > Call Pickup**..
- 30 3. Under the **Group Pickup** tab, click **New Group Call Pickup**.
- 31 4. In the Add Group Call Pickup window, enter the name for the group.
- 32 5. From the **Site** list, select the required site.

33 You can also search for the required site.

6. From the **Alert Timer** list, select a duration. The group members are notified after this duration.

7. Click **Next**.

The Select Members tab is displayed.

8. Select the members to be added in this call pickup group.

You can also search for the members in all the available sites.

9. Click **Save**.

Related links

[Call Pickup](#) on page 117

Configuring a directed call pickup group.

About this task

The direct call pickup group enables group members to answer each other's calls from their own phones.

When a group member receives a call, other group members can answer the call by dialing the pickup code followed by the ringing extension.

Procedure

1. Sign in to the Admin Portal..

2. Click **Phone System > Groups > Call Pickup**..

3. Under the **Directed Pickup** tab, click **New Directed Call Pickup**.

4. In the Add Directed Call Pickup window, enter the name for the group.

5. From the **Site** list, select the required site.

You can also search for the required site.

6. Click **Next**.

The Select Members tab is displayed.

7. Select the members to be added in this directed call pickup group.

You can also search for the members in all the available sites.

8. Click **Save**.

Related links

[Call Pickup](#) on page 117

Call Parking

Call Parking is a feature that enables users in the same call park group to park a call in a shared park location so another authorized user can retrieve it later from a different device.

Administrators can create private call park locations that is visible to members of the same group. The call park locations are not tied to individuals allowing flexibility in retrieval. Each park location can be assigned to a group specifying users who can park calls for each other on a dedicated extension.

A maximum of 100 call park locations can be configured on an Avaya Cloud Office solution. Parked location keys are automatically added to all allocated devices of members of the same call park group.

Related links

[Creating a Call Park Location](#) on page 120

[Adding Users to a Call Park Location Group](#) on page 121

[Enabling Call Park Location for a group](#) on page 121

[Managing Call Park Location](#) on page 122

Creating a Call Park Location

About this task

You can create a park location group with a name, extension number, required presence key, and members to park and retrieve calls. You can add up to 100 park location groups.

Procedure

1. Log in to Admin Portal.
2. Click **Phone System > Groups > Park Locations**.
3. In the **Park Locations** tab, click **New Park Location**.
4. In the Add Park Location window, enter the name for the group and extension number.
5. From the **Site** list, select the required site.

You can also search for the required site.

6. Click **Save**.

A confirmation window is displayed.

7. In the confirmation window, click **Yes** to add users who can park phone calls on this extension. Otherwise, click **No, I will do it later**.

8. If you select **Yes**, the Add Members window is displayed. Select the names of the users you want to add, then click **Add**.

Note:

- 33 All members must be added to the park location if they belong to a ring group.

The Park Location Phone Key window is displayed.

9. If you select **No** in the confirmation window, you can add users to the park location group later.
10. In the Park Location Phone Key window, click **Yes** to automatically add the park location key to member phones.
11. Click **No** if you want to add the key manually.

Related links

[Call Parking](#) on page 120

Adding Users to a Call Park Location Group

Procedure

1. Log in to Admin Portal.
2. Click **Phone System > Groups > Park Locations**.
3. Click the park location group to which you want to add users.
4. In the **Location Members** section, click **Add member**.
5. Select the names of the users to add and then click **Add**.

* Note:

- 15 If users belong to a ring group, you must add all ring group members to the park
- 16 location.

The Park Location Phone Key window is displayed.

6. On the Park Location Phone Key window, click **Yes** to automatically add the key to member phones.
7. Click **No** to add the key manually.

Related links

[Call Parking](#) on page 120

Enabling Call Park Location for a group

Procedure

1. Log in to Admin Portal.
2. Click **Phone System > Groups > Park Locations**.
3. Click  corresponding to the name of the park location group to enable.
4. Click **Enable**.

Related links

[Call Parking](#) on page 120

1 Managing Call Park Location

2 About this task

3 You can manage call park locations by accessing and configuring park locations from the admin
4 portal.

5 Procedure

6 1. Log in to Admin Portal.

7 2. Click **Phone System > Groups > Park Locations**.

8 You can see a list of all groups with their status and extensions.

9 3. Click the park location group you want to configure

10 4. Click **Park Location Details**.

11 5. To change the **Extension Number** and **Group Name**, delete the number or name, then
12 enter the correct information in the field.

13 6. Click **Save**.

14 7. To disable the group, click **Disable** below **Status**.

15 A confirmation window is displayed.

16 8. Click **Disable**.

17 Related links

18 [Call Parking](#) on page 120

19 Paging Only groups

20 A paging group in Avaya Cloud Office is a collection of twenty-five paging devices and
21 deskphones. It can receive a paging call to help a business make real-time announcements to
22 multiple deskphones and overhead paging devices.

23 Paging is a commonly required function in hospitals, shops, and warehouses. Once created,
24 a paging group enables businesses to send realtime, one-way broadcasts through multiple
25 deskphones and overhead paging devices.

26 For example, a warehouse uses a paging group to notify colleagues about the arrival of a delivery
27 truck, all without requiring anyone to pick up the phone.

28 Creating a Paging Only group

29 About this task

30 You can use Page groups to make real-time announcements to deskphones and overhead paging
31 devices. To assign an existing **Paging Only** group to a site, follow the steps from the service web
32 tab home page.

Procedure

1. Log in to **Admin Portal**.
 2. Click **Groups > Manage Groups**.
 3. Click the **Phone System** tab.
 4. Click **Groups > Paging Only**.
 5. Click **New Paging Only** to create a new paging group.
 6. Enter a group name in the **Group Name** field.
 7. In the **Extension Number** field, accept the incremental number offered or choose a unique number, and click **Save**.
- A dialog box is displayed to confirm the successful addition of the new group. It also offers an option to configure paging-related settings.
8. Click **Yes** to configure the settings.

Configuring a Paging Only group

About this task

After you add the group and the paging feature is active, configure the paging-related settings.

Procedure

1. Expand **Paging**.
 2. Click **Devices that receive pages for this group > Add device to group**.
- A pop-up window is displayed to add a device to the group with multiple device options.
3. Select the type of device to add, and click **Continue**.
 4. From the list of available devices, select the required devices and click **Add** to add them to your group. The selected devices or phones have the auto-answer in speaker mode feature.
 5. Click the **Members allowed to page this group** tab, and select or search for the users to add. The added members can page this group. There is no limit to the number of users permitted to use this feature.
 6. Click **Add**.
- The configuration is completed.

Disabling a Paging Only group

About this task

This procedure provides an overview of the existing **Paging Only** groups and outlines the steps to disable them.

Procedure

1. Log in to **Admin Portal**.
2. Click **Groups > Manage Groups**.
3. Click the **Phone System** tab.
4. Click **Groups > Paging Only**.
5. Select the checkbox for the paging only group to be disabled, and click the hamburger menu under the **Actions** tab.
6. Click **Disable**.

A dialog box is displayed to confirm the disabling of the selected group.

7. Click **Disable**.

Deleting a Paging Only group

About this task

This procedure outlines the steps to delete the **Paging Only** group. You can delete a group if it is no longer needed. Deleted groups cannot be restored.

Before you begin

Disable the **Paging Only** group to delete.

Procedure

1. Select the group to delete.
 2. Click the **Actions > hamburger** menu.
 3. Click **Disable**.
- A dialog box is displayed to confirm the disabling action.
4. Click **Disable**.

The selected group is disabled.

Call Monitoring

Call Monitoring

The call monitoring feature enables authorized users to monitor and access other user's calls in real time. The administrators provide advanced access to the phone calls of the team with clients by creating core monitoring groups on Avaya Cloud Office Desktop App. The call monitoring feature provides the following:

- Training and coaching.
- Question and answer tools for supervisors or other members of the management team.

- Improving performance and productivity.

Creating call monitoring

About this task

The call monitoring features are activated by pressing the following buttons on your desktop phone:

Button	Description
*80	Monitor the call.
*81	Talk to the extension you are monitoring (whisper/coach).
*82	Enter the call so all parties can hear you (barge-in).
*83	Gain control of the call by disconnecting the extension you are monitoring (take over).

Before you begin

To monitor the users, add the monitor user extensions to the presence list. This list is automatically synchronized with the Head-Up Display (HUD) in the desktop app. Follow the steps to create call monitoring groups.

Procedure

1. Log in to **Admin Portal**.
 2. Select **Manage Groups > Phone System > Groups > Call Queues**.
 3. Under **Call Queues**, to create a call monitoring group for Sales, click **Call Monitoring > New Call Monitoring**.
 4. In the **Call Monitoring Group** pop-up window, under the **Define Group Name** tab, add a title to the group of extensions to monitor the calls, then click **Next**.
 5. In the **Select users that can monitor** tab, select the checkbox next to the name of each user to enable them to monitor calls.
 - a. To select all users, select the checkbox next to **Name**.
 - b. To search for users, use the search field.
 6. After adding users to monitor calls, click **Next**.
 7. In the **Select users that can be monitored** tab, select the checkbox next to the name of each user to monitor their calls by the users you selected in the previous step. To select all users, select the checkbox next to the **Name** tab.
 8. Click **Save**.
 9. Click the new monitoring group created, and open the **Group members** dialog to add more users to monitor.
- The service web generates an email that is sent to the users to inform them that they are added to the call monitoring group, along with the list.

10. Return to the call monitoring menu, and under the **Actions** tab, for the new monitoring group created, click the drop-down menu to show all members of the group.

Configuring call monitoring

About this task

This procedure outlines the steps to add and configure the users to monitor the calls. Only the users with extensions are to be added to the presence list.

Procedure

1. Log in to **Admin Portal**.
2. Select **Users > User list > Users with Extensions**.
3. Select the users to add to the monitored users to their **presence** list, and open the user dialog.
4. Click the **Phones & Numbers** tab, and click **Presence**.
The **Presence** dialog box is displayed.
5. In the **Appearance** tab, do the following:
 - a. Enable phone selection for monitored users when an incoming call is detected.
 - b. Enable users to pick up a held call from a monitored extension.
6. Select the key number to add a monitored user by clicking the three dots under the **Action** tab.
7. Select **Assign Extension**.
8. In the **Assign Extension** dialog box, search for the user to be assigned.
9. Select the box next to the name of the user to be added, click **Assign**, and then click **Save**.
10. Click **Yes** to confirm the reboot attention screen.

Result

The deskphone is rebooted to reflect the changes made and to complete the configuration for the call monitoring process.

Shared lines

Shared lines

The **Shared Lines** feature enables incoming calls to be efficiently distributed within a specific group. It also enables calls made to one phone number to be answered by up to 16 phones within a designated group. The answered calls can be transferred to other phones sharing the same phone number. The call can be placed on hold and then picked up from another phone. This feature is used to reach a person on multiple phones without requiring call transfers.

1 Creating a Shared Line

2 About this task

3 A shared line enables incoming calls to be distributed within the selected groups. The answered
4 calls are transferred to the assigned and inventory phones sharing the same phone number. This
5 procedure outlines the steps to create a shared line.

6 Procedure

- 7 1. Log in to **Admin Portal** as an administrator.
- 8 2. Click **Phone System > Groups > Delegated Lines**.
- 9 3. Click **New Delegated Line**.
- 10 4. In the **Setup** tab, click **Domestic** or **International** under **Select a Location**.
- 11 5. Enter the information required under **Group Details**.
- 12 6. Click **Next**.
- 13 7. In the **Add Lines** tab, select from the existing numbers under **Number Inventory**, or go to
14 the **New Number** tab to add a new number.
- 15 8. Click **Add to Group** after selecting or adding a new phone number, then click **Next**.
- 16 9. In the **Add Phones** tab, select one of the following devices to add to the group:
 - 17 a. **Order new phone**: Click **Recently Bought** to select a purchased device again, or
18 click **Desktop phone** to choose other devices.
 - 19 b. **Assigned user phones**: Select a user with an assigned deskphone.
 - 20 c. **Inventory phones**: Select from your existing devices.
- 21 10. Click **Next**.
- 22 11. Select your Emergency Response Location, or click **New** to add a new address, then click
23 **Next**.
- 24 12. In the **Add Shipping Info** tab, read and select the checkbox to acknowledge the
25 information. Click **Next**.
- 26 13. Check the summary of the charges and credits, then click **Print** to have a copy of your
27 order confirmation or click **Done** to place the order and exit.

28 Result

29 An email is sent to your Shared Line Group Manager. The assigned Shared Line Group Manager
30 can click the links to continue setting up the shared line.

31 Configuring a Shared Line

32 About this task

33 Configuring a shared line enables incoming calls to be distributed to the selected extension
34 number within groups. Additional features such as call blocking, greeting messages, and message
35 duration are also added. This procedure outlines the steps to configure a shared line.

Procedure

1. Log in to **Admin Portal** as an administrator.
2. Click **Phone System > Groups > Shared Lines**.
3. Click the **New Shared Line** group created.
4. Click **Shared Line Details**.
5. Update the following information in the **Shared Line Details** under the **General** tab:

- a. Extension Number
- b. Group Name
- c. Manager Email
- d. Welcome email invite
- e. Group Name Record
- f. Include Shared Line in Company Directory

You can delete the shared line group in this section.

6. Update the following under the **Settings** tab:
 - a. Regional Settings
 - b. Site
 - c. Confirmation Message length
 - d. Schedule
 - e. Shared Lines Devices
7. Add local, toll-free, or vanity direct numbers in the shared line extension based on location and cost center in the **Direct Numbers** tab.
8. Select the **Greeting & Hold Music** tab, and update the options under **Work hours**.
9. Click **Edit** under the following options to change the settings.
 - a. **Shared Line Greeting**: Enable callers to hear a group-wide greeting before connecting to a shared line.
 - b. **Audio While Connecting**: Enable callers to hear selected music while they are connecting to the extension.
 - c. **Hold Music**: Enable callers to hear music while on hold.
10. Update blocked call settings under the **Blocked calls** tab.
11. Click **Save**.

Update the settings for call handling during and after work hours. The custom call handling rules can also be set up for the shared line.
12. Click the **Work hours** tab.

