ESI eCloud

Customer Admin Guide for Provisioning and Managing ESI eTeams™ User's

This document provides an overview of the capabilities in the Enterprise Connector Portal that manages the connection and the Teams users at an enterprise using **eTeams**.

Contents

Introduction

This document provides an overview of the capabilities in the Enterprise Connector Portal that manages the connection and the Teams users at an enterprise level using **eTeams**. The target audience includes:

- Customer Admins of **eTeams**
- ESI Tech Support
- ESI Platform Operations

ESI tailors a URL for each business to provide each customer with access to a custom portal for managing their users. The admin users of the customer portal allocate users within the purchased number of **eTeams** licenses by adding and deleting users.

This document uses the URL "eTeams-For-ESI.connecttoteams.com" to demonstrate how ESI administrators provision endpoints for ESI users who use Teams with the eCloud PBX system. The eTeams-For-ESI.connecttoteams.com portal provides the images and descriptions in this document.

This document describes the following:

1. Several "Quick Steps" explain how to add and delete users, how to reset a user's password, and how to access the Enterprise Portal. For information about the correct values to place in the fields, subsequent sections in this document provide these details.
2. "Managing Users" describes in detail how to add a user or set of users to **eTeams** on an existing eCloud offering.
3. "Managing eTeams Settings" illustrates adding or changing settings on the Enterprise Portal.
4. Details on confirming the direct routing that allows the **eTeams** connector to work, including the fields for adding or changing features on the Enterprise Portal.

Quick Step – Adding a New User

1. Log in to Enterprise Portal
2. Click on User Management in Main Menu
3. Click on Add User in Main Menu
4. Fill in "Add User Fields" using the following values in the dropdowns:
   a. <u>PBX Locations</u>: Select "PBX HQ" in dropdown
   b. <u>Available Voice Routes</u>: Select "US East 1" in dropdown
   c. <u>Teams User</u>: Select the Microsoft Teams ID from the dropdown.
   d. <u>SIP User</u>: Select the SIP user being added from the dropdown.
   e. <u>Phone Number</u>: Confirm that the number populated in the field is the correct DID for that user. If the number is the common business number, enter the user's 10-digit DID.
   f. <u>Disable Voicemail in Teams</u>: ensure this box is clicked.
   g. If the SIP user has devices based on SIPAuthentication ID, select the device with "####t" where #### corresponds to the user's extension. If "####t" does not exist, contact ESI Technical Support.
   h. Press gray "Select" button for the corresponding device for **eTeams**.
   i. Press "Add User" button.
5. Click "Sync Teams Users" button in the Enterprise Admin Action Items.
6. Possible Error conditions:
   a. Phone Number in use: a red box appears stating the number is already assigned to another Teams User. The add user failed, so start back on step 3.
   b. No data validation – this is the location where a Teams user (populated in the Microsoft Teams Portal by the customer administrator) gets aligned with a user in the ESI NDP. There is not any cross checking of names, phone numbers, or extensions. Take care to assign a SIP User from the drop-down to the correct Teams user.

   NOTE: The system does not provide any indication of a potential error.

Figure 1: Enterprise > Add User

Quick Step – Deleting a Single User or Multiple Users

1. Log in to Enterprise Portal
2. Click on *User Management* in Main Menu
3. Click on *Manage Users* in Main Menu
   a. To Delete a Single User:
      i. Click the *ellipses* under the Action column for the desired user being deleted
      ii. Click *Delete User* button
      iii. Click the blue *Delete User* button in the confirmation window.

      NOTE: This window states that deleting the user is irreversible. The system removes all settings and calling capabilities for the selected user upon pressing the blue *Delete Users* button.

   b. To Delete Multiple Users:
      i. Click red *Delete Users* Button above the User Table
      ii. Place checks next to the users to be deleted
      iii. Click red *Confirm Delete Users* button to delete all selected users
      iv. Click blue *Delete Users* button in confirmation window

      NOTE: This window states that deleting users is irreversible. The system removes all settings and calling capabilities for each selected user upon pressing the blue *Delete Users* button.
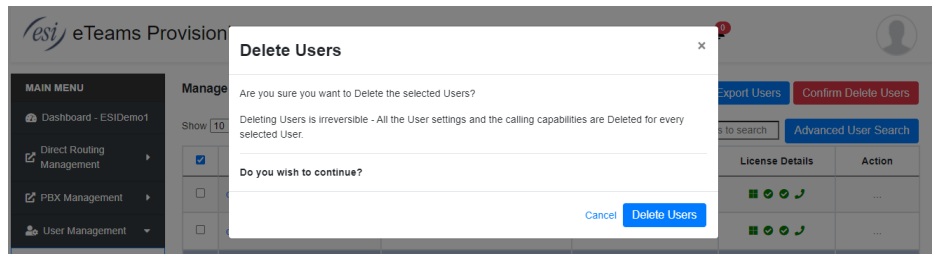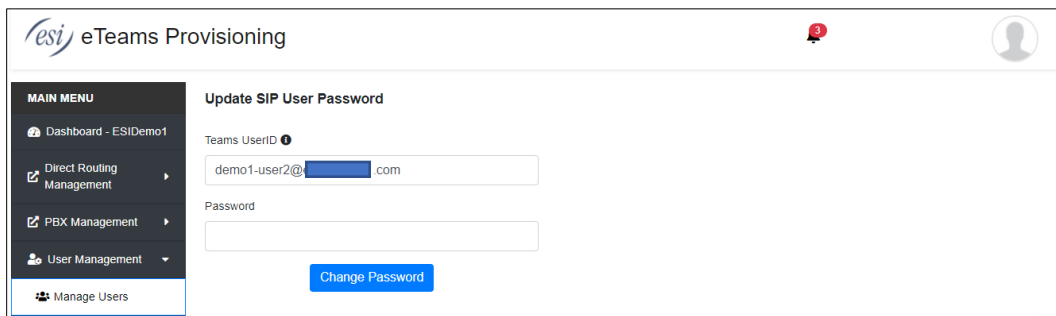

Figure 2: Enterprise > User Management > Delete Users Confirmation

4. A user or group of users deleted from the Enterprise portal remain in the "Manage Users" tab if their Teams account remains in the Teams Admin portal. This user is available to add back to the **eTeams** service, but there are not any other actions available on a Teams User in the enterprise connector portal.

Quick Step – Resetting the Password for a SIP User

1. Log in to Enterprise Portal
2. Click on *User Management* in Main Menu
3. Click on *Manage Users* in Main Menu
4. Select the *ellipses* for the user needing to change their password
5. Select the *Change Password* command from the dropdown menu.
6. Enter a new password in the blank field. The password must be at least eight characters in length and contain both upper- and lower-case letters, at least one special character, and at least one number.