13. In the **Incoming calls** tab, configure to route a call when all lines are busy. Send it to voicemail, play an announcement, or forward it to another extension.
 - a. In the **Devices ring for** tab, select a duration from the dropdown for a caller to wait before forwarding the call to another device.
 - b. In the **Missed calls** tab, set the preference to handle calls when all lines are busy or the caller reaches the maximum waiting time.
 - c. Click **Set voicemail greeting for work hours** to create a greeting.
 - d. Set up an announcement greeting to play a message to the caller and then end the call.
 - e. Click **Select extension** to forward the call to a selected extension.
14. Click **Save**.
15. Click the **Outbound Caller ID** dropdown.
16. Configure the outbound caller ID for the shared line group or the individual lines within the group.
17. Click **Outgoing Call Displayed as**.
18. From the dropdown list, select Group or Individual Lines.
19. Select Group and click **Edit** to update the phone number.
20. Select a phone number to display as the shared line caller ID.
21. Click **Done**.
22. Under **Alternate Caller ID**, click **Edit** to select the phone number to display.
23. Click **Done**.
24. Select **Display extension number** or **Display phone number** to set the caller ID of the groups for internal calls.
25. Click **Save**.
26. Click **Voicemail and Notifications**.

The voicemail greeting and settings for the shared line can be set up during and after work hours.
27. Under the **Work hours** and **After hours** tabs, to set your preferences:
 - a. Click **Edit Schedule** to change your work hours.
 - b. Click the **Voicemail greeting (work hours)** tab.
 - c. Click **Edit** to change your voicemail greeting.
 - d. Under the **Send voicemail to** tab, select the existing or other extension to send your voicemail messages.
28. Click the **Settings** tab, and select your preferences.
 - a. Click **Edit** to update the notification settings for voicemail messages, received faxes, missed calls, and received text messages.

- b. Turn the toggle on for **Voicemail to text** to get a text version of the voicemail.
- c. Click **Add Co-recipients** to enable the users to access the group messages.

Delegated lines

Delegated lines

The Delegated lines feature in the Avaya Cloud Office Desktop App enables administrators to assign delegates as assistants to make calls on behalf of the executives or transfer calls to the designated users. The requirements to perform this function are the following:

- The assistant and the executive have the Avaya Cloud Office Desktop App installed.
- The account has the **Presence**, **Conference**, and **HUD** services enabled for the assistant and the executive.

Related links

[Creating a Delegated Line](#) on page 130

Creating a Delegated Line

About this task

A delegated line is a phone extension shared by a group of users. The users can answer and make calls on behalf of the delegated line using the Heads-up display feature.

Procedure

1. Log in to **Admin Portal** as an administrator.
2. Click **Phone System > Groups > Shared Lines**.
3. Click the **New Shared Line** tab.
4. In the **Setup** tab, click the **Domestic** or **International** tab under the **Select a Location** tab.
5. Enter the information required under the **Group Details** tab.
6. Click **Next**.

The **Select Number** tab displays the office licenses available in the cost center.

Note:

- 25 You can add details in the **Number Inventory** or **New Number** tab.
7. In the **Select Number** tab, select the information from the available options in **State/Province** and **Area Code**.
8. Click **Add to Group**.
9. Click **Next**.
10. Click the **Select Owner** tab to select an owner.

11. Select the user extension to assign as the owner of this delegated line.
12. Activate the switch under the **Active** tab for the Avaya Cloud Office device.
13. Click **Next**.
14. In the **Select Delegates** tab, click the **Add Delegates** tab to add up to nineteen delegates for the line. The selected delegates can receive and make calls on behalf of the owner.
15. Activate the required devices for each delegate added.
16. Click **Next**.
17. Confirm the details and select the check box to acknowledge the information.
18. Click **Next**.
19. Click **Yes** to proceed with the reboot of all personal phones and phones associated with the group.

Result

The new delegated line is displayed in the group.

Related links

[Delegated lines](#) on page 130

Configuring a Delegated Line

Configuring a Delegated Line

Call delegation enables you to manage multiple incoming calls from your desktop. A Delegated line is a single extension shared among multiple users. This feature enables your primary number to appear on different phones. Configuring the delegated lines enables you to do the following:

- Call on behalf of.
- Hold and pick up within the group.
- Share lines.
- Join calls or barge in.

Configuring Delegated Line Details

About this task

Delegated line details enable the user to select the group name, appearances, site selection, and schedule for the delegated line.

Procedure

1. Log in to **Admin Portal**.
2. Click **Phone System > Groups > Delegated Lines**.
3. Select a delegated line and click the **Delegated Line Details** dropdown.
4. In the **General** tab, click **Edit** to change the record group name details.

5. Edit the number of appearances from the drop-down list.
6. Toggle on to add the index number to the Label on the phone.
7. Click the **Send Invite** button to the email address of the manager.
8. Select the check box to include the delegated line in the company directory.
9. Click the **Delete Group** button to delete the group details.
10. Click **Save**.
11. Click the **Settings** tab and set your preferences.
 - a. **Regional Settings**: Click **Edit** to change the regional settings.
 - b. **Schedule**: Click **Edit** to change the work hours schedule or to select a specific schedule based on the time zone.
 - c. **Site**: Click **Edit** to select the company or test site.
 - d. **Confirmation Message**: Click **Edit** to select the duration of displaying the confirmation message.

Configuring Owner and Delegates

About this task

The owner and delegates settings enable the administrator to select the delegates and rules for the delegated lines.

Procedure

1. Log in to **Admin Portal**.
2. Click **Phone System > Groups > Delegated Lines**.
3. Select a delegated line and click the **Owner and Delegates** dropdown.
4. Click the **Change Owner** button to select the user extension and assign the owner of this delegated line.
5. Click **Done**.
6. Click the **Change Delegates** button to select the user extension to add as delegates for this delegated line.
7. Click **Done**.
8. Toggle on to activate the available devices for each delegate under the **Active** tab.
9. Click **Remove** to remove the delegates under the **Actions** tab.
10. Click **Save**.

Configuring Direct Numbers

About this task

Direct number settings enable the user to set the phone number for the auto-receptionist, video and audio conferencing rules for the delegated line.

Procedure

1. Log in to **Admin Portal**.
 2. Click **Phone System > Groups > Delegated Lines**.
 3. Select a delegated line and click the **Direct Numbers** dropdown.
 4. Click the **Add Direct Number** tab.
 5. In the **Select Numbers** tab, click to select from the dropdown list and edit the **Location**, **Number Type**, and **Cost Center** details.
 6. Add the number information in the **State/Province** and **Area Code** tabs.
 7. Select a number from the number inventory and click the **Add Numbers** button.
 8. Click **Next**.
- A page is displayed to assign the number to The Campaign Registry registration.
9. Click **Assign later** or **Assign now** to enable SMS for the selected number.
- The number is displayed in the list.
10. Click **Edit** to change the details.
 11. Click **Save**.

Configuring Greeting & Hold Music

About this task

Greetings and hold music settings enable the administrator to set custom call handling rules for the delegated line.

Procedure

1. Log in to **Admin Portal**.
2. Click **Phone System > Groups > Delegated Lines**.
3. Select a delegated line and click the Greeting & Hold Music dropdown.
4. Go to the **Work hours** tab.
5. Under the Delegated Line Greeting section, click **Edit** to set the actions to enable the callers to hear a group-wide greeting before connecting to a delegated line.
6. Under the Hold Music section, click **Edit** to set the actions to enable the callers to hear selected music while they are put on hold.
7. Under the Audio While Connecting section, click **Edit** to set the actions to enable the callers to hear selected music while they are connecting to the extension.
8. Click **Save**.
9. Go to the **Blocked calls** tab.
10. Under the Block option section, select from the dropdown list to block either specific calls and faxes or all calls.

11. Click **Edit** to select from the available custom messages to play an automated reply.
12. Under the Robocalls section, select from the dropdown list to block the devices and calls with no caller ID.
13. Under the Block calls from pay phones section, select from the available custom messages to play an automated reply.
14. Click **Save**.

Configuring Call Handling

About this task

Call handling settings updated during and after work hours enable the user to set custom call handling rules for the delegated line.

Procedure

1. Log in to **Admin Portal**.
2. Click **Phone System > Groups > Delegated Lines**.
3. Select a delegated line and click the **Call handling** dropdown.
4. Go to the **Work hours** tab.
5. Click **Edit schedule** to select the work hours and time zone.
6. Click **Save**.
7. In the **Incoming calls** section, select the duration to ring for the owner and the delegate devices.
8. Select the settings to ring the owner device and delegate devices simultaneously or with a delay.
9. In the **Missed calls** section, select the settings to handle the calls when all lines are busy or the caller reaches the maximum waiting time.
10. Click **Set voicemail greeting for work hours** to create a greeting for the callers to play during the selected schedule.
11. Click **Edit schedule** to select the schedule and time zone.
12. In the **Voicemail greeting (work hours)** section, click **Edit** to set the greeting to play.
13. Click the **After hours** tab to check the existing schedule.
14. Click **Edit Schedule** to select the schedule and time zone.
15. Click **Settings** to edit the notification settings and toggle on the **Voicemail to text** section.
16. Select the check box to avoid ringing the delegate devices as the owner is set to Do Not Disturb.
17. Click **Save**.

1 Configuring Outbound Caller ID

2 About this task

3 The outbound caller ID for the shared line group or the individual lines is set within the group.

4 Procedure

- 5 1. Log in to **Admin Portal**.
- 6 2. Click **Phone System > Groups > Delegated Lines**.
- 7 3. Select a delegated line and click the **Outbound Called ID** dropdown.
- 8 4. Click the Outgoing Call Displayed as dropdown, and select the Group or Group owner.
- 9 5. Click **Edit** to select the phone number to display.
- 10 6. Click **Done**.
- 11 7. Under the Alternate caller ID section, click **Edit** to select the phone number to display.
- 12 8. Click **Done**.
- 13 9. Under the For internal calls section, select Display extension number or Display phone
- 14 number to set the group caller ID for internal calls.
- 15 10. Click **Save**.

16 Configuring Voicemail & Notifications

17 About this task

18 The voicemail greeting and notification settings for the delegated line can be set up during and

19 after work hours.

20 Procedure

- 21 1. Log in to **Admin Portal**.
- 22 2. Click **Phone System > Groups > Delegated Lines**.
- 23 3. Select a delegated line and click the **Voicemail & Notifications** drop-down.
- 24 4. Under the **Work hours** tab, click **Edit schedule** to change your work hours.
- 25 5. Click **Save**.
- 26 6. Under the Voicemail greeting (work hours) section, click **Edit** to change your voicemail
- 27 greeting.
- 28 7. Click **Done**.
- 29 8. Under the Send voicemail to section, select between the existing extension or another
- 30 extension to send your voicemail messages.
- 31 9. Click the **After hours** tab.
- 32 10. Click **Edit schedule** and change your work hours.
- 33 11. Click **Save**.

- 1 12. Click the **Settings** tab.
- 2 13. Click **Edit** to update the notification settings for voicemail messages, received faxes,
- 3 missed calls, and received text messages.
- 4 14. Add the email addresses to send the email notifications in the Send email notifications to
- 5 section.
- 6 15. In the Send SMS notifications to section, select the carrier and add a phone number to
- 7 send SMS notifications.
- 8 16. Click **Save**.
- 9 17. Toggle on the Voicemail to text to get a text version of the voicemail.

Draft

Chapter 14: Managing templates from Admin Portal

As an administrator, you can use templates to simultaneously apply the same settings to multiple users or extensions. Templates provide consistency across the solution in your company and are easy to update to meet your business needs. From Admin Portal, you can create the user settings or call handling rules template types. You can also copy existing templates to create new templates with the same settings. Avaya Cloud Office™ provides you with the following templates:

- User Settings: To apply the same settings to multiple users.
- Call Handling: To apply the same call handling settings for users who work the same business hours.
- Key Templates: To define phone key layouts applied to multiple user devices.
- Call Queue Settings: To apply the same settings to multiple call queues.
- Limited Extension: To apply the same settings to multiple limited extensions.

Applying templates can take a couple of minutes. After the process is complete, Avaya Cloud Office™ sends you a notification email.

Adding a permission role template

About this task

Create a permission role template to apply the same permission role to multiple users simultaneously. For example, you can use a permission role template to change the permission level of multiple users from Standard International to a higher role.

Procedure

1. Click **Users > Templates > User Settings**.
2. Click **Add User Settings Template**.
3. On the Add User Settings Template window, in the **New Template Name** field, type the name for the template.
4. Click **Save**.

Avaya Cloud Office Service Web creates the template and displays the settings menu for it.

5. Click **User Details**.
6. In the **Roles** section, click **Edit**.
7. In the Roles window, select the role.
8. Click **Done**.
9. Back in the **Roles** section, select the **Override user settings** check box.
10. Scroll down and click **Save**.

Adding a user groups template

About this task

Create a user groups template to assign multiple users to the same groups simultaneously. You can assign users to one or multiple user groups. When you create a template for multiple groups and apply it to users, these users become members of multiple user groups.

Procedure

1. Click **Users > Templates > User Settings**.
2. Click **Add User Settings Template**.
3. On the Add User Settings Template window, in the **New Template Name** field, type the name for the template.
4. Click **Save**.

Avaya Cloud Office Service Web creates the template and displays the settings menu for it.

5. Click **User Details**.
6. In the **User Groups** section, click **Edit**.
7. On the Edit User's Groups window, select one or multiple user groups.
8. Click **Done**.
9. Back in the **User Groups** section, select the **Override user settings** check box.
10. Scroll down and click **Save**.

Adding a business hours template

About this task

Create a template to apply the same call handling settings for users who work the same business hours. After you apply a business hours template to users, Avaya Cloud Office™ handles incoming

calls to these users based on the schedule and call handling option configured in the template. The call handling options you can select from are as follows:

- Ring my devices
- Send to voicemail
- Play an announcement
- Forward to extension
- Forward to external number

Procedure

1. Click **Users > Templates > User Call Handling**.

2. Click **Add User Call Handling Template**.

Avaya Cloud Office Service Web displays the **Add User Call Handling Template** window.

3. On the Conditions tab, select the **Date and/or Time** check box.

4. Select one of the following options and configure the period for the template:

- **Weekly Schedule**: To define a weekly schedule for the template.
- **Specific Date Range**: To define a specific date range for the template.

5. Click **Next**.

6. On the Call Handling tab, under **Select what should happen when incoming calls match the rule**, select a call handling option.

7. Make any necessary configurations for the selected option, then click **Next**.

8. On the Summary tab, in the **New Template Name** field, type the name for the template.

9. Click **Save**.

Adding a key template

About this task

Create a key template to define phone line and soft key layouts applied to multiple user devices. You can assign the following line keys:

- Primary line slot
- Delegated or shared line slot
- Extension slot
- Speed dial
- Feature

Avaya Cloud Office™ assigns the slot line keys as placeholder slots that extensions automatically populate when the template is applied. For soft keys, you can assign speed dials and features.

After you create and apply a key template, Avaya Cloud Office™ reboots the user devices to implement the template. If a user has an active call, the device reboots after the call is complete.

Procedure

1. Click **Users > Templates > Key Templates**.
2. Click **Add Key Template**.
3. On the Add Key Template window, in the **New Template Name** field, type the name for the template.
4. From the **Device Model** list, select the model of user devices to apply the template.
5. Click **Save**.

Avaya Cloud Office Service Web creates the template and displays the settings menu for it.

6. Click **Key Layout > Edit**.

Avaya Cloud Office Service Web displays the Key Template window.

7. To assign a line key, on the Line Keys tab, in the key row, click ⋮ and do one of the following:

- Click **Assign Primary Line - Slot**.
- Click **Assign Delegated / Shared Line - Slot**.
- Click **Assign Extension - Slot**.
- Click **Assign Speed Dial**, enter the name and number and click **Assign**.
- Click **Assign Feature**, select the required feature and click **Assign**.

8. To assign a soft key, on the Soft Keys tab, in the key row, click ⋮ and do one of the following:

- Click **Assign Speed Dial**, enter the name and number and click **Assign**.
- Click **Assign Feature**, select the required feature and click **Assign**.

9. Click **Done**.

Key Template - Avaya J189

Line Keys

Soft Keys

Assign keys to make a template layout. Some slot keys (example: User Extension) may be assigned as placeholder slots which will be automatically populated by the user's extensions when the Template is applied. Other keys like Feature Key will be added to the user's phone.

Key	Name / Slot	Ext. or Number	Key Type	Actions
⋮ 1	Primary Line - Slot	N/A	Primary Line	⋮
⋮ 2	Delegated / Shared Line - Slot	N/A	Delegated / Shared Line	⋮
⋮ 3	Delegated / Shared Line - Slot	N/A	Delegated / Shared Line	⋮
⋮ 4	Intercom	N/A	Feature-Intercom	⋮
⋮ 5	Logout	N/A	Feature-Logout	⋮

1 Configuring a template with emergency response location settings

3 About this task

4 Configure an emergency response location template that you can apply to multiple users. With
5 an emergency response location template, you can override user settings and set an emergency
6 response location for unconfigured devices.

7 Procedure

- 8 1. On the main page, click **Users > Templates > User Settings**.
- 9 2. Click **Add User Settings Template**.
- 10 3. In the **New Template Name** field, type a name for the template.
- 11 4. Click the newly created template.
- 12 5. Click **Devices**.
- 13 6. Under the Emergency Response Location section, click **Edit Location**.
- 14 7. On the Emergency Response Location window, you can do one of the following:
 - 15 • Select an organization-designated emergency location from the list.
 - 16 • Add a new emergency location.
- 17 8. Click **Done**.
- 18 9. Under the Emergency Response Location section, select the **Override user settings**
19 check box.
- 20 10. Scroll down and click **Save**.

21 Applying a template with emergency response location settings to users

23 About this task

24 Apply a template with emergency response location settings to change the response location for
25 multiple users.

26 Before you begin

27 Ensure that you create a template with location settings for emergency response.

28 Procedure

- 29 1. On the main page, click **Users > User List**.
- 30 2. In the list, select the check boxes of the users to apply templates.
- 31 3. On the taskbar, click **Apply Template**.
- 32 4. From the list, select the emergency location template.

- 1 5. Click **Apply Template**.
- 2 6. Click **Continue**.
- 3 7. In the dialog box, click **Continue**.
- 4 8. **(Optional)** To notify the affected users by email, select the **Notify active users of this**
- 5 **change by email** check box.
- 6 9. **(Optional)** To send a copy of the notification email to additional recipients, type the email
- 7 addresses in the field.
- 8 10. Click **Apply Template**.

9 Adding a limited extension template

10 About this task

11 Create a limited extension template to simultaneously apply the same settings on multiple limited
12 extensions. You can apply a limited extension template only to the enabled limited extensions.

13 Procedure

- 14 1. Click **Phone System > Templates > Limited Extension Settings**.
- 15 2. Click **Add Limited Extension Settings Template**.
- 16 3. On the Add Limited Extension Settings Template window, in the **New Template Name**
- 17 field, type the name for the template.
- 18 4. Click **Save**.
- 19 Avaya Cloud Office Service Web creates the template and displays the settings menu for
- 20 it.
- 21 5. Click **Phone**.
- 22 6. In the **Company emergency response location** section, click **Edit Location**.
- 23 7. On the Emergency Response Locations window, select the location and click **Done**.
- 24 8. Back in the **Company emergency response location** section, select the **Override**
- 25 **Extension Settings** check box.
- 26 9. From the settings menu, click **Outbound Caller ID**.
- 27 10. In the **Primary Caller ID** section, click **Edit**.
- 28 11. On the Select Number window, from the list, select the primary number.
- 29 You can use the Search bar to find the required number.
- 30 12. Click **Done**.
- 31 13. Back in the **Primary Caller ID** section, select the **Override user settings** check box.
- 32 14. In the **Alternate Caller ID** section, click **Edit**.

15. On the Select Number window, from the list, select the alternate number.
You can use the Search bar to find the required number.
16. Click **Done**.
17. Back in the **Alternate Caller ID** section, select the **Override user settings** check box.
18. Click **Save**.

Copying a template

About this task

Copy an existing template to create another template with the same settings.

Procedure

1. Click **Users > Templates**.
Alternatively, you can click **Phone System > Templates**.
2. Click the subtab for the template type you want to copy.
3. Next to the template to copy, click ⋮.
4. Click **Duplicate**.
5. On the Duplicate Template window, in the **New Template Name** field, type the name for the new template.
6. Click **Save**.

Applying a template to users

About this task

Apply an existing template to multiple users to assign the same settings to these users. You can apply a template to users that are not members of a call queue group. When you apply a template to users, you can notify the users by sending an automatic email to these users.

The process of applying a template takes several minutes. After the process is complete, Avaya Cloud Office™ sends you an email.

Procedure

1. Click **Users > Templates > User Settings**.
2. Next to the template to apply, click ⋮.
3. Click **Apply**.

4. On the Apply Template window, from the list, select the users to apply the template.

You can use the Search bar to find the users.

5. Click **Apply**.

6. On the Apply Template Confirmation window, click **Continue**.

7. **(Optional)** To send a notification email to the effected users, on the Apply Template Notification window, select the check box.

When you finish applying a template, additional recipients you add also receive an automatic email notification from Avaya Cloud Office™.

8. Click **Apply Template**.

Avaya Cloud Office Service Web displays a pop-up window with a confirmation message.

Deleting a template

About this task

Delete a template to permanently remove this template from Avaya Cloud Office™.

Procedure

1. Click **Users > Templates**.

Alternatively, you can click **Phone System > Templates**.

2. Click the subtab for the template type you want to delete.

3. Next to the template to delete, click ⋮.

4. Click **Delete**.

5. On the Confirmation window, click **Yes**.

Chapter 15: Meetings and recordings

Administrators can configure general video meeting settings and maintain archives of video meeting recordings. Avaya Cloud Office™ users can record meetings and store the recordings in Recording Management. The Meetings page displays the following details of the meeting recordings:

- **Host:** The name of the meeting host.
- **Topic:** The source of the recording.
- **ID:** The meeting ID.
- **Start Time:** The date and time when the recording was started.
- **Actions:** The options to download and delete a recording.

Administrators can download these recordings and send them as email attachments to users if the attachments comply with the email size restrictions. Although administrators and users can modify meeting settings for recording, only administrators and group managers can lock specific features.

Downloading recordings

About this task

You can download meeting recordings in .mp4 format and view the recordings or send them as email attachments.

Procedure

1. Click **Meetings**.

The Meetings page under Recording Management displays a list of meeting recordings and their details.

2. To download a meeting recording, click the corresponding ⋮.
3. Click **Download**.

Deleting recordings

About this task

Avaya Cloud Office™ stores meeting recordings for a year. However, once you delete a recording, Avaya Cloud Office™ irretrievably removes the recording.

Procedure

1. Click **Meetings**.

The Meetings page under Recording Management displays a list of meeting recordings and their details.

2. To delete a meeting recording, click the corresponding ⋮.

3. Click **Delete**.

Configuring meetings settings

About this task

Administrators can enable or disable meeting features for users depending on their requirements. These features are available under the following sections in Meeting Settings:

- Security
- Basic
- Recordings and post-meeting materials
- Email notifications

For example, to enable the Waiting Room feature for all users or specific users, you can select one of the following options under Security: Everyone; Anyone outside my company; or Anyone not signed in.

When you enable or disable features, users can still change these settings to their preference within their extension settings. You can lock these features to prevent users from changing these settings.

Procedure

1. Click **Meetings > Meetings Settings**.

2. Under Settings, enable or disable the following features:

- Use end-to-end encryption for scheduled meetings
- Require password for scheduled meetings
- Only authenticated users can join
- Enable waiting room for: Everyone, Anyone outside my company, or Anyone not signed in

- Participants can only join after the host
 - Only host & moderators can share screen
 - Allow remote control during screen sharing
3. Under Basic, enable or disable the following features:
 - Allow chat in meetings
 - Entry & exit tones
 4. Under Recordings and post-meeting materials, enable or disable the following features:
 - Allow meetings to be recorded
 - Automatically start recording when hosts or moderators join meetings
 - Prepare these meeting materials based on recordings: Transcripts, Summaries and keywords, Highlights, or Topics. You can enable or disable each of these meeting materials.
 5. Under Email Notifications, enable or disable the following features:
 - Send when recording is ready
 - Send when recording is deleted
 - Send when recording is shared
 - Send when meeting has ended
 6. **(Optional)** To lock any of the above features, click the corresponding **Lock** option.
Alternatively, to remove a lock from a feature, click the corresponding **Unlock** option.

Chapter 16: Configuring the Auto-Receptionist

As an administrator, you can set up the Avaya Cloud Office™ Auto-Receptionist for your phone system to handle incoming calls. The Auto-Receptionist includes the IVR menu that callers hear when dialing the main company number and the automated system that connects callers to the exact internal user extension they need. This functionality enables calls to be answered automatically with a default or a custom recording.

To automatically answer incoming calls with the Auto-Receptionist, you must configure the company general settings. You can configure the following settings:

- **Company Hours:** To set up custom company business hours.
- **IVR Settings:** To set up basic Auto-Receptionist settings, such as company greeting, custom answering rules, operator extension, and zero dialing.
- **Dial-by-Name Directory:** To set up extensions in the dial-by-name directory.
- **Call Recording:** To configure automatic call recording for incoming calls.
- **Block robocalls on toll-free numbers:** To set up robocalls blocking.
- **Regional Settings:** To configure your regional date and time settings.

You can create an IVR menu to assign extensions to the key presses and set up a prompt for callers. With extensions assigned to key presses, the Auto-Receptionist transfers incoming calls to an extension when a caller presses the key connected to this extension.

The screenshot shows the Avaya Cloud Office Admin Portal interface. The top navigation bar includes links for Home, Users, Phone System, Meetings, Reports, Billing, and More. The left sidebar contains a menu with options like Company Info, Phone Numbers, Auto-Receptionist, IVR Menus, IVR Editor, Prompts Library, Groups, Phones & Devices, and Emergency Calling. The main content area is titled 'Auto-Receptionist » General Settings'. It includes a description: 'Create your own Auto-Receptionist for your Phone System. Customize your options for effective call management. [Learn more](#)'. There is a 'Single Level' dropdown button. Below this are several expandable sections: 'Company Hours' (set to Custom), 'IVR Settings' (Operator Ext. field), 'Dial-by-Name Directory' (set to On), 'Call Recording' (On-demand: On, Automatic: Off), and 'Block robocalls on toll-free numbers' (set to Off).

1

2 Related links

3

[Auto-Receptionist: Custom Answering Rule - video](#)

4

[Reviewing General Settings Within the Auto Receptionist - video](#)

5

[Auto-Receptionist: Create an IVR Menu – video](#)

6 Creating an IVR menu

7 About this task

8

Create an IVR menu and assign extensions to the key presses to distribute incoming calls according to the defined keys. After you assign the key presses, you must also add a prompt with the options of key presses for callers.

9

10

11

With extensions assigned to key presses, the Auto-Receptionist transfers incoming calls to an extension when a caller presses the key connected to this extension.

12

13 Procedure

14

1. Click **Phone System > Auto-Receptionist > IVR Menus > New IVR Menu**.

15

2. In the Add IVR Menu window, under **Extension Name**, type a name for the IVR menu.

16

3. Click **Save**.

17

4. Click the new IVR menu name.

5. Click **Key Presses**.

6. Under **Key Presses**, click **Add Key**.

7. In the Key Press Assignment window, under **Key Press**, select the key and select the extension to assign to this key.

8. Click **Save**.

You can later edit or delete the assigned key presses.

9. Repeat steps 6 to 8 until you assign all required extensions.

10. Under **Generic Key Presses**, do one of the following:

- To use the default settings, select **Use default settings**.
- To customize settings, select **Specify** and select the new settings.

11. Click **Save**.

12. Click **Prompt**.

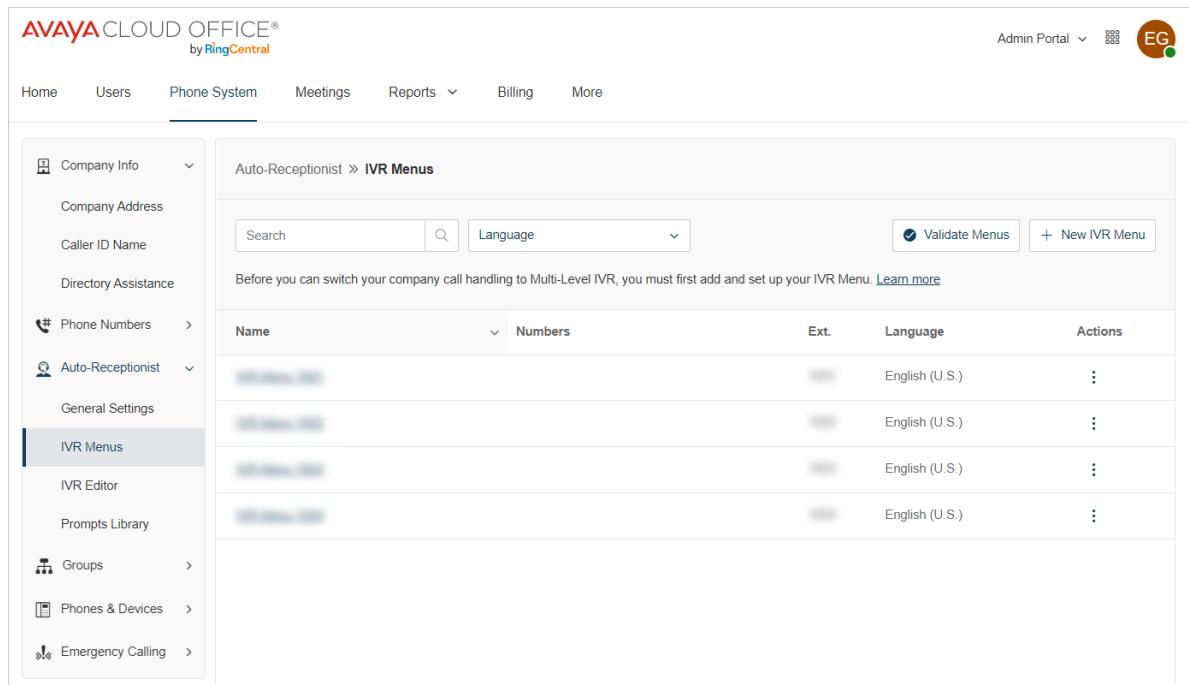
13. Under **Prompt Mode**, do one of the following:

- To use an audio prompt, select **Audio** and select the audio recording.
- To use a text-to-speech prompt, select **Text to speech** and type the text for the prompt.