Figure 3: Enterprise > User Management > Manage Users > Change Password

Quick Step – Adding a Group of Users

1. Log in to Enterprise Portal
2. Click on *User Management* in Main Menu
3. Click on *Bulk Upload Users* in Main Menu
4. If Bulk Upload User CSV file is not ready, click *Sample File Format* to download a template to enter the information that will populate the system. See *Adding a Group of Users with "Bulk Upload Users"* below for field definitions
5. See *Create a CSV File* to save the file in CSV format.

NOTE: The Bulk Upload can process only up to 50 users per Upload command.

6. Fill in Bulk Upload Users fields on the page from dropdown menus:
   a. <u>PBX Locations</u>: Click users PBX location in dropdown
   b. <u>Available Voice Routes</u>: Select appropriate route based on user's location from dropdown
   c. <u>Upload Users</u>: Click the gray *Browse* button to navigate with the computer's file system to find the file that contains the CSV file and click the file.

Quick Step – Logging in to the Enterprise Portal

To log into this Enterprise Portal site, the user presses the "Sign In" button on the **eTeams** Provisioning portal. Each **eTeams**-powered business receives an email from ESI when their enterprise is ready for their management. Generally, the URL will be "eTeamsFor<CustomerName>.connecttoteams.com," and the person who is an Administrator for the Microsoft Teams Administration Portal.
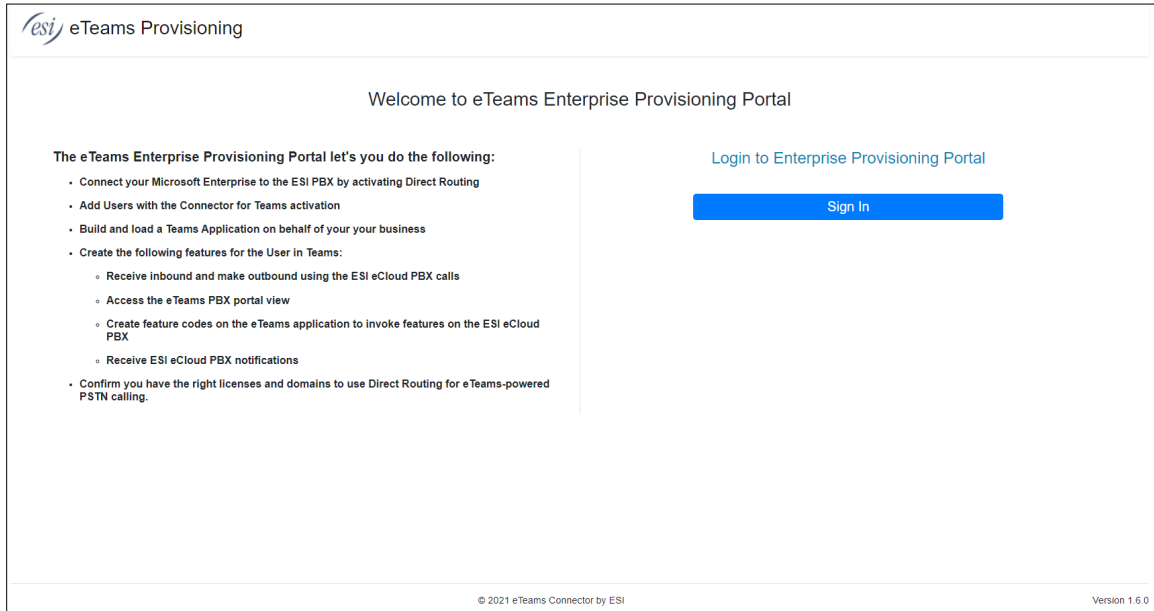

Figure 4. eTeams Enterprise Provisioning Portal Landing Page

The user selects the Microsoft user account that serves as a Teams administrator for this business. After they enter this information the first time, these users show in the dropdown that appears:
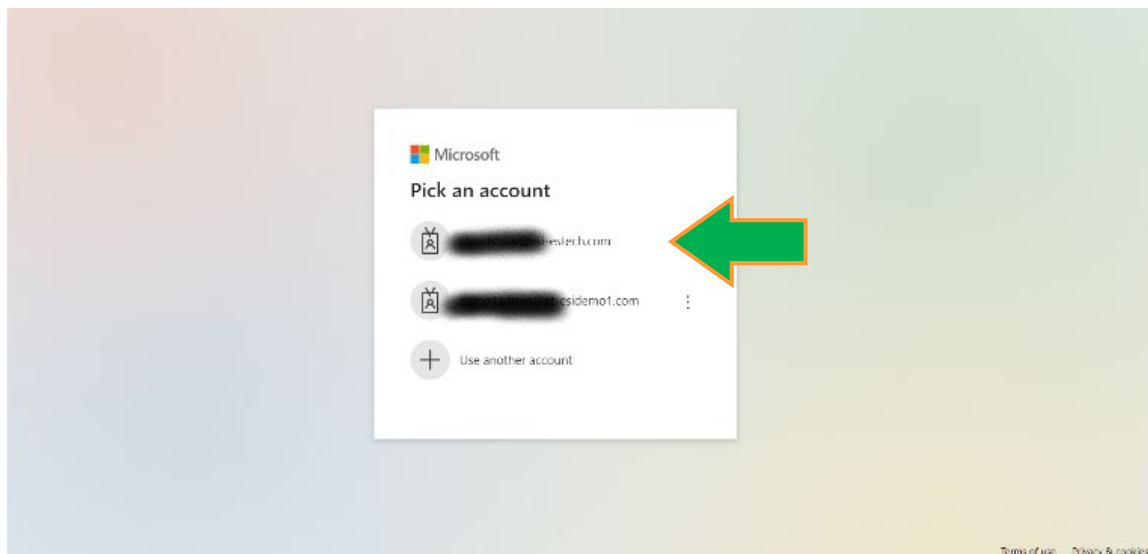

Figure 5. eTeams Enterprise Login Window

eTeams Provisioning Landing Page for the Enterprise Admin User

Upon selecting the account and entering the password, the administrator lands on the Dashboard for the **eTeams** Provisioning site for this business. This portal accesses the information that establishes and controls the **eTeams** Connector and the MS Teams users whose voice calls go over the public phone network.

NOTE: The screen shots used in this document are live examples from the ESI corporate site that is using **eTeams**. Each customer will have values for their enterprise that are tailored to their business needs.

Figure 6. eTeams Enterprise Provisioning Dashboard

The actions that this user can make appear in the commands on the left side of the window:

- Direct Routing Management
- PBX Management
- User Management.