Text for the prompt must contain only letters, spaces, commas, and dots. For example, Thank you for your call. Please, press 1 for Sales support, 2 for the Warehouse, 3 if you know the name of the party you're trying to reach, or 0 for the Operator. To repeat this Menu, press pound.

14. Click **Save > Back**.

15. To see misconfigurations, on the IVR Menus screen, click **Validate Menus**.



Assigning a new phone number to an IVR menu

About this task

When configuring an Interactive Voice Response (IVR) menu for incoming call routing, note that it is initially assigned only an internal extension by default. To enable callers to access the IVR, you need to assign it a phone number—this can be a new local, toll-free, or vanity number, or one already available in your inventory.

Procedure

1. Log in to Admin Portal.
2. Click **Phone System > Auto-Receptionist > IVR Menus**.
3. Click the name of the IVR menu where you want to add a direct number.
4. In the **Direct Number** section, click **Add**.
5. On the Add Direct Number window, click **Location**, then select the country of the registry for the direct number.
6. Click the Number Type dropdown, then select either Local Number, Toll-Free Number, or Vanity.

7. Local Number

- a. Enter the relevant information into the State/Province and Area Code dropdowns.
- b. Check the boxes next to the numbers you want to add, then click **Add Numbers**.

8. Toll-Free Number

- a. Select the area code prefix you want to use.
- b. Check the boxes next to the numbers you want to add, then click **Add Numbers**.

9. Vanity Number

- a. Click the 8** dropdown to select your number's prefix.
- b. Enter a combination of numbers and letters into the next two fields, then click **Search** to verify the number is available. You can use the asterisk (*) key as a wildcard when searching for numbers.
- c. Complete the CAPTCHA.
- d. Select the number to confirm, then click **Add Numbers**.

10. Click **Next**.

11. Confirm your choices:

- For Toll-Free and Vanity numbers, click OK in the popup.
- For local numbers, check the box next to the acknowledgment statement, then click Next.

12. Click **Done**.

Next steps

To confirm that your new direct numbers have been added to your IVR menu:

- On the IVR Menus page, check the Numbers column for the new numbers.
- On the Extension Info page, check for the number under Direct Number.

Selecting an existing phone number for an IVR menu

About this task

If you already have a phone number in your inventory, you can assign it by selecting it from the number inventory.

Procedure

1. Log in to Admin Portal.
2. Click **Phone System > Phone Numbers > Number Inventory**.
3. Click ⋮ corresponding to the existing number that you want to assign and click **Assign to**.
4. On the **Assign Number** dialog box, select **Extension** to assign the phone number to an IVR menu extension and click **Select Extension**.

5. On the **Select Extension** window, select or search for the IVR menu to assign this number to and click **Select**.
 6. To confirm your selection, click **Assign**.
- The system displays the message Phone number has been successfully assigned.

Setting up Company hours greeting

About this task

The company greeting plays a default or a custom message for all callers.

After setting up the company greeting, incoming calls are routed to a fixed menu that provides options to dial an extension, access the dial-by-name directory, or connect to the operator.

Procedure

1. Click **Phone System > Auto-Receptionist > General Settings**.
If your company has multiple sites, select the preferred site to configure its call handling settings.
2. Click **Call Handling**.
3. Click the **Business hours** tab to set up call handling for work hours.
4. From the list of available options, specify the routing destination for incoming calls.
Select **Company greeting**.
5. Click **Edit**.
6. In the Business hours greeting window, you can set the greeting message, select the greeting language, and define the action if a caller does not press a key: disconnect the call or connect to the operator.
7. Click **Done**.
8. Click **Save**.

Setting up After hours greeting

About this task

The company greeting plays a default or a custom message for all callers.

Procedure

1. Click **Phone System > Auto-Receptionist > General Settings**.

1 If your company has multiple sites, select the preferred site to configure its call handling
2 settings.

3 2. Click **Call Handling**.

4 3. Click the **Closed hours** tab to set up call handling for after work hours.

5 4. From the list of available options, specify the routing destination for incoming calls.

6 Select **Company greeting**.

7 5. Click **Edit**.

8 6. In the Closed hours greeting window, you can set the greeting message, select the
9 greeting language, and define the action if a caller does not press a key: disconnect the
10 call or connect to the operator.

11 7. Click **Done**.

12 8. Click **Save**.

13 Configuring custom answering rules

14 About this task

15 You can create custom answering rules to enable special call routing during holidays, specific
16 times of the day, or for designated callers.

17 Procedure

18 1. Click **Phone System > Auto-Receptionist > General Settings**.

19 If your company has multiple sites, select the preferred site to configure its call handling
20 settings.

21 2. Click **Call Handling**.

22 3. Click the **Custom Rules** tab.

23 4. Click **Add Custom Rule**.

24 5. In the Custom Answering Rule window, click **+ Add Rule** to create a new custom rule.

25 6. To edit an existing custom rule, click **Edit Custom Rule** next to the rule you want to modify.

26 7. To deactivate a custom rule, go to the Custom Answering Rule window and turn off the
27 toggle next to the respective rule.

Setting up company operator

About this task

The company operator decides who receives calls when a caller presses 0 during your company greeting or a coworker's voicemail message.

Procedure

1. Click **Phone System > Auto-Receptionist > General Settings**.

If your company has multiple sites, select the preferred site to configure its call handling settings.

2. Click **Call Handling**.

3. Click the **Settings** tab.

4. Go to **Call / Fax / SMS Recipients** to configure the following settings:

- a. **Operator:** Click **Select Extension** to choose the user who receives calls when a caller presses 0 during your company greeting or a coworker's voicemail message. Operators can do the following:
 - Receive inbound calls to the company number.
 - Place outbound calls on behalf of the company number.
 - Send outbound faxes on behalf of the company number.
- b. **Fax/SMS recipient:** Click **Fax/SMS recipient** to choose the user who receives faxes and SMS messages sent to your company and the main phone numbers of the site. This recipient can do the following:
 - Place outbound calls on behalf of the company number.
 - Receive inbound faxes to the company number.
 - Send outbound faxes on behalf of the company number.
 - Receive inbound SMS to the company number.
 - Send outbound SMS for the company number.

5. Click **Save**.

Setting up zero dialing

About this task

Set up the Zero Dialing option to define how the Auto-Receptionist handles callers who dial the 0 key while listening to a user or group extension greeting.

Procedure

1. Click **Phone System > Auto-Receptionist > General Settings**.

If your company has multiple sites, select the name of the site whose call handling settings you want to adjust.

2. Click **Call Handling**.

3. Click the **Settings** tab.

4. Go to **Zero Dialing** and select from the following:

- **Connect to company greeting:** To play the company greeting again.
- **Follow incoming call routing selection:** To apply the same call handling settings as those used during business hours.
- **Connect to extension:** To connect the caller to the defined operator extension or specific extension.
- **Do nothing:** To continue the call with no change.

5. Click **Save**.

Creating a multilevel IVR menu

About this task

A multilevel IVR system is a layered, interactive voice response technology that manages inbound calls and routes based on a series of predefined rules and settings.

Procedure

1. Log in to the Avaya Cloud Office™ account.
2. Go to **Admin Portal > Phone System > Auto-Receptionist > IVR Menus**.
3. Click **New IVR Menu**.
4. Select the **Site** option from the drop-down list.
5. Enter **Extension number** and **Extension name**.
6. Click **Save**.

The new IVR Menu page is created, and you will be redirected to the IVR Menus page.

1 Configuring a multilevel IVR menu

2 About this task

3 The multilevel IVR menu efficiently route calls by presenting callers with a structured series of
4 options and sub-menus, and directing complex issues to the correct extensions more accurately
5 than a single-level menu.

6 Procedure

- 7 1. Log in to the Avaya Cloud Office™ account.
- 8 2. Go to **Admin Portal > Phone System > Auto-Receptionist > IVR Menus**.
- 9 3. Click **IVR Menu Test** created.
- 10 4. In the Extension Info tab, enter **Extension Number**.
- 11 5. Select **Language** and **Site** from the drop-down options.
- 12 6. In the Direct Number tab, click **Add** and add contact numbers based on location and
13 number type.
- 14 7. Click **Assign later** or **Assign now** to assign the number to the campaign registry and
15 enable SMS service for the number.
- 16 8. Click **Delete IVR Menu** to delete the IVR menu created.

17 Configuring the IVR prompts

18 About this task

19 This procedure outlines the steps to configure the IVR prompts.

20 Procedure

- 21 1. Click IVR from the **IVR Menus** list to set up your IVR prompts.
- 22 2. Click **Prompt**.
- 23 3. To create your custom company greetings, select one of the following:
 - 24 a. **Audio**: Click to add a prompt to the prompts library. The prompt is a pre-recorded
25 custom company greeting in .mp4 or .wav format that you can import to the system.
26 It can also be a real-time recording through your phone or computer audio.
 - 27 b. **Text-to speech**: Click to type in your custom company greeting that the customers
28 will hear when they call your company number through text-to-speech. Use the words
29 hash, pound or star instead of # or *, if needed.
- 30 4. Click **Save**.

1 Configuring the Key Presses

2 About this task

3 This procedure outlines the steps to configure the IVR key presses and add the rules that direct
4 calls to their specified destinations.

5 Procedure

- 6 1. Click the IVR from the **IVR Menus** list to set up your IVR prompts.
- 7 2. Click **Key Presses**.
- 8 3. Click **Add Key**.
- 9 4. For Key, under the Actions tab, click **Edit** to configure the Key Press, Action, Extensions,
10 and Sites tabs.
- 11 5. In the Key Press tab, select 1 from the drop-down list.
- 12 6. In the Action tab, select **Connect to** from the drop-down list.
- 13 7. In the Sites tab, select a relevant option from the drop-down list.
- 14 8. Click **Save**.
- 15 9. Click **Add Key** to add and configure the details for Key 2.
- 16 10. In the Key Press tab, select 2 from the drop-down list.
- 17 11. In the Action tab, select **Transfer to voicemail of** from the drop-down list.
- 18 12. In the Sites tab, select a relevant option from the drop-down list.
- 19 13. Click **Save**.
- 20 14. Click **Add Key** to add and configure the details for Key 3.
- 21 15. In the Key Press tab, select 3 from the drop-down list.
- 22 16. In the Action tab, select **Connect to Dial-by-name directory** from the drop-down list.
- 23 17. Click **Save**.
- 24 18. Click **Add Key** to add and configure the details for Key 4.
- 25 19. In the Key Press tab, select 4 from the drop-down list.
- 26 20. In the Action tab, select **External Transfer** from the drop-down list.
- 27 21. In the Transfer to tab, enter the required details.
- 28 22. Click **Save**.
- 29 After following these steps, all four key passes are available on the **Key Presses** page.
- 30 23. Under the Generic Key Presses tab, select **Use default settings** to view the details and
31 edit.
- 32 24. Under the Generic Key Presses tab, select **Specify** to view the details and edit.
- 33 25. Click **Save**.

1 Configuring the Dial-by-Name Directory

2 About this task

3 The dial-by-name directory enables callers search and connect to the person they want to speak
4 with. By default, callers can access all extensions, but you can set up your dial-by-name directory
5 to exclude specific extensions from searches.

6 Procedure

- 7 1. Click **Phone System > Auto-Receptionist > Dial-by Name-Directory**.
- 8 2. Click the **Enable the dial-by-name directory** toggle to turn on the dial-by-name directory
9 feature.
- 10 3. To set up dial-by name-directory, adjust the following settings as required:
 - 11 a. **Directory Key:** In the **Key Press** field, enter the dialpad number you want to use to
12 route callers to your dial-by-name directory. When a caller enters this number while
13 listening to a user or group extension greeting, they will also connect to the directory.
 - 14 b. **Extensions in Directory:** By default, the dial-by-name directory includes all
15 extensions. Click **Edit**, then in the **Choose Extensions** window, select the extensions
16 you want to exclude in the directory, and click **Done**.
 - 17 c. **Search Criteria:** Select whether you want callers to search your dial-by name-
18 directory by the first three letters of an employees **First name** or **Last name**.
 - 19 d. **(Optional)** If the multisite feature enabled, you can also specify the **Users included**
20 **in search**.
 - 21 a. **All users in directory:** Select this option to include users from all company sites
22 in search results.
 - 23 b. **Users in selected sites:** Select this option to include users from specified
24 company sites in search results.
 - 25 c. **Users in the same site as the IVR menu:** Select this option to include in search
26 results the users from the company site that is assigned to the IVR menu.
- 27 4. Click **Save**.

28 Organizing the Auto - Receptionist

29 About this task

30 The purpose of organizing the auto - receptionist is to automate the management of incoming calls
31 by improving their efficiency with a structured experience.

32 Procedure

- 33 1. Log in to the Avaya Cloud Office™ account.

2. Go to **Admin Portal > Phone System > Auto-Receptionist > General Settings**.
3. Click **Main Site**.
4. To customize options for call management, select from the following:
 - a. **Schedule**
 - b. **Call Handling**
 - c. **Call Recording**
 - d. **AI Assistant**
 - e. **Block Robocalls on toll-free numbers**
 - f. **Regional Settings**

Configuring Schedule

About this task

Configuring an auto-receptionist schedule directs businesses to automate call routing based on hours of operation. It ensures that the callers reach correct destination, even outside of the standard hours of work.

Procedure

1. Log in to the Avaya Cloud Office™ account.
2. Go to **Admin Portal > Phone System > Auto-Receptionist > General Settings**.
3. Click **Main Site**.
4. Click **Schedule**.
5. To create a schedule for your business opening hours, select one of the following:
 - a. **24 hours, 7 days a week**: Select a 24/7 schedule to apply to your calls.
 - b. **Specific schedule**: Select the days and operational hours in a week.
6. Click **Save**.

Configuring Call Handling

About this task

Call handling settings updated during and after work hours enable the user to set custom call handling rules for the delegated line.

Procedure

1. Log in to **Admin Portal**.
2. Click **Phone System > Groups > Delegated Lines**.
3. Select a delegated line and click the **Call handling** dropdown.
4. Go to the **Work hours** tab.

5. Click **Edit schedule** to select the work hours and time zone.
6. Click **Save**.
7. In the **Incoming calls** section, select the duration to ring for the owner and the delegate devices.
8. Select the settings to ring the owner device and delegate devices simultaneously or with a delay.
9. In the **Missed calls** section, select the settings to handle the calls when all lines are busy or the caller reaches the maximum waiting time.
10. Click **Set voicemail greeting for work hours** to create a greeting for the callers to play during the selected schedule.
11. Click **Edit schedule** to select the schedule and time zone.
12. In the **Voicemail greeting (work hours)** section, click **Edit** to set the greeting to play.
13. Click the **After hours** tab to check the existing schedule.
14. Click **Edit Schedule** to select the schedule and time zone.
15. Click **Settings** to edit the notification settings and toggle on the **Voicemail to text** section.
16. Select the check box to avoid ringing the delegate devices as the owner is set to Do Not Disturb.
17. Click **Save**.

Configuring Business hours

About this task

This procedure outlines the steps to configure the call handling settings during business hours. It includes creating a custom call routing for the incoming calls and company greetings.

Procedure

1. Log in to the Avaya Cloud Office™ account.
2. Go to **Admin Portal > Phone System > Auto-Receptionist > General Settings**.
3. Click **Main Site**.
4. Click **Call Handling**.
5. To create a schedule for your **Business hours**, click **Edit Schedule**.
6. Select one of the following options:
 - a. **24 hours, 7 days a week**: Select a 24/7 schedule to apply to your calls.
 - b. **Specific schedule**: Select the days and operational hours in a week.
7. Click **Save**.
8. From the **Incoming calls will be routed to** section, select one of the following options to route the incoming calls to the set destination:

- **Company greeting**
- **IVR menu**
- **A specific user**
- **Multiple users - call queue**
- **Voicemail**
- **Announcement**
- **Shared line**
- **Limited extension**
- **Site**

9. In the **Company greeting** section, click **Edit**.

10. In the **Set Greeting** section, select **Default** or **Custom** from the dropdown list.

11. In the **View In** section, select the language to view the information.

12. In **If Caller Enters no Action**, select from the following options:

- **Connect to operator**
- **Disconnect**

13. Click **Done**.

Configuring Closed hours

About this task

This procedure outlines the steps to configure the call handling settings during closed hours. It includes creating the custom call routing for the incoming calls and company greetings.

Procedure

1. Log in to the Avaya Cloud Office™ account.
2. Go to **Admin Portal > Phone System > Auto-Receptionist > General Settings**.
3. Click **Main Site**.
4. Click **Call Handling**.
5. To create a schedule for your **Closed hours**, click **Edit Schedule**.
6. Select one of the following options:
 - a. **24 hours, 7 days a week**: Select a 24/7 schedule to apply to your calls.
 - b. **Specific schedule**: Select the days and operational hours in a week.
7. Click **Save**.
8. From the **Incoming calls will be routed to** section, select one of the following options to route the incoming calls to the set destination:
 - **Company greeting**

- **IVR menu**
- **A specific user**
- **Multiple users - call queue**
- **Voicemail**
- **Announcement**
- **Delegated line**
- **Shared line**
- **Limited extension**
- **Site**

9. In the **Company greeting** section, click **Edit**.

10. In the **Set Greeting** section, select **Default** or **Custom** from the dropdown list.

11. In the **View In** section, select the language to view the information.

12. In the **If Caller Enters no Action** section, select from the following options:

- **Connect to operator**
- **Disconnect**

13. Click **Done**.

Configuring Custom rules

About this task

This procedure outlines the steps to configure the multi-condition advanced call handling rules for the custom answering process. It includes creating the custom call answering rules for the caller ID, called number, and the scheduled hours in the week or on holidays.

Procedure

1. Log in to the Avaya Cloud Office™ account.
2. Go to **Admin Portal > Phone System > Auto-Receptionist > General Settings**.
3. Click **Main Site**.
4. Click **Call Handling**.
5. To configure **Custom Rules**, click **Edit Custom Rule**.
6. Click **Add Rule** to add the multi-condition advanced call handling rules.
7. In the **Conditions** tab, select the **Caller ID** check box to add a phone number or a contact name.
8. Select the **Called Number** check box to add a number from the extension database.
9. Select the **Date and/or time** check box to select the schedule, day, and hours of operation.
10. Select from the following options:

- **Weekly Schedule**

- **Specific Date Range**

- **Use Work or After Hours Schedule**

11. Select the days of the week and the schedule for the operation.

12. Click **Apply to** and select from the following options:

- **All weekdays**

- **Every day**

13. Click **Next**.

14. In the **Call Handling** section, select one of the following options to match the incoming calls to the set rule:

- **Company greeting**

- **IVR menu**

- **A specific user**

- **Multiple users - call queue**

- **Voicemail**

- **Announcement**

- **Delegated line**

- **Shared line**

- **Limited extension**

- **Site**

15. In the **Company greeting** section, click **Edit**.

16. In **Set Greeting**, select **Default** or **Custom** from the dropdown list.

17. In the **View In** section, select the language to view the information.

18. In **If Caller Enters no Action**, select from the following options:

- **Connect to operator**

- **Disconnect**

19. Click **Done**.

20. Click **Next**.

21. In the **Summary** section, click **Edit** to change previous settings.

22. Click **Save**.

1 Configuring Settings

2 About this task

3 This procedure outlines the steps to configure the settings for the custom answering process.
 4 It includes creating the custom call answering rules for the caller ID, called number, and the
 5 scheduled hours in the week or on holidays.

6 Procedure

- 7 1. Log in to the Avaya Cloud Office™ account.
- 8 2. Go to **Admin Portal > Phone System > Auto-Receptionist > General Settings**.
- 9 3. Click **Main Site > Call Handling**.
- 10 4. Click **Settings**.
- 11 5. In the **Default IVR Settings** section, select from the following general navigation keys to
 12 set the menu with customized options for the keys and call routing to the extension or
 13 disconnecting the call:
 - 14 • **Repeat menu greeting**
 - 15 • **Return to root menu**
 - 16 • **Return to previous menu**
- 17 6. If the caller enters no action after the prompt is played three times, then select from the
 18 following options:
 - 19 • **Disconnect the call**
 - 20 • **Connect to extension**
- 21 7. In the **Zero Dialing** section, define the action when a caller presses 0 while listening to a
 22 user or group extension greeting:
 - 23 • **Connect to company greeting**
 - 24 • **Follow incoming call routing selection**
 - 25 • **Connect to extension**
 - 26 • **Do nothing**
- 27 8. In the **Call / Fax / SMS Recipients** section, for an operator, click **Select Extension** to
 28 receive calls when a caller presses 0 during the playing of the company greeting or an
 29 extension voicemail message.
- 30 9. Click **Done**.
- 31 10. For Fax / SMS recipient, click **Select Extension** to select the user.
- 32 11. Click **Done**.
- 33 12. Click **Save**.

1 Setting up on-demand call recording

2 About this task

3 You can set up on-demand call recording so users in your phone system can record calls from
4 their devices. On-demand call recordings are saved for 90 days.

5 When on-demand call recording is turned on, users can record phone calls at any time with the
6 press of a button. A notification will play to callers when the recording starts and when it stops.

7 Call recording regulations vary by geographic region. If your account includes multiple sites, you
8 can update call recording settings for each site individually.

9 Procedure

10 1. Click **Phone System > Auto-Receptionist > General Settings**.

11 If your company has multiple sites, select the preferred site to configure its call handling
12 settings.

13 2. Click **Call Recording**.

14 3. Select **Use custom call recording settings**.

* Note:

15 If you want to use the same recording settings set up for the Main Site, select **Use the**
16 **Main site call recording settings**.

17 4. Click the **Enable On-demand Call Recording** toggle to turn on.

18 5. Do the following to create a custom voice message that plays when the recording starts or
19 ends:

* Note:

20 Steps below are for setting up an **Announcement on Start**, similar steps are
21 applicable to **Announcement on Stop**.

* Note:

22 You can record a call using one method at a time. If a call is automatically recorded,
23 you cannot start an on-demand recording for the same call.

24 a. Click **Edit** under Announcement on Start.

25 b. In the Announcement on Start window, select **Custom** from the **Set Greeting** drop-
26 down, then choose how you want to record the announcement.

27 • **Phone**: Receive a phone call to record your greeting.

28 • **Computer Microphone**: Record your greeting using your computer microphone.

29 • **Importing**: Upload an MP3 file or WAV file.

30 c. Click **Done**.

31 6. Click **Save**.

1 Setting up automatic call recording

2 About this task

3 You can set up Automatic Call Recording (ACR), when you want to automatically record all calls to
4 a specific user or group extension. Recordings are saved in your Call Log.

5 When ACR is turned on, recording will start at the beginning of each call and stops after the call
6 ends. ACR feature is turned off by default.

7 Procedure

8 1. Click **Phone System > Auto-Receptionist > General Settings**.

9 If your company has multiple sites, select the preferred site to configure its call handling
10 settings.

11 2. Click **Call Recording**.

12 3. Select **Use custom call recording settings**.

* Note:

13 If you want to use the same recording settings set up for the Main Site, select **Use the**
14 **Main site call recording settings**.

15 4. Click the **Enable Automatic Call Recording** toggle to turn on.

16 5. Select or deselect the box next to the following optional settings:

- 17 • **Play periodic tones for outbound calls:** Plays a beeping sound in fixed intervals as a
18 reminder the call is being recorded.
- 19 • **Play call recording announcement for outbound calls:** Plays a message informing
20 the person answering that the call will be recorded.
- 21 • **Allow mute in auto call recording:** Enables the recording to be paused and then
22 restarted to prevent sensitive information from being recorded.

23 6. Do the following to create a custom voice message that plays when the call starts:

* Note:

24 You can record a call using one method at a time. If a call is automatically recorded,
25 you cannot start an on-demand recording for the same call.

26 a. Click **Edit** under Call Recording Announcement.

27 b. In the Call Recording Announcement window, select **Custom** from the **Set Greeting**
28 drop-down, then choose how you want to record the announcement.

- 29 • **Phone:** Receive a phone call to record your greeting.
- 30 • **Computer Microphone:** Record your greeting using your computer microphone.
- 31 • **Importing:** Upload an MP3 file or WAV file.

32 c. Click **Done**.

7. Click **Edit** under Extensions to Record to add the users and groups whose calls you want to record.
8. In the Users & Groups to Record window, select a tab to add specific extensions. You can also search by name, department, and sites.
9. Select the boxes under **Inbound** and **Outbound** to select the types of calls to record for the extensions. You can select the entire list by checking the boxes in the top row.
10. If you have outbound calls selected for extensions, you can check the boxes under **Smart ACR**.
Smart Automatic Call Recording (ACR) determines when to play a recording announcement based on the area code and number dialed. This reduces the number of times callers will disconnect after hearing a call recording notification unexpectedly.
11. Click **Save**.
12. Click **Save** in the **Automatic Call Recording** section.

Blocking robocalls on toll-free numbers

About this task

Robocalls are automated phone calls that deliver pre-recorded messages using auto-dialing systems. These calls can disrupt workflows, overload voicemail systems, and have a huge impact on the productivity of a business.

As an administrator, you can enable the blocking of robocalls for the sites of your company.

Procedure

1. Log in to Admin Portal.
2. Click **Phone System > Auto-Receptionist > General Settings**.
If your company has multiple sites, select the preferred site to enable the blocking of robocalls.
3. Click **Block robocalls on toll-free numbers**.
4. Move the slider button to enable blocking of robocalls on toll-free numbers.
5. Click **Save**.

Setting up regional settings

About this task

As an administrator, you can configure the time zone and time format for your company sites. The time format option can be set to 12 hour or 24 hour format. You can also configure the home country code, user language, greetings language, and regional format in this feature.

Procedure

1. Log in to Admin Portal.

2. Click **Phone System > Auto-Receptionist > General Settings**.
If your company has multiple sites, select the preferred site to configure its regional settings.
3. Click **Regional Settings**.
4. From the **Time zone** drop-down, select the correct time zone for your site.
5. Select one of the following time format:
 - 12 h (AM/PM)
 - 24 h
6. From the **Home Country Code** drop-down, select the country code for your site.
7. From the **User Language** drop-down, select the user language.
8. From the **Greetings Language** drop-down, select the greetings language.
9. From the **Regional Format** drop-down, select the regional format.
10. Click **Save**.

Voice Prompts Library

Prompt recordings provide callers with keypress instructions during calls. These prompts can be pre-uploaded and stored in the Prompts Library, and later used through the IVR tool.

When creating a new IVR menu in your phone system, it is important to add a prompt that guides callers on which keys to press. You can manage this within the Prompts library by doing the following:

- Import prompts
- Record prompts
- Assigning a prompt to an IVR menu
- View prompts
- Download an IVR menu prompt
- Delete an IVR menu prompt

Viewing Prompts in the Prompts Library

About this task

When creating a new IVR menu in your phone system, it is essential to include prompts that guide callers on which keys to press. These prompts can be uploaded, recorded, or assigned, and are managed within the Prompts Library.

After you upload or record prompts for your IVR menu, you can access and manage them within the Prompts Library.

If you have not uploaded or recorded any prompts yet, the Prompts Library will display the following message: No prompts found. You can import prompts from a local computer or record prompts using a phone or computer.

Procedure

1. Click **Phone System > Auto-Receptionist > Prompts Library**.
2. Click the preferred prompt row to view its details.

You can view the details of the selected prompt, including the prompt name and associated IVR menu.

Importing Prompts to the Prompts Library

About this task

You can import the prompt assigned to your IVR menu. Importing prompts enables quick configuration without requiring to create or upload new audio files.

Procedure

1. Click **Phone System > Auto-Receptionist > Prompts Library > Import Prompts**.
2. From your computer, select the audio files you want to import, and click **Open** to upload them to the IVR menu.

* Note:

- 17 Ensure the audio files are in a supported format before importing. For example, "mp3" and ".wav".

Recording Voice Prompts from the Prompts Library

About this task

You can record the prompt assigned to your IVR menu.

Procedure

1. Click **Phone System > Auto-Receptionist > Prompts Library > Record Prompts**.
2. In the Record Prompt window, enter **Prompt Name**.
3. Choose one of the following options to record your prompt:
 - Computer Microphone
 - Phone
4. In the Computer Microphone tab, do the following:
 - a. Click the Record icon, then speak your prompt into the computer microphone.