In addition to these activities, the page also provides status values or indications of actions that the Enterprise Admin needs to take. The Enterprise Admin Action Items panel will contain the instructions that the admin user needs to take for service to work properly. A Status that requires an action typically results in a red button in the Actions Required column. In this panel, there are no actions needed.

Managing eTeams Users with "User Management"

The _User Management_ set of commands allow for direct set up and adjustment of Teams endpoints for users on the ESI eCloud PBX. The Main Menu provides the following three commands for the administrator to perform these tasks:

- Add User
- Manage Users
- Bulk Upload Users

ESI can help with provisioning and managing users. However, once ESI initially provisions licenses and the first set of users, the system is easy enough to use that the enterprise admin can manage their users on their own. For example, the admin can easily disable **eTeams** for users that no longer need Teams, and then they can either return that Teams license to Microsoft or they can allocate that license to a new user.

Adding a Single User with "Add User"

The administrative user selects _User Management > Add User_ to add an individual user at any time. This approach can be easier than bulk uploading a low number of users. The user can select the information via dropdowns as it is already synced across platforms.

Figure 7. Add New User in User Management

The fields needed to add a new user are:

- <u>PBX Location</u>: This value comes from the field's dropdown. Currently, "PBX HQ" is the value being used for ESI eCloud deployments. See "Managing PBX" if the PBX location is not correct.
- <u>Available Voice Routes</u>: This value also comes from the field's dropdown. Currently, the correct voice is "US East 1." If US East 1 is not present in the drop down, please contact ESI.

At this point, the Enterprise admin confirms that this user has a "t" device available in the eCloud system looking at the User Devices table (next figure.) If this device is not in the list, contact ESI provisioning to get assistance. This confirmation eliminates confusion in the following steps, as provisioning becomes a simple click of the correct values from dropdown menus.
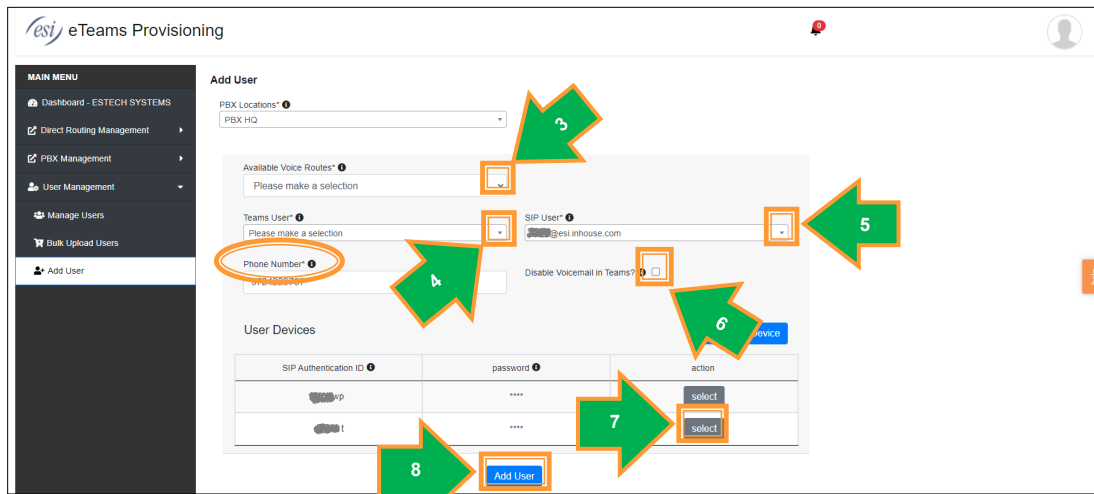
Figure 8: Device Table for Adding User

- Teams User (4): This drop down contains the users that are listed in Microsoft Teams Admin portal but are not yet configured/provisioned in **eTeams**. These Teams Users show up in the Manage Users section with at least 1 red icon. The Teams users hear should line up with a SIP user.
- SIP User (5): The dropdown contains all SIP Users on the ESI eCloud system that are not linked to a Teams User. The users provisioned here should line up with a Teams User
- Phone Number: By selecting the SIP User, the external phone number, a.k.a. the Direct Inbound Dialing (DID) number, that ESI eCloud assigned to this user serves as the default value for the Phone Number field. The user can override the default value by typing in a 10-digit number.
  1. eCloud uses this number as the originating number when the user dials an outbound, non-emergency call.
  2. **eTeams** uses this number in the display sections of the Teams application. Overwriting the auto-provisioned number can lead to confusion by the user, as the number displayed for outbound calls is not the number that an external contact will dial.)
- Disable Voicemail in Teams (6): This check box allows the administrator to allow or remove the use of the MS Phone system's voice mail platform for this user. ESI recommends checking this box so that MS-based voice mail is not used for Teams endpoints. If it is unchecked, the **eTeams** users will have to monitor two voice mail platforms.
  To avoid this extra effort, ESI deployed routing rules on the eCloud platform so that all calls, including calls from a Teams user to another Teams user, get managed on the ESI voice mail system. As such, this item should remain checked so that users do not need to use two voice mail systems.

  To avoid this duplicate effort, ESI deployed routing rules on the eCloud platform so that the ESI voice mail system manages voice mail for all calls, including inbound calls from another Teams user. There is minor configuration work for each **eTeams** user to perform when they initially log into their Teams client; these details are found in section *Configuring the Teams User to Use ESI's eCloud Advanced Services* later in this document.
- User Devices: The eCloud needs a device to support an **eTeams** user. Since the **eTeams** user is already provisioned in the ESI platform, so there may be several devices available for use by this SIP user. The device to use for **eTeams** is the extension of the SIP user followed by "t" as indicated by arrow 7. If a device does not exist with "t", contact ESI Technical Support for assistance.
- Add User: Press the "Add User" (8) button to complete the addition

Adding a Group of Users with "Bulk Upload Users"

The manager can use a CSV-formatted spreadsheet to add several new users at one time by first, populating the correct information for the users in the correct columns of the spreadsheet and then uploading the CSV file to the **eTeams** Connector. The admin presses *Bulk Upload Users* (1) to start this process.

Figure 9: Bulk Upload Users in User Management

The user can download a version of the file for bulk uploading by pressing *Sample File Format* (2) in the Bulk Upload Users page. The file looks like the image depicted in Figure 9. The bulk upload supports up to 50 users at a time.

The user can quickly download a default version of the file for bulk uploading by pressing "Sample File Format" (1) in the Bulk Upload Users page. The downloaded file looks like the following figure.

Figure 10. Sample File for Bulk Uploading Users

The admin should not adjust or manipulate anything in Row 1 but should delete the "@testuser" entries found in rows 2 and 3 in the sample file. The admin can also delete other entries for users who are already added. Then the admin adds the new user information starting in Row 2:

- <u>TeamsUserID</u>: This is the Microsoft userID found in the Microsoft admin portal
- <u>SIPUserID</u>: This is the ESI eCloud userID that is already available in the eCloud system
- <u>Phone Number</u>: This is the DID for the user; it does not replace the DID in the eCloud system, so it must align with the number already available (after porting, if necessary.)
- <u>Disable Voice Mail</u>: These values should be TRUE; it allows the ESI voice mail system to handle all voice mail activity, including messages from other Teams users.
- <u>SIP AuthenticationID</u>: This is the device for the user, typically, the user's extension.
- <u>Password</u>: A value is needed here for each user. The value must be at least 8 characters with upper-, lower-case, a number, and a special character.
- The remaining fields, including Portal Login Name and Portal Login Password, shall be left blank, as they are not used for provisioning an ESI **eTeams** user.

The file cannot have more than 50 users at a time. For specific instructions on saving the file in comma-separated values format, see *Create a CSV File* **below**.

Once the CSV file is ready for loading, the Teams administrator selects:

- <u>PBX Location</u> (1): This value comes from the field's dropdown. Currently, "PBX HQ" is the value displayed for ESI users; the Enterprise's PBX name will be different.
- <u>Available Voice Routes</u> (2): This value also comes from the field's dropdown. The listed voice routes – "US East 1" and "US West" are available for users based on their location in North America.
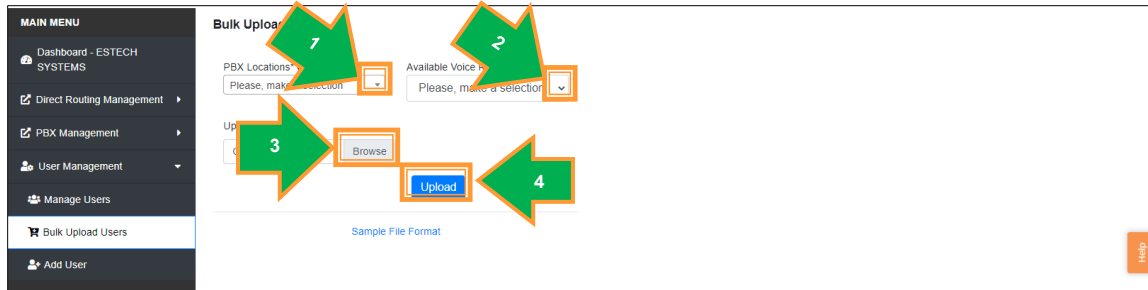

Figure 11. Bulk Upload User Steps in User Management

Next the user browses (3) their computer file system to find and selects the file with the users being added, and then clicks the Upload (4) button to start the import.

Create a CSV File

These steps apply to creating any CSV formatted file when using Microsoft Excel. CSV files are common when exchanging data in a fixed format between applications.

1. After editing the file, click *File* and *Save As* buttons.
2. Create a file name that you can remember and note the location of that file and enter it in the first box.
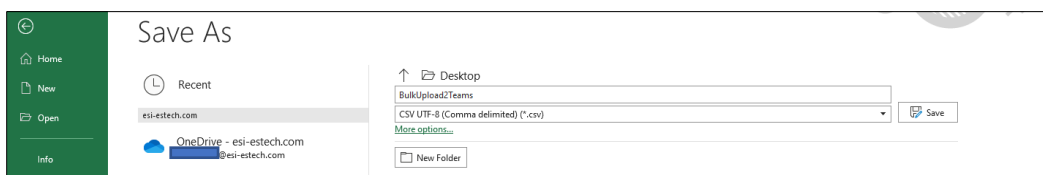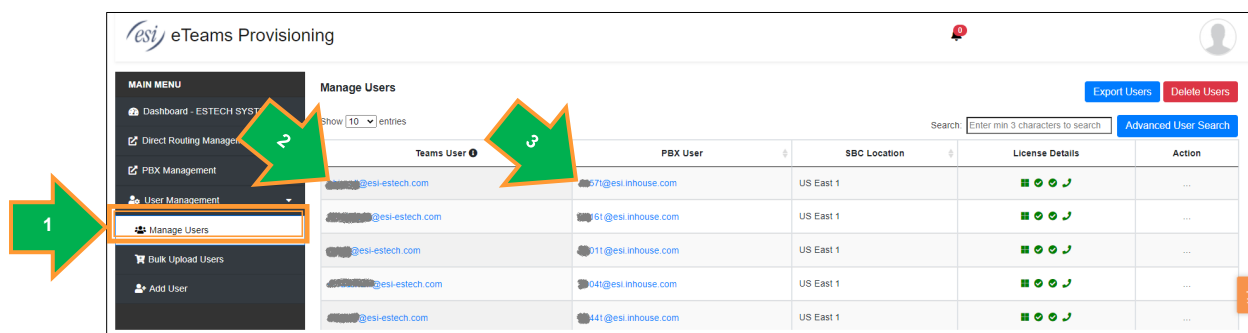3. Click on the file type drop down, select *CSV UTF-8*
4. Click *Save*

Figure 12: Command in Excel to create a Comma Separated Values file

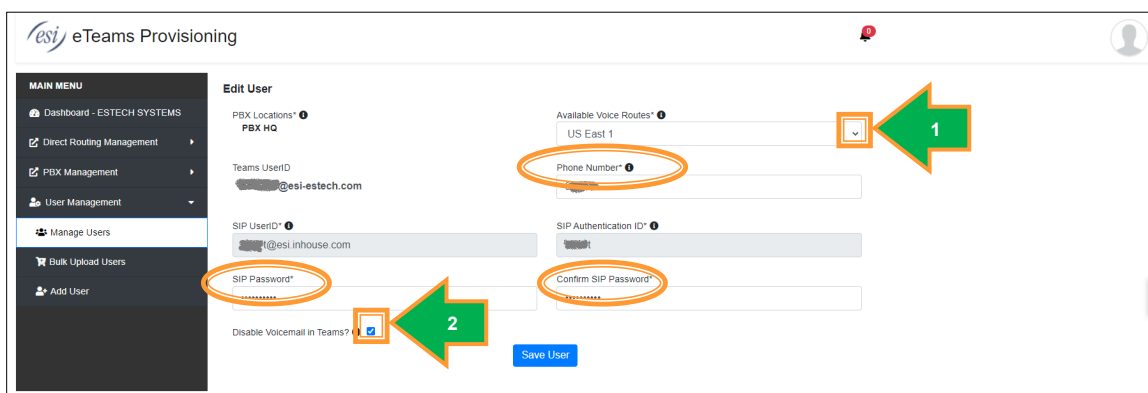## Changing Licenses and Other Capabilities with "Manage Users"

Selecting the *Manage Users* (1) command allows the admin to click any existing user and adjust their service. This page displays all users provisioned with Teams in the Teams Admin portal; these are the users with access to **eTeams** calling capabilities.