+ Tip:

- 30 Make sure your microphone is connected and functioning before recording.

- b. After recording, click the Stop icon to complete the recording process.
- c. You can click Play to listen to the recording.
- d. Click Record to record again.
- e. To use a different file, click the Upload icon to upload your recording from your computer.

Your new prompt recording will appear in the **Prompts Library**, ready for use or further editing.

5. In the Phone tab, do the following:

- a. Click the phone number drop-down, then select an existing number or Enter a new number.

If you select Enter a new number, enter a valid phone number in the **Call me at** field.

- b. Click **Call now**.
- c. Upon calling the provided number, you can record your prompt directly using your phone.

Your new prompt recording will appear in the **Prompts Library**, ready for use or further editing.

Assigning a prompt to an IVR menu

About this task

After creating a prompt, you can assign it to an IVR menu for use in your call flow.

Procedure

1. Click **Phone System > Auto-Receptionist > IVR Menus**.
2. Click the name of the IVR menu where you want to assign a prompt.
3. In the left column, click **Prompt**.
4. Select an option in the **Prompt Mode** section, which includes the following:
 - Audio
 - Text to speech
5. Select the **Audio** option to use an existing audio prompt.
 - a. Click **Select**.
 - b. In the Select Prompt window, choose the prompt you want to assign to the IVR menu.

In the Select Prompt window, you can search for prompts to quickly locate the one you want to assign.
 - c. Click **Select**.

6. Select the **Text to speech** option to use typed text and generate an automated voice prompt.

Type your prompt message in the **Text** box field to generate a speech-based audio prompt.

7. Click **Save**.

Downloading an IVR menu prompt

About this task

You can download existing IVR menu prompts from **Prompts Library** for reuse or customization.

Procedure

1. Click **Phone System > Auto-Receptionist > Prompts Library**.
2. In the **Actions** column, click the three-dot icon in the row of the prompt you want to download.
3. Click **Download**.

You will download the prompt to your computer.

Deleting an IVR menu prompt

About this task

You can delete existing IVR menu prompts from Prompts Library.

Procedure

1. Click **Phone System > Auto-Receptionist > Prompts Library**.
2. In the **Actions** column, click the three-dot icon in the row of the prompt you want to download.
3. Click **Delete**.
4. In the Confirmation window, click **Delete** to confirm.

You will remove the prompt from your library.

IVR Visual Editor

As an administrator, you have the option in Avaya Cloud Office™ to create and modify multilevel IVR menus through the Visual IVR Editor. The visual IVR editor is an easy-to-use graphical interface that enables administrators to add IVR menus and assign them to extensions. It also provides administrators the option to edit and update an existing IVR menu.

After saving, Avaya Cloud Office™ validates the IVR menu and notifies if there are any errors. You can also record menu prompts directly within the editor or import pre-recorded prompts.

*** Note:**

- 1 Only account administrators or users with administrative privileges can access the visual IVR
- 2 editor.

Insert ing title

About this task

Before you begin Procedure

- 1.
- 2.
- 3.

Example

Next steps

Viewing the visual editor help

About this task

You can access visual editor help from the Visual IVR Editor window.

Procedure

1. Log in to Admin Portal.
2. Click **Phone System > Auto-Receptionist > IVR Editor**.
3. In the **Visual IVR Editor** section, click **Launch Visual IVR Editor**.
4. Click the **i** icon at the top-right to learn more and access the introduction.
5. Click **Take a Tour** for a step-by-step interactive tutorial.
6. Click **Learn More** to read more information about the Visual IVR Editor.

Creating an IVR Menu in the Visual Editor

About this task

You can create and modify IVR menus using the Visual IVR Editor.

Procedure

1. Log in to Admin Portal.
 2. Click **Phone System > Auto-Receptionist > IVR Editor**.
 3. In the **Visual IVR Editor** section, click **Launch Visual IVR Editor**.
If you are accessing this menu for the first time, a short interactive demo guides you through using the IVR Visual Editor.
 4. Click the phone icon to generate a new IVR menu with a preset extension that you can customize.
 5. Hover over the menu, then click the plus (+) icon.
A pop-up window displays a list of sub-items that you can add to the IVR menu.
 6. Select one of the following sub-items from the pop-up window:
 - a. **New Menu**: Click to create a new IVR menu in your IVR tree. The auto-generated extension and name can be edited later.
 - b. **Existing Menu**: Click to add an existing IVR menu to your IVR tree. When you select this option, the list of existing IVR menus will open on the left of the page. Click a menu to preview it, then click **Use** to add it to your IVR tree.
 - c. **External Transfer**: Click to route the caller to a specified phone number. Click the phone number field to enter the preferred area code and number.
 - d. **Directory**: Click to attach your Avaya Cloud Office™ Dial-by-Name directory to your IVR tree.
 - e. **Voicemail**: Click to route the caller directly to an extension's voicemail box.
 - f. **Extension**: Click to add a specific extension to your IVR tree. This can be a group or a user.
- After adding sub-items to your IVR menu, the editor automatically assigns the key presses. You can change a key press by directly clicking on the number.
7. To save the configuration, click **Save** located in the top-left of the Visual IVR Editor.

Insert ing title

About this task

Before you begin Procedure

- 1.
- 2.
- 3.

Example

Next steps

Insert ing title

About this task

Before you begin

Procedure

1.

2.

3.

Example

Next steps

Editing the IVR menu settings

About this task

This procedure outlines the steps to customize the menus for better organization and functionality.

Procedure

1. Log in to the Avaya Cloud Office™ account.

2. Go to **Admin Portal > Phone System > Auto-Receptionist > IVR Editor**.

3. In the Visual IVR Editor, click **Launch Visual IVR Editor**.

4. Click the **Open Existing Menu** icon at the top left corner of the Visual IVR Editor interface to open the list of existing menus.

5. Click the IVR Menu to edit. The preview of the IVR menu is displayed in the right pane.

6. Click **Open**.

7. Click ○○○ in the primary IVR menu and select **Settings**.

8. Click the **Menu Settings** tab to configure the following:

- **Extension Info**

- **Prompt**

- **Key Presses**

9. In the **Extension Info** tab, enter the following details:

- **Extension Number:** Enter the number to route calls to the IVR menu.
 - **Menu Name:** Enter the name and number to identify an IVR menu.
 - **Language:** Select the preferred language from the dropdown list to use for the IVR menu text-to-speech greeting.
 - **Site:** Select a site from the dropdown list to assign the IVR menu.
10. In the **Prompt** tab, select from the following options:
- **Audio:** Click to assign one of the pre-recorded prompts imported from your computer to your Avaya Cloud Office account.
 - **Text to speech:** Click to define your greeting by typing it in the box provided.
11. In the **Key Presses** tab, under Generic Key Presses, select from the following options:
- **Use default settings:** Click to select the pre-assigned settings.
 - **Specify:** Click to modify the settings.
12. Under the **If caller enters no action after the prompt played 3 times** tab, select from the following options:
- **Disconnect the call**
 - **Connect to extension**
13. Click **Done**.
14. Click **Save**.
- Avaya Cloud Office™ automatically validates the configuration of your IVR menu and notifies you of any invalid configuration.

Duplicating an IVR menu

About this task

This procedure outlines the steps to duplicate an IVR menu and place it under other menus to manage larger IVR menu trees across various departments with similar menu options.

Procedure

1. Log in to the Avaya Cloud Office™ account.
2. Go to **Admin Portal > Phone System > Auto-Receptionist > IVR Editor**.
3. In the Visual IVR Editor, click **Launch Visual IVR Editor**.
4. Click the **Open Existing Menu** icon at the top left corner of the Visual IVR Editor interface. This will present the list of existing menus.
5. Click the IVR Menu to edit. The preview of the IVR menu is displayed in the right pane.
6. Click **Open**.

7. Click  in the sub-menu and select **Duplicate**.
8. Drag and drop the duplicate menu to the target place. A confirmation box opens.
9. Select from the following options to apply the settings to all other linked instances in your account:

- **Create Linked Copy**
- **Create Unlinked Copy**

10. Click **Create**.

11. Click  on the sub-menu to unlink a copy of a sub-menu.

12. Click **Save**.

Avaya Cloud Office™ automatically validates the configuration of your IVR menu and notifies you of any invalid configuration.

Deleting an IVR Menu

About this task

This procedure outlines the steps for deleting the existing IVR menu.

Procedure

1. Log in to the Avaya Cloud Office™ account.
2. Go to **Admin Portal > Phone System > Auto-Receptionist > IVR Editor**.
3. Below the Visual IVR Editor, click **Launch Visual IVR Editor**.
4. Click the **Open Existing Menu** icon at the top left corner of the Visual IVR Editor interface. This will present the list of existing menus.
5. Click the IVR Menu to edit. The preview of the IVR menu is displayed in the right pane.
6. Click **Open**.
7. Click the **Clear Workspace** icon to delete.
8. Click **Yes** in the confirmation window to delete the IVR workspace.

1 Exporting IVR XML file

2 About this task

3 An IVR XML file defines the call flow and interactions for an Interactive Voice Response system.
4 This file acts a script that an IVR platform interprets to play audio prompts, recognize user input,
5 and route calls. This procedure outlines the steps to export the IVR XML file.

6 Procedure

- 7 1. Log in to the Avaya Cloud Office™ account.
- 8 2. Go to **Admin Portal > Phone System > Auto-Receptionist > IVR Editor**.
- 9 3. In the XML Editor section, click **Export IVR XML File**.
- 10 4. Edit the downloaded XML file to change IVR menu names, update extension numbers, and
11 add more menu destinations and functions.
- 12 5. Save the file after making necessary changes.

13 Importing XML File

14 About this task

15 This procedure outlines the steps to import an XML file.

16 Procedure

- 17 1. Log in to the Avaya Cloud Office™ account.
- 18 2. Go to **Admin Portal > Phone System > Auto-Receptionist > IVR Editor**.
- 19 3. Edit the downloaded sample export IVR XML file to create your IVR menus and save.
- 20 4. Ensure the XML file adheres to the correct format to prevent errors.
- 21 5. In the XML Editor section, click **Import XML file** to upload the XML file.
- 22 6. Select the XML file and click **Open**.
- 23 7. The **IVR Import Issues** window displays the detected configuration issues.
- 24 8. Click **Abort Import** to resolve the error messages.
- 25 9. Click **Accept and Continue** to accept the issues and resolve them later.

1 IVR XML Editor

2 XML Editor

3 The XML Editor helps you create and manage IVR menus on the Avaya Cloud Office™ account for
4 quick deployment or bulk changes.

5 Download Sample IVR XML Files

6 Download the following sample IVR XML Files:

- 7 • **Single Level IVR:** Creates one IVR menu.
- 8 • **Multi-level IVR:** Creates an IVR menu tree that uses multiple sub-menus to offer a more
9 complex list of options.

10 You can export and import IVR XML files. Any change to the IVR menu overwrites the imported
11 XML file. After exporting the IVR XML file, save a new XML file with the changes made.

Chapter 17: Working with reports

Viewing Company Number reports

About this task

This procedure outlines the steps to view the company number reports for the selected period. The company number report contains an overview of the details of the company numbers. The report also presents the details of calls made to a company number in graphical form. The details include the origin of the calls, call holds and missed calls for specific groups.

Procedure

1. Log in to the Avaya Cloud Office™ account.
2. Go to **Admin Portal > Reports > Analytics > Company Numbers**.



3. Click  or **Yesterday** label to select the date and time.

4. Click **Done**.



5. Click  at the top-right corner of the page and assign a name to save the report.



6. Click  to download the report as **Excel file** and **PDF file**.

7. Open the saved file to view the report.

Managing Company Number reports

About this task

This procedure outlines the steps to present the company number reports for the selected columns and parameters. The company number provides an overview of KPI details, a graphical presentation of the selected data in the trend section, and call details.

Procedure

1. Log in to the Avaya Cloud Office™ account.

2. Go to **Admin Portal > Reports > Analytics > Company Numbers**.



3. Click  or **Yesterday** label to select the date and time.

4. Click **Done**.

5. Click **Select KPIs** to select the columns to include in the report.

6. Click **Done**.

7. In the **Company Numbers** section, click **Select Columns** to select the columns to display the information in the associated table and include it in the report.

8. Click **Done**.

9. Click  at the top-right corner of the page and assign a name to save the report.

10. Click  to download the report as **Excel file** and **PDF file**.

Downloading Company Number reports

About this task

This procedure outlines the steps to download the company number reports. The company number provides an overview of all inbound, answered, and missed calls, including voicemail and also presents the average handle time the user spends on calls on a company number. The handle time includes live talk time plus time on hold.

Procedure

1. Log in to the Avaya Cloud Office™ account.

2. Go to **Admin Portal > Reports > Analytics > Company Numbers**.

3. In the **Numbers** tab, you can customize the following sections to filter the report according to **Company Numbers**, **Call Length**, and **Site Calls**:

- KPIs section: Customizes the metrics displayed on the Trend section through tabs.
- Trend section: Displays a graphical presentation of the selected data from the KPIs section. This section displays hourly data.
- Company Numbers section: Displays a report with data on the company number, inbound, answered, and missed calls, average handle time, holds, and average hold time.

4. In the **Calls** tab, you can search calls, and filter by Company Numbers and Call Length. The search result displays the following information:

- Number of the caller

- Called numbers
- Result of the call
- Length of the call
- Handle time
- Start time of the call
- Direction of the call
- Number of queues the call went through
- Session map

5. Click  at the top-right corner of the page and assign a name to save the report.

6. Click  to download the report as **Excel file** and **CSV file**.

Subscribing to Company Number reports

About this task

This procedure outlines the steps to subscribe to saved company number reports in Avaya Cloud Office Analytics. It helps users generate and send performance reports through email.

Procedure

1. Log in to the Avaya Cloud Office™ account.
2. Go to **Admin Portal > Reports > Analytics > Subscriptions**.
3. In the **Subscriptions** menu, select **Performance Reports Subscriptions**.
4. Click the **Create New** tab.
5. In the **General information** section, enter the following information:
 - **Subscription Name**: Enter the subscription name.
 - **Report Type**: Select the report type as **Company numbers**.
 - **Report**: Select from the saved reports.
 - **Tabs**: Select **Numbers**, **Calls**, or both options.
6. Click **Go to Report** to open the report in a new tab and review the parameters.
7. In the **File Type** section, select **Excel** or **PDF**.
8. In the **Email the report to** section, enter the email address to send the report.
9. In the **Email Delivery Schedule** section, select the **Frequency** to deliver the report through Email.