Figure 13. Manage Users Table

By clicking a particular user in either the "Teams User" column (1) or the "PBX User" column (2), the user sees the following information and can change a few fields:

Figure 14. Edit Teams User Information

- <u>PBX Locations</u>: PBX locations are created when a PBX service is added – it is not changeable.
- <u>Available Voice Routes</u>: holds the list of connections the enterprise can use for connecting the Microsoft users with the eCloud system. Valid values are US East 1 and US West, and these are the value that are commercially operational for ESI customers.
- <u>Teams UserID</u>: Aligns with the user's Microsoft account and care should be taken if changing the Teams UserID for this user.
- <u>Phone Number</u>: By selecting the SIP User, the external phone number, a.k.a. the Direct Inbound Dialing (DID) number, that ESI eCloud assigned to this user (or ported in from a prior service) serves as the default value (auto populated when selecting the SIP user) for the Phone Number field. The enterprise admin user can override that value by prefixing "9" to their extension and entering that value for the Phone Number.
  1. eCloud uses this number as the originating number when the user starts an outbound, non-emergency call.
  2. **eTeams** uses this number in the display sections of the Teams application. Overwriting the auto-provisioned number can lead to confusion by the user (the number displayed is not the number that an external contact will dial.)
  3. **eTeams** requires a unique number for every user, so the branded or common DID for the enterprise cannot be populated here. Speak to your ESI representative about how to present a branded phone number on outbound calls to the public network.

- **SIP UserID**: Identifies the user on the ESI eCloud system, and ESI manages this value – it is not changeable from this panel
- **SIP Authentication ID**: the SIP Authentication ID sets up the Teams endpoint device for authentication purposes on the ESI eCloud system. ESI manages this value. This value comes from the extension PBX user with an extra character.
  If a user has a tablet device that has an ESI soft client running on it, then the admin needs to provision this user with another letter, such as "m".
- **SIP Password**: ESI manages the SIP Password; once set, it typically does not need to be changed. This password confirms the user seeking access to the user ID on the ESI eCloud system. It is critical that the SIP password entered here align with the SIP Password on the ESI eCloud system.
- **Disable Voicemail in Teams**: Allows the administrator to allow or remove the use of the MS Phone system's voice mail platform for this user. ESI recommends checking this box so that MS-based voice mail is not used for Teams endpoints. If it is unchecked, the **eTeams** users will have to monitor 2 voice mail platforms.
  To avoid this duplicate effort, ESI deployed routing rules on the eCloud platform so that the ESI voice mail system manages voice mail for all calls, including inbound calls from another Teams user. There is minor configuration work for each **eTeams** user to perform when they initially log into their Teams client; these details are found in section *Configuring the Teams User to Use ESI's eCloud Advanced Services* later in this document.

The third column in Figure 13 is "SBC Location," and it is not changeable by the enterprise admin.

The next column in Figure 13 is "Licensing Details," and it contains a series of icons to depict if a user has the correct licenses. The icons used are:

- Hovering over this icon displays the type of Microsoft license allocated to this user.

- In the second position, this green checkmark shows that Microsoft assigned this user to the appropriate phone system license. The (white x in a red circle) in the second position denotes that Microsoft has not yet assigned a phone system to this user.

- In the third position, this green checkmark means that Microsoft provisioned this user to use the phone system allocated. The (white x in a red circle) in this position signifies that Microsoft has not yet provisioned access to a phone system for this user.

- In the fourth position, the green phone icon says that Microsoft and the enterprise successfully activated Teams calling for this user. The red headset with the line in the fourth position shows that Microsoft and the enterprise have yet to activate Teams calling for this user.

- The red D shows that the domestic calling plan is *incorrectly* provisioned. The Microsoft admin user needs to access the Microsoft Admin Portal, find this user, and adjust the license to remove the domestic calling plan from the user. The expected license there is "MCOEV" (Microsoft Teams Phone Standard.) This indicator should not be here for any user, which is why it is red.

Under the "Action" heading on the far right, the user presses the ellipses (1) to see a dropdown that lets them:

- Change the password for this provisioned Teams user (2)
- Delete this provisioned Teams user (3)
- Disable calling for this Teams user (4) for this Teams user. This action removes the connection between the eCloud and eConnector but leaves the user provisioned for service. Service returns

for the user when the enterprise user synchronizes the PBX users (as indicated in the Enterprise Admin Action Items panel on the Enterprise dashboard.)
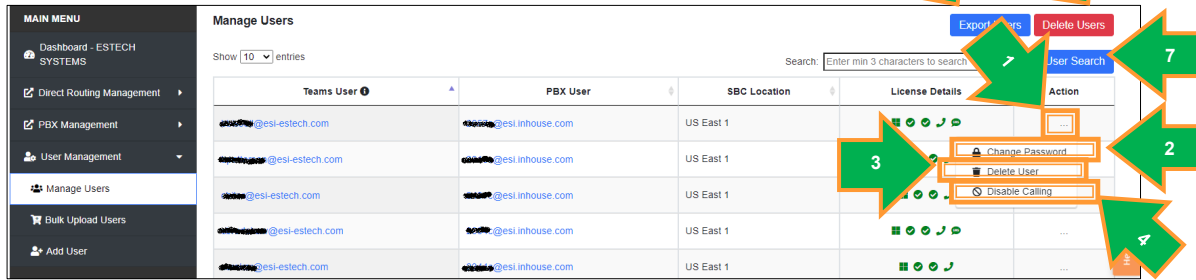

Figure 15. Buttons to Export and Delete Users in Manage Users

In addition to the columns in the table, *Manage Users* provides three buttons for use by the user:

- Export Users (5) – Pressing the Export Users button causes the **eTeams** system to send a CSV file with all of the active and provisioned Teams users to the Downloads folder of admin's computer.
- Delete Users (6) – Pressing this button adds a column to the left of the Teams User column, and by checking the box next to the user(s) identifies the user being deleted (which also turns each checked row gray), the admin can delete many users at one time. The admin must press *Confirm Delete Users* in the confirmation window to remove those users from service. This delete removes the user from the **eTeams** eConnector, which stops service. The deleted user(s) is(are) not removed from Microsoft 365 service, Microsoft Teams service or ESI eCloud service, which allows users to be added back if desired. Each portal must be accessed to remove the user to eliminate them from the system.
- Advanced User Search (7) – Pressing this button allows the user to search for deleted users or unlicensed users.

Managing the Calling Platforms for eTeams with "PBX Management"

The *PBX Management* section of the Enterprise Portal Main Menu provides access to the parameters for the eCloud PBX, and this section has two tasks that an enterprise can perform:

- Manage PBX Locations
- Add PBX Location

ESI will provide the "Add PBX Location" service, so the Enterprise user will not need to do anything with this task. However, a user might find managing the fields useful, which they can do with "Manage PBX Locations."

Manage PBX Locations

This section allows the business to view and change the some of the parameters for the eCloud PBX. As a business may have multiple systems across different locations, the customer admins on the Enterprise portal can view and change values associated with their PBX platforms by clicking *Manage PBX Locations* (1) and the ellipses in the Action column (2.)
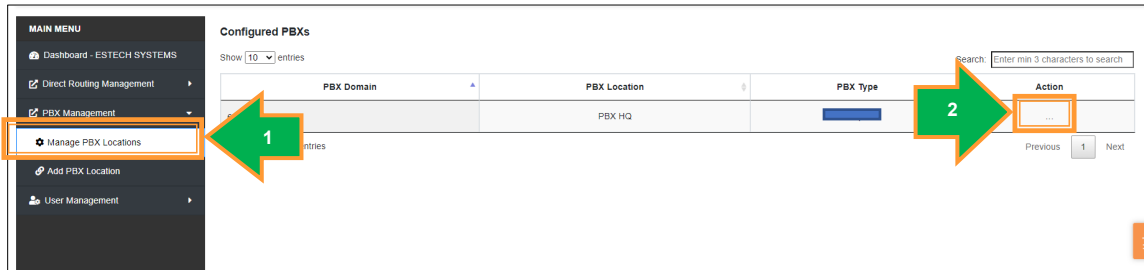
Figure 16: eTeams Manage PBX Locations and Action

Edit Information for a PBX Location

In the example here, clicking *Manage PBX Locations* brings up the list of configured PBXs for this customer. The enterprise user can perform the tasks associated with the drop down in the Action column:
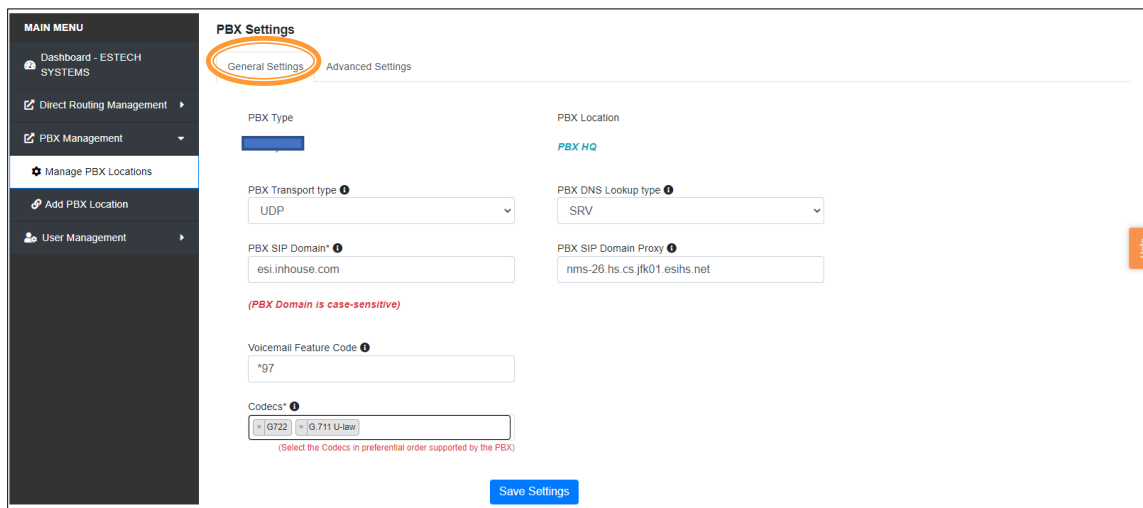
Figure 17: Selecting to Edit a PBX Location

By selecting *Edit,* the enterprise user has access to the PBX Settings that they can manage for that system. The parameters are in two tabs – General Settings and Advanced Settings.

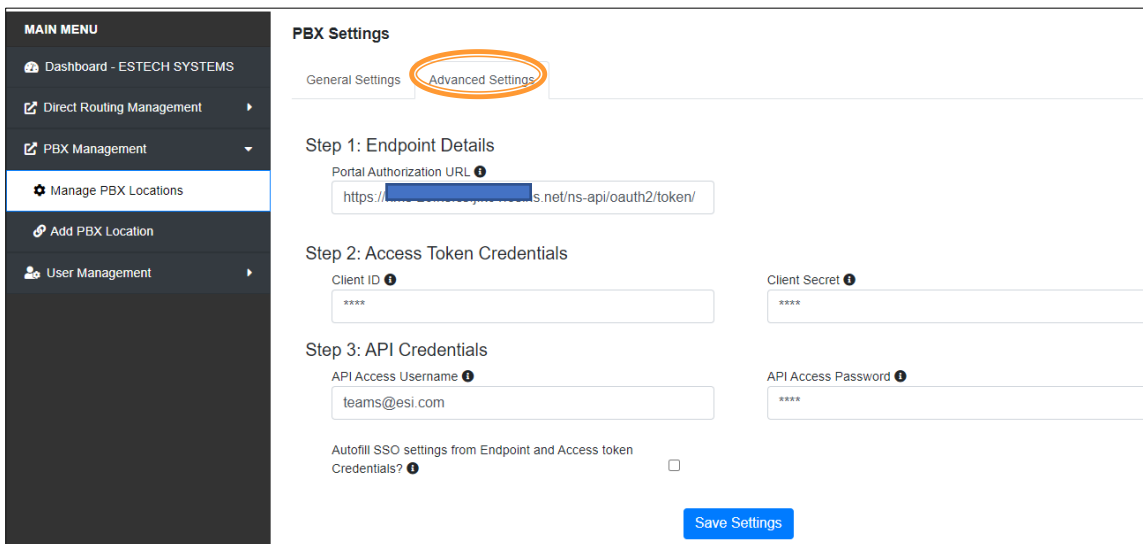# General Settings

This tab holds high-level parameters:

Figure 18: Edit General Settings at a PBX Location

The values on this screen are values that ESI uses for all eCloud systems. If there is a question about how something is working, please contact ESI Tech Support.