10. Click **Create**.

The subscription to the company numbers reports is created.

11. Go to the **Subscriptions** menu, select **Business Analytics Subscriptions**.

12. Click the **Create New** tab.

13. In the **General information** section, enter the following information:

- **Subscription Name:** Enter a name to save the subscription.
- **Description:** Enter the description of the report contents.
- **Dashboard:** Select **Company Numbers Dashboard - Default** from the drop-down list.

14. In the **File Type** section, select the file type as **Excel**.

15. In the **Email the report to** section, enter the email address to send the report.

16. In the **Email Delivery** section, select the **Time Zone**, **Start Date**, **End Date**, and **Frequency** to send the report by Email.

17. Select the **No End Date** check box if required.

18. Click **Create**.

The subscription to the company numbers reports is created.

Performance reports

Performance reports

The Performance report is essential to monitor resource utilization and business performance over time. The report also helps track individual performance, responses, and trends over time.

The report also enables the user to improve communication, decision-making, identify potential problems, create strategies, and increase productivity. The amount of data available for the performance report depends on the set period, **Queues**, **Users**, **Calls**, and **Meetings**.

Viewing Performance Reports

About this task

This procedure outlines the steps to view the performance reports. This report tracks information about the queues, users, calls, and meeting statistics.

Procedure

1. Log in to the Avaya Cloud Office™ account.
2. Go to **Admin Portal > Reports > Analytics > Performance Reports**.

1 The browser window displays the Performance Reports page.

2 Managing Performance Reports

3 About this task

4 This procedure outlines the steps to manage the performance reports. The performance report
5 contains information about resource utilization for the specified period. This report provides an
6 overview of the queue details, call types, call lengths, meeting details, trends, and KPIs.

7 Procedure

- 8 1. Log in to the Avaya Cloud Office™ account.
- 9 2. Go to **Admin Portal > Reports > Analytics > Performance Reports**.
- 10 3. In the **Queues** tab, you can customize the following sections to filter the report according
11 to **Queues, Call Type, Call Length, and Site Calls**:
 - 12 • KPIs section: Customizes the metrics to present in the Trend section through tabs.
 - 13 • Trend section: Displays a graphical presentation of the selected data from the KPIs
14 section. This section displays hourly data.
 - 15 • Queues group Name section: Displays a report with the data of group names, extension,
16 number of inbound, answered, abandoned calls, the average handle time, the number of
17 holds, and the refused calls.
- 18 4. In the **Users** tab, customize the following sections to filter the report according to **Users /**
19 **User Groups / Departments / IVRs, Call Type, Queue calls, Call Length, and Site**
20 **Calls**:
 - 21 • KPIs section: Customizes the metrics to present on the Trend section through tabs.
 - 22 • Trend section: Displays a graphical presentation of the selected data from the KPIs
23 section. This section displays hourly data.
 - 24 • Name section: Displays a report with data on group names, extensions, inbound,
25 answered, abandoned, average handle time, holds, and refused calls.
- 26 5. In the **Calls** tab, customize the following sections to filter the report according to **Users /**
27 **User Groups / Departments / IVRs / Queues, Call Type, Queue calls, Call Length, and**
28 **Site Calls**:
 - 29 • Number of the caller
 - 30 • Called numbers
 - 31 • Result of the call
 - 32 • Length of the call
 - 33 • Handle time

- Start time of the call
 - Number of queues the call went through
 - Direction of the call
6. In the **Meetings** tab, customize the following sections to filter the report according to **Users / User Groups / Departments**:
- Topic / Meeting ID
 - Participants
 - Endpoints
 - Host
 - Length of the call
 - Start time of the call
 - End time of the call
 - Activities
7. Click  at the top-right corner of the page and assign a name to save the report.

Downloading performance reports

About this task

This procedure outlines the steps to download the performance reports after managing the parameters in the respective sections.

Procedure

1. Log in to the Avaya Cloud Office™ account.
2. Go to **Admin Portal > Reports > Analytics > Performance Reports**.



3. Click  to select the duration.



4. In the **Queues** and **Users** tab, click  to download the report as **Excel file** and **PDF file**.



5. In the **Calls** tab, click  to download the report as **Excel file** and **CSV file**.

6. In the **Meetings** tab, click  to download the report as **Excel file**.

Subscribing to performance reports

About this task

This procedure outlines the steps to subscribe to a saved report in the Avaya Cloud Office Analytics. It helps users generate and send performance reports through email.

Procedure

1. Log in to the Avaya Cloud Office™ account.
2. Go to **Admin Portal > Reports > Analytics > Subscriptions**.
3. On the Home page, in the navigation pane, click the following tabs to generate the reports:
 - **Performance Reports Subscriptions**: Click to automatically generate saved reports and send them through email to recipients.
 - **Business Analytics Subscriptions**: Select the drop-down options from the **STATUS**, **DELIVERY**, and **DASHBOARD** sections to configure the report. Click **Delete Subscriptions** to delete the available subscriptions.
 - **All subscriptions**: Select the drop-down options from **STATUS**, **DELIVERY**, and **DASHBOARD** sections to configure the report.
4. Click the **Create New** tab to select the following subscription types:
 - **Business Analytics Subscriptions**
 - **Performance Reports Subscriptions**
5. In the **Business Analytics Subscriptions**, enter the following information to create a new subscription:
 - **General information**: Enter the subscription name, description, and select the dashboards.
 - **File**: Select the Excel file format.
 - **Email Delivery**: Select the time zone, start and end dates, frequency, and day of the month.

 **Note:**

²⁷ The option to select **No End Date** is available with a check box.

 - **Email the report to**: Enter the email address to send the report.
6. Click **Create**.

7. In the **Performance Reports Subscriptions**, enter the following information to create a new subscription:
 - **General information:** Enter the subscription name, select the report type, and save the report.
 - **File:** Select the file format from Excel and PDF.
 - **Email Delivery Schedule:** Select the frequency from monthly or weekly.
 - **Email the report to:** Enter the email address to send the report.
8. Click **Create**.

Viewing Adoption and Usage reports

About this task

The Adoption and Usage Reports provide insight into the usage level, preferences, and patterns of an organization. This procedure outlines the steps to view the adoption and usage reports for the selected period. This report also helps implement initiatives to improve adoption and track impact.

Procedure

1. Log in to the Avaya Cloud Office™ account.
2. Go to **Admin Portal > Reports > Analytics > Adoption & Usage**.
3. Click  or **Yesterday** label to select the date range to assess the usage pattern of the organization.
4. Click **Done**.
5. Click the **Overview** tab to view a grouped view of active users, product usage, trends, frequency, and adoption patterns across departments.
6. Click the **Message** tab to view key metrics for KPIs, active users, usage patterns by activity and team, frequency, and active user trends for messaging.
7. Click the **Video** tab to view the key metrics for KPIs, active users, usage patterns by host and participants, active user trends, frequency, and user list for video products.
8. Click the **Phone** tab to view key metrics for KPIs, active users, usage patterns by frequency, active user trends, and the user list for phone products.

1 Managing Adoption and Usage reports for overview

2 About this task

3 The Adoption and Usage report for **Overview** provides insight into usage levels and patterns, user
4 preferences, user groupings, and data adoption within an organization. The overview report helps
5 in identifying barriers to adoption and utilization patterns to improve user management.

6 Procedure

- 7 1. Log in to the Avaya Cloud Office™ account.
- 8 2. Go to **Admin Portal > Analytics & Logs > Analytics > Adoption & Usage**.



- 9 3. Click  to select from the **Yesterday, Last 7 Days, Last Work Week, Last 30**
10 **Days**, or **Last Month** label to select the date range to assess the overview data of the
11 organization.
- 12 4. Click **Done**.
- 13 5. Click the **Overview** tab to view data on Active Users, Total Enabled Users, Active User
14 Trend, Device Type, and Usage Frequency for enabled message, video, and phone users.
- 15 6. In the Active Users section, click the **By Department** tab to view the usage percentages
16 for messages, videos, and phones.
- 17 7. Click the **By Site** tab and access your account on the web to add sites for your company.

18 Managing Adoption and Usage reports for message

19 About this task

20 The Adoption and Usage report for **Message** provides an aggregated view of key metrics, usage
21 frequency, active user trends, levels and patterns, preferences, user groupings, and adoption of
22 the message feature within an organization.

23 Procedure

- 24 1. Log in to the Avaya Cloud Office™ account.
- 25 2. Go to **Admin Portal > Analytics & Logs > Analytics > Adoption & Usage**.



- 26 3. Click  to select from the **Yesterday, Last 7 Days, Last Work Week, Last 30**
27 **Days**, or **Last Month** label to select the date range to assess the overview data of the
28 organization.
- 29 4. Click **Done**.

5. In the KPIs section, click **Select KPIs** to select from the following preferences to display the required parameters:
 - Enabled Message Users
 - # of Messages
 - # of Teams
 - # of Direct Groups
 - # of Team Messages
 - # of Direct 1:1 Messages
 - # of Direct Group Messages
 - % of Team Messages
 - % of Direct 1:1 Messages
 - % of Direct Group Messages
 - Avg. Teams Per Users
 - Avg. Messages Per User
6. In the Active Users section, click the numerical value to view the list of total active users available at a site.
7. In the Usage Frequency section, select the department and sites to display the Unspecified and Company data.
8. Select from the following options to display the frequency usage data:
 - Very Frequently
 - Occasionally
 - Non Users
 - Frequently
 - Rarely
9. In the Active User Trend section, click the toggle switch to activate comparing the data with the previous period for the given department and sites.
10. In the Top Endpoints & Versions section, select the departments and sites to view the relevant data in graphic form.
11. In the User Table section, click **Select Columns** to select from the following options to present the data:
 - Endpoint
 - Last Used
 - Site
 - Usage Count

- Usage Frequency

- Version

12. Click **Done**.

Managing Adoption and Usage reports for video

About this task

The Adoption and Usage report for **Video** provides an aggregated view of key metrics, usage frequency, active user trend, endpoints and versions, preferences, user groupings, and adoption of the video feature within an organization.

Procedure

1. Log in to the Avaya Cloud Office™ account.

2. Go to **Admin Portal > Analytics & Logs > Analytics > Adoption & Usage**.



3. Click  to select from the **Yesterday**, **Last 7 Days**, **Last Work Week**, **Last 30 Days**, or **Last Month** label to select the date range to assess the overview data of the organization.

4. Click **Done**.

5. In the KPIs section, click **Select KPIs** to select from the following preferences to display the required parameters:

- Enabled Video Users
- # of Meetings
- Total Meeting Min
- Unique Hosts
- Unique Participants
- Avg. Meetings Per User
- Avg. Min Per User
- Avg. Participants Per Meeting
- Avg. Min Per Meeting

6. In the Active Users section, click the numerical value to view the list of total active users available at a site.

7. In the Usage Frequency section, select the department and sites to display the Unspecified and Company data.

8. Select from the following options to display the usage frequency data:

- Very Frequently

- Occasionally
 - Non Users
 - Frequently
 - Rarely
9. In the Active User Trend section, click the toggle switch to activate comparing the data with the previous period for the given department and sites.
 10. In the Features Usage section, select the departments and sites to view the audio, video, screen sharing, and recording data in graphic form.
 11. In the Top Endpoints & Versions section, select the departments and sites to view the relevant data in graphic form.
 12. In the User Table section, click **Select Columns** to select from the following options to present the data:
 - # Hosted
 - # Of Meetings
 - # Participated
 - Department
 - Endpoint
 - Hosted Minutes
 - Last Used
 - Meeting Minutes
 - Participated Minutes
 - Site
 - Usage Count
 - Usage Frequency
 - Version
 13. Click **Done**.

Managing Adoption and Usage reports for phone

About this task

The Adoption and Usage report for **Phone** provides an aggregated view of key metrics, usage frequency, active user trend, top endpoints, user groupings, and adoption of the phone feature across an organization.

Procedure

1. Log in to the Avaya Cloud Office™ account.
2. Go to **Admin Portal > Analytics & Logs > Analytics > Adoption & Usage**.



3. Click  to select from the **Yesterday**, **Last 7 Days**, **Last Work Week**, **Last 30 Days**, or **Last Month** label to select the date range to assess the overview data of the organization.
4. Click **Done**.
5. In the KPIs section, click **Select KPIs** to select from the following preferences to display the required parameters:
 - Enabled Phone Users
 - # of Calls
 - Total Call Min
 - # of Inbound Calls
 - Inbound Call Min
 - # of Outbound Calls
 - Outbound Call Min
 - # of External Calls
 - External Call Min
 - # of Internal Calls
 - Internal Call Min
 - Avg. # of Calls Per User
 - Avg. Min Per User
6. In the Active Users section, click the numerical value to view the list of total active users available at a site. The top ten active users list is also visible with the call details.
7. In the Usage Frequency section, select the department and sites to display the Unspecified and Company data.
8. Select from the following options to display the usage frequency data:
 - Very Frequently
 - Occasionally
 - Non Users
 - Frequently
 - Rarely
9. In the Active User Trend section, click the toggle switch to activate comparing the data with the previous period for the given department and sites.
10. In the Features Usage section, select the departments and sites to view the audio, video, screen sharing, and recording data in graphic form.

11. In the Top Endpoints & Versions section, select the departments and sites to view the relevant data in graphic form.
12. In the User Table section, click **Select Columns** to select from the following options to present the data:
 - # Of Calls
 - Call Minutes
 - Department
 - Endpoint
 - Last Used
 - Site
 - Usage Count
 - Usage Frequency
 - Version
13. Click **Done**.

Creating a dashboard

About this task

The dashboard is a visual interface that consolidates key performance indicators and data from multiple sources, providing a centralized view of KPIs, trends, and data related to calls for performance improvement for real-time monitoring.

Procedure

1. Log in to the Avaya Cloud Office™ account.
2. Go to **Admin Portal > Analytics & Logs > Analytics**.
3. Click **Business Analytics**.
4. Click the **Dashboard** drop-down menu and select from the following:
 - Call Records Dashboard - Default
 - Company Numbers Dashboard - Default
 - Meetings Dashboard - Default
 - Queues Dashboard - Default
 - Users Dashboard - Default
5. Click **Add Dashboard** to add a new dashboard.
6. Add a descriptive name for the new dashboard.

7. Under the **Select Privacy Settings** section, select the applicable privacy settings from the following options:
 - Private - visible only to me.
 - Public - visible to anyone with access to Business Analytics.
 - Shared - visible to a specific group of people.
8. For the **Public** and **Shared** privacy setting options, click the **Show dashboard data identical to my view** check box to enable users to view the data.
9. For the **Shared** privacy setting, in the **USERS** section, select the following to provide access to view dashboard data:
 - **Users**
 - **Departments**
 - **User Groups**
10. Click **Done**.
11. Click **Save**.