Similarly, "Advanced Settings" tab holds the following unique parameters ESI creates when provisioning a new enterprise. The enterprise will not need to change these values:

Figure 19: Edit Advanced Settings at a PBX Location

Managing Single Sign-on Settings

To adjust or confirm Single Sign-on settings, the admin user has access to these values by selecting *Action > Manage SSO Settings.* The user selects the Manage SSO Settings value in the drop down to adjust single sign-on parameters.
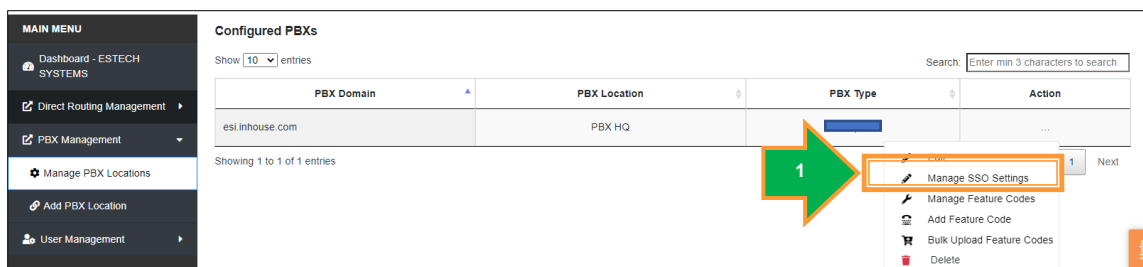

Figure 20: Manage SSO Settings at a PBX Location

These parameters apply to the Single Sign-on settings for the selected PBX Location identified at the top of the window.
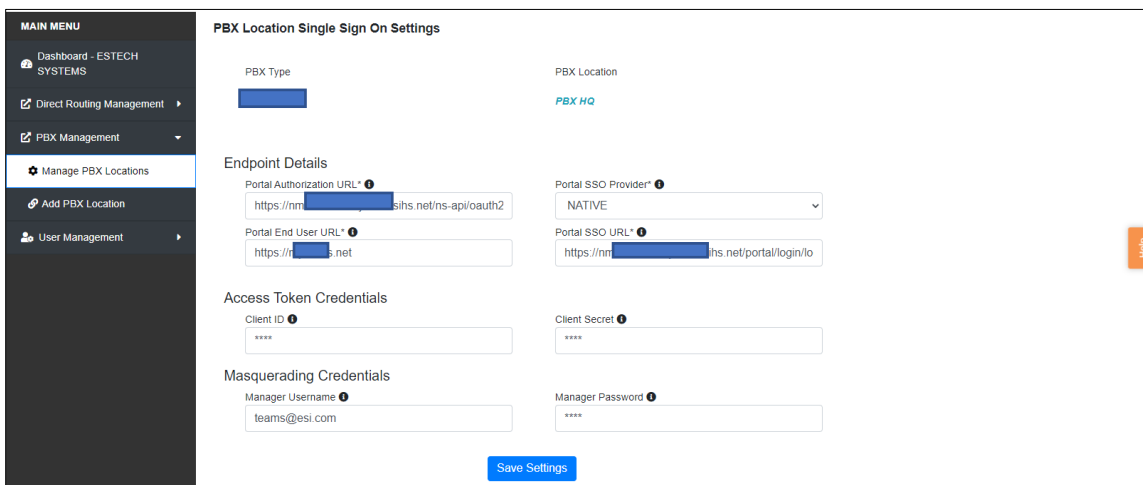

Figure 21: Single Sign-on Settings at a PBX Location

Endpoint Details: The settings here provide the locations for the system to authorize the users using SSO for accessing the eCloud PBX system. These values for these fields should not be changed by the Enterprise Admin. If there are questions, please contact ESI Technical Support.

Access Token Credentials: ESI uses an Access Token for confirming the administrator's access privileges, and these values should not be changed. If they need to be confirmed, please contact ESI Technical Support.:

Masquerading Credentials: – If the end user portal supports masquerading, this email address and password align with the username and password of the manager who can masquerade as the user. ESI sets these values to the same values as the API Access Username and password, respectively.

If these Single Sign-on settings need to apply to other PBX locations, contact ESI Technical support to request changes being loaded in the appropriate locations.

Managing the PBX Feature Codes Displayed on eTeams Soft Keys Panel

Since the Teams Phone application does not have programmable soft keys, **eTeams** provides the enterprise uses with an alternative way to activate soft keys using the **eTeams** application. ESI sets these codes up for the customer based on agreements of the feature code values, so if there are questions or concerns, please contact ESI before making any changes.

The Enterprise Admin user can navigate to and select the *Manage Feature Codes* value in the drop down to change or remove the feature codes and descriptions that Microsoft Teams presents on "eTeams Soft Keys" tab on the **eTeams** client application.
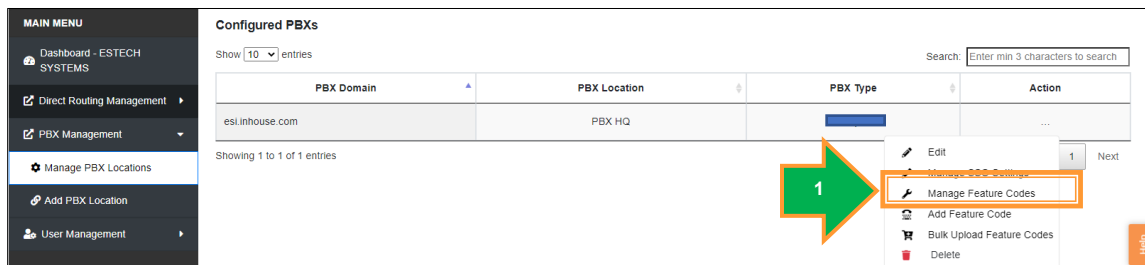

Figure 22: Manage Feature Codes for a PBX Location

It is critical that the feature codes align with the features established on the eCloud system. The information provided here does not affect the functions on the eCloud system but could be confusing or could cause user problems if the displayed codes and descriptions do not align with the implementation on ESI's eCloud PBX. If a caller invokes an incorrectly provisioned feature code, they could cause calls to no longer reach them. The enterprise may choose to include any or all feature codes for display on this page.