Creating a widget

About this task

The widget in Avaya Cloud Office workspace helps the user to perform a function or access a service. The user can configure these widgets for the tasks and generate the required reports.

Procedure

1. Log in to the Avaya Cloud Office™ account.
2. Go to **Admin Portal > Analytics & Logs > Analytics**.
3. Click **Business Analytics**.
4. Click **Add Widget** to create a new widget and select from the following:
 - **Table**
 - **KPIs**
 - **Meetings**
 - **Call Records**
 - **Graph**
5. Click **Cancel** to discard the widget.

1 Creating and managing table widget

2 About this task

3 The table widget with custom rows and columns details call handling information. This procedure
 4 for creating a table widget analyzes data by users, queues, departments, and both percent and
 5 average metrics. It also provides a comparative analysis across different user groups for the
 6 selected period.

7 Procedure

- 8 1. Log in to the Avaya Cloud Office™ account.
- 9 2. Go to **Admin Portal > Analytics & Logs > Analytics**.
- 10 3. Click **Business Analytics**.
- 11 4. Click **Add Widget**.
- 12 5. Select **Table**.
- 13 6. In the **Widget Name** field, enter a name for your widget.
- 14 7. Double-click or drag and drop an item on the **Rows** list to add it to the table.
- 15 8. Double-click or drag and drop an item on the **Columns** list to add it to the table.
- 16 9. Click **Add summary** below the last row in the table to select the summary aggregation
 17 function with the following options:
 - 18 • **Sum**
 - 19 • **Avg**
 - 20 • **Min**
 - 21 • **Max**
 - 22 • **%**
- 23 10. Click **Save**.
- 24 11. Click the six-dot icon next to the column name to drag and drop the columns to rearrange
 25 the order.
- 26 12. In the Rows Filters section, select the item in the **Rows** list and select the information.
- 27 13. Click **Done**.
- 28 14. Click  in the Rows Filters field to clear your selection.
- 29 15. In the Data Filters section, click **Add Filter** in the filter box to select the following filters:
 - 30 • **Origin**
 - 31 • **Direction**
 - 32 • **Call response**
 - 33 • **Call type**

- Result
- To/From extensions
- Ending party
- Call length
- Time spent
- Actions
- Call segment
- Numbers called

16. Click **Clear** at the top-right corner to undo the last change in the table widget.

17. Click **Save**.

The table widget is saved in the dashboard. You can perform actions by clicking the three-dot icon at the top-right of the widget.

18. Click the three-dot icon  to select from the following options:

Edit: Open the table widget page to make changes.

Size: Resize the widget in the dashboard.

Duplicate: Create a copy of the table widget.

Delete: Remove the table widget.

Creating and managing meetings widget

About this task

The meetings widget analyzes user's participation in meetings and engagements. This widget enables the user to search and filter by users or groups, and to retrieve detailed information on each participant and the actions taken during the meeting. This procedure outlines the steps to create and manage the meetings widget.

Procedure

1. Log in to the Avaya Cloud Office™ account.
2. Go to **Admin Portal > Analytics & Logs > Analytics**.
3. Click **Business Analytics**.
4. Click **Add Widget**.
5. Select **Meetings**.
6. In the **Widget Name** field, enter a name for your widget.
7. Click **Save**.

The meetings widget displays the following information for meetings:

- Topic/Meeting ID
- Participants
- Endpoints
- Host
- Length
- Start Time
- End Time
- Activities



8. Click the  calendar icon at the right of the widget name to select the specific date, period, and hours.
9. Click **Done** to save your preferences.
10. Click the **Data Filters** field to find a specific meeting.
11. Click the **Select users to filter data** drop-down list in the **Users** field to filter data from the following categories:
 - Users
 - Departments
 - User Groups
12. Click **Done** to save your preferences.
13. Click **Clear** at the upper right to undo your last change to the meetings widget. It disappears after you click it and reappears when you make your next change.
14. Click **Save**.

The meetings widget displays the following information for meetings:

- Topic/Meeting ID
- Participants
- Endpoints
- Host
- Length
- Start Time
- End Time
- Activities

The meetings widget is saved in the dashboard. You can perform actions by clicking the three-dot icon at the top-right of the widget.

15. Click the three-dot icon  to select from the following options:

Edit: Open the meetings widget page to make changes.

Size: Resize the widget in the dashboard.

Duplicate: Create a copy of the meetings widget.

Delete: Remove the meetings widget.

Creating and managing trend graph widget

About this task

The graph widget creates a visual representation of the trend in data. It enables the user to visualize call-handling patterns over time and identify peaks and dips in the trend. This procedure outlines the steps to create and manage the trend graph widget.

Procedure

1. Log in to the Avaya Cloud Office™ account.
2. Go to **Admin Portal > Analytics & Logs > Analytics**.
3. Click **Business Analytics**.
4. Click **Add Widget**.
5. Select **Graph**.
6. Click **Trend**.
7. In the **Widget Name** field, enter a name for your widget.



8. Click the  calendar icon to the right of the widget name to select the specific date, period, and hours.
9. Click **Done** to save your preferences.
10. Double-click or drag items from the **X-Axis Types** section to add them to the graph. Hover over the information icon to view the definition of each metric.
11. In the **Y-Axis Dimension Filters** field, click the **Dimension** drop-down to select a metric from the following:
 - All
 - Users
 - Queues
 - User Groups

- Departments
- Company Numbers
- IVRs
- Shared Line Groups

12. In the Data Filters section, click **Add Filter** in the filter box to select the following filters:

- Origin
- Direction
- Call response
- Call type
- Result
- To/From extensions
- Ending party
- Call length
- Time spent
- Actions
- Call segment
- Numbers called

13. Click **Add Aggregation Function** to add the following two types of aggregated data:

- **Calls:** % of Calls.
- **Time spent:** Sum of Time Spent, Average Time Spent, % of Time Spent.

14. Click **Save** to save your preferences.

15. Click **Clear** at the top-right to undo the last change in the trend graph widget.

16. Click **Save**.

The trend graph widget is saved in the dashboard. You can perform actions by clicking the three-dot icon at the top-right of the widget.

17. Click the three-dot icon  to select from the following options:

Edit: Open the trend graph widget page to make changes.

Size: Resize the widget in the dashboard.

Duplicate: Create a copy of the trend graph widget.

Delete: Remove the trend graph widget.

1 Creating and managing comparison graph widget

2 About this task

3 The graph widget creates a visual representation of the data comparison. It enables the user to
4 compare multiple members and their performance for inbound and outbound calls.

5 Procedure

- 6 1. Log in to the Avaya Cloud Office™ account.
- 7 2. Go to **Admin Portal > Analytics & Logs > Analytics**.
- 8 3. Click **Business Analytics**.
- 9 4. Click **Add Widget**.
- 10 5. Select **Graph**.
- 11 6. Click **Comparison**.
- 12 7. In the **Widget Name** field, enter a name for your widget.



- 13 8. Click the  calendar icon to the right of the widget name to select the specific date,
14 period, and hours.
- 15 9. Click **Done** to save your preferences.
- 16 10. Double-click or drag items from the **Y-Axis Types** section to add them to the graph. Hover
17 over the information icon to view the definition of each metric.
- 18 11. Double-click or drag items from the **X-Axis Types** section to add them to the graph. You
19 can select more than one item from the X-axis list. Hover over the information icon to view
20 the definition of each metric.
- 21 12. In the **Y-Axis Dimension Filters** field, click the **Dimension** drop-down to select a metric
22 from the following:
 - 23 • All
 - 24 • Users
 - 25 • Queues
 - 26 • User Groups
 - 27 • Departments
 - 28 • Company Numbers
 - 29 • IVRs
 - 30 • Sites
 - 31 • Shared Line Groups
- 32 13. Select the data to appear in the widget and click **Done**.

14. In the Data Filters section, click **Add Filter** in the filter box to select the following filters:

- Origin
- Direction
- Call response
- Call type
- Result
- To/From extensions
- Ending party
- Call length
- Time spent
- Actions
- Call segment
- Numbers called

15. Click **Clear** at the top-right to undo the last change in the comparison graph widget.

16. Click **Save**.

The comparison graph widget is saved in the dashboard. You can perform actions by clicking the three-dot icon at the top-right of the widget.

17. Click the three-dot icon  to select from the following options:

Edit: Open the comparison graph widget page to make changes.

Size: Resize the widget in the dashboard.

Duplicate: Create a copy of the comparison graph widget.

Delete: Remove the comparison graph widget.

Creating and managing KPIs widget

About this task

The KPI widget enables users to create custom and preset key performance indicators across various metrics. The KPI widget tracks and monitors the performance of the queues or teams. It enables the user to create multiple widgets with custom metrics using available filters and compare them to analyze performance across different periods, regions, departments, and other categories.

Procedure

1. Log in to the Avaya Cloud Office™ account.
2. Go to **Admin Portal > Analytics & Logs > Analytics**.

3. Click **Business Analytics**.
4. Click **Add Widget**.
5. Select **KPIs**.
6. In the **Widget Name** field, enter a name for your widget.



7. Click the  calendar icon to the right of the widget name to select the specific date, period, and hours.
8. Click **Done** to save your preferences.
9. From the **Preset KPIs** section, double-click or drag and drop any of the following items to add them to your widget:
 - # Total Calls
 - # Inbound
 - # Outbound
 - # Answered
 - # Missed with VM
 - # Missed without VM
 - # Abandoned
 - # with Holds
 - # with Transfers
 - # with Park
 - # with Park Retrieval
 - Total handle Time
 - Avg. Speed of Answer
 - Total Hold Time
 - Avg. # Calls/Day
 - Avg. Handle Time
10. In the **Custom KPIs** section, you can customize the available item by making changes to the **Details** and **Formula** fields.
11. For the **Preset KPIs** section, in the Details field, keep the information the same or create a new KPI name and description to save it as a new metric.
 - **KPI name:** Keep the same name or create a new one.
 - **Description:** Enter the information related to the KPI metrics.

12. In the Formula field, select the following:

- **Group By:** Change and select the dimension and the users to include in the KPI metrics.
- **Aggregation Function:** Select from the calls and time-spent metrics, including their frequencies. Click **Save**.
- **Metrics:** Select the metric to display for the custom KPI.
- **Apply Filters:** Change your filter settings based on origin, direction, call response, call type, result, and other options in the list.

13. Click **Save KPI As...** and select at least one from the following options:

- Add Custom KPI to the Custom KPIs list.
- Add Custom KPI in the Widget Holder.

14. Click **Save**.

15. Click **Clear** at the top-right to undo the last change in the KPIs widget.

16. Click **Save** at the top-right.

The KPIs widget is saved in the dashboard. You can perform actions by clicking the three-dot icon at the top-right of the widget.

17. Click the three-dot icon  to select from the following options:

Edit: Open the KPIs widget page to make changes.

Size: Resize the widget in the dashboard.

Duplicate: Create a copy of the KPIs widget.

Delete: Remove the KPIs widget.

Creating and managing call records widget

About this task

The Call Records widget enables users to perform a comprehensive analysis of all calls in the organization. The widget shows the journey of a call, with a variety of customization options and filters. The user can access and download call recordings. This procedure outlines the steps to create and manage the call records widget.

Procedure

1. Log in to the Avaya Cloud Office™ account.
2. Go to **Admin Portal > Analytics & Logs > Analytics**.
3. Click **Business Analytics**.
4. Click **Add Widget**.
5. Select **Call Records**.

6. In the **Widget Name** field, enter a name for your widget.



7. Click the calendar icon at the right of the widget name to select the specific date, period, and hours.

8. Click **Done** to save your preferences.

9. The **Default Columns** available in the call records widget are the following:

- **From**
- **To**
- **Date/Time**
- **Length**
- **Direction**
- **Call Type**
- **Call Response**
- **Result**

10. In the **Rows Filters** section, click the **Search Calls** field to find a specific call record. You can search by name or number.

11. Click the **Dimension** drop-down to select a metric from the following:

- Users
- Queues
- Queues Agents
- User Groups
- Departments
- IVRs

12. Click the **Users** drop-down to select a metric from the following:

- Users
- Departments
- Queues
- User Groups

13. Click **Done** to save the preferences.

14. In the Data Filters section, click **Add Filter** in the filter box to select the following filters:

- Origin
- Direction

- Call response
- Call type
- Result
- Ending party
- Call length
- Time spent
- Actions
- Call segment

15. Click the  icon to delete columns.

16. Double-click or drag items from the **Configurable Columns** section to access more specific data within the call records. Hover over the information icon to view the definition of each metric.

- **Call Segment**
- **Origin**
- **Call ID**
- **Hop ID**
- **Recording**

17. Click **Clear** at the top-right to undo the last change in the call records widget.

18. Click **Save** at the top-right.

The call records widget is saved in the dashboard. You can perform actions by clicking the three-dot icon at the top-right of the widget.

19. Click the three-dot icon  to select from the following options:

Edit: Open the call records widget page to make changes.

Size: Resize the widget in the dashboard.

Duplicate: Create a copy of the call records widget.

Delete: Remove the call records widget.

Deleting a dashboard

About this task

This procedure outlines the steps to select and remove a dashboard with outdated and irrelevant information. It helps simplify the data view for users and maintain relevant metrics.

Procedure

1. Log in to the Avaya Cloud Office™ account.
2. Go to **Admin Portal > Analytics & Logs > Analytics**.
3. Click **Business Analytics**.
4. Click the **Dashboard** drop-down menu and select the dashboard you have created.
5. Click  to remove the selected dashboard.
6. Click **Delete**.

Viewing and filtering activities in the Audit Trail

About this task

The audit trail record assists the user and admin in tracking changes to the account and in generating a report.

Procedure

1. Log in to the Avaya Cloud Office™ account.
2. Go to **Admin Portal > More > Audit Trail**.
3. Click the search bar to locate a specific change, click  to select the period.
4. Click the **Filter** icon to filter with the following:
 - **Change by**: The admin who updated the account.
 - **Change to**: The updated user accounts.
 - **Items Affected**: The specific changes made while updating the user account.
5. Click **Apply**.

Downloading Audit Trail records

About this task

This procedure outlines the steps to filter the audit trail records and download them in XLSX format.

Procedure

1. Log in to the Avaya Cloud Office™ account.

2. Go to **Admin Portal > More > Audit Trail**.

3. Click  to download the report as an XLSX file that includes the following fields:

- **Date / Time:** Date and time of the modifications.
- **Changes made by:** Changes made by the admin to the account.
- **Change made to:** Changes made to the specific account.
- **Item affected:** The modified setting.
- **Change details:** The description of the change.

Draft

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