Selecting the ellipses in Action column (1) allows the administrator to delete or edit that specific feature code. Selecting *Edit* (2) provides a new screen that contains the parameters for the selected feature code. The user can adjust the values for that code, but if the feature code number is not correct, please contact ESI to confirm the next steps in deleting the code and adding it back with the correct number.
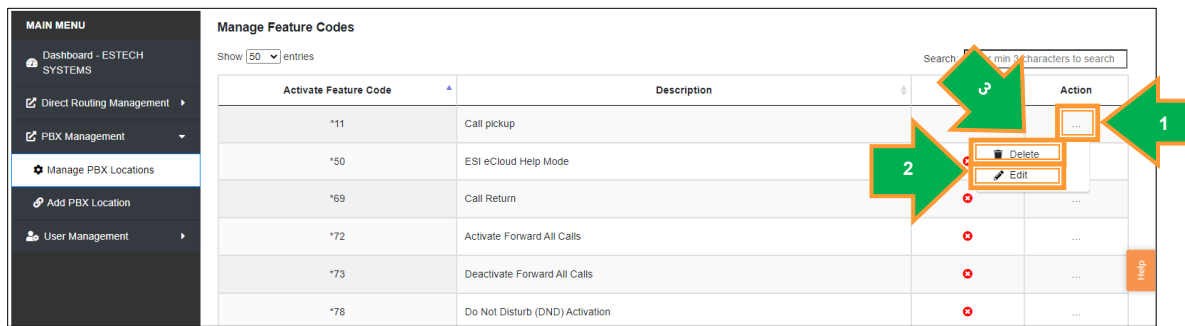

Figure 23: Edit a Feature Code

The editable fields are:

- <u>Feature Code Description</u>: This text field describes the feature.
- <u>Feature Code Input Type</u>: This field indicates if the feature code needs a number (like a parked call destination) or a phone number. "None" is the correct value when a number is not needed.
- <u>Use Feature code in Call Control</u>: Checking the box here means that a Call Control Options card will appear with a button during a call on the Teams phone screen.
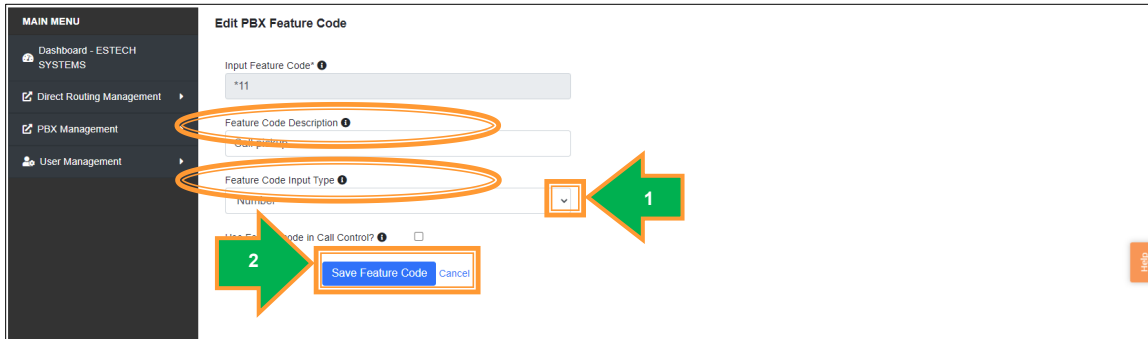

Figure 24: Edit PBX Feature Code

After entering the information, the user selects the *Save Feature Code* (2) button to replace the existing information for this feature code. Selecting *Cancel* (2) does not preserve the edits.

Selecting *Delete* in the drop-down (Figure 23, arrow 3) results in the appearance of a window as shows in Figure 25. This window prompts the user to confirm the deletion of that feature code from the **eTeams** Soft Keys panel. This action does not remove or adjust the feature code on the ESI eCloud PBX.
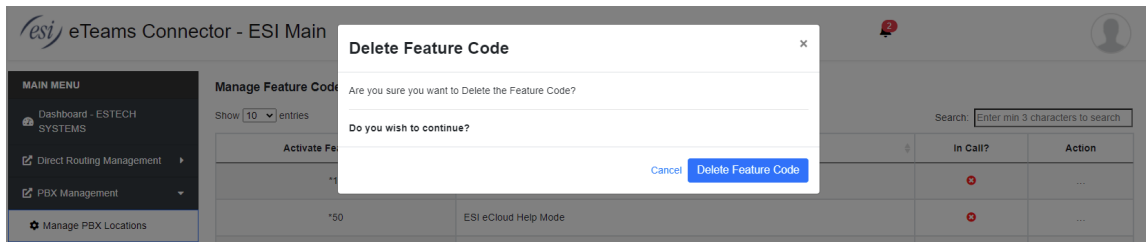

Figure 25: Deleting a PBX Feature Code

Adding an Individual PBX Feature Code for Display in the eTeams Soft Keys Panel

Like with managing the feature codes, the admin can also add a new feature code(s) that is not currently being displayed on the "eTeams Soft Keys" tab of the **eTeams** app on Teams client.
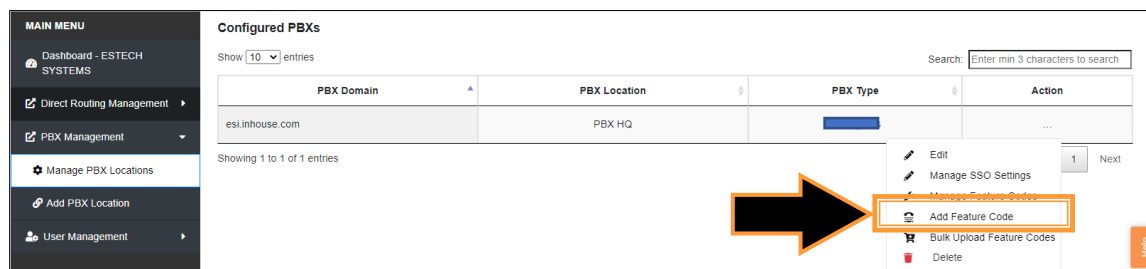

Figure 26: Add a New Feature Code at a PBX Location

By selecting *Add Feature Code*, a new screen appears to accept the values of the fields for the feature code that will be displayed:
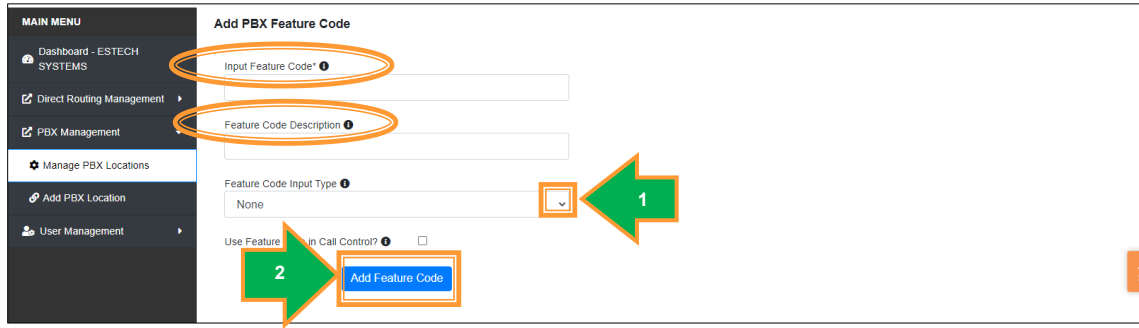

Figure 27: Add a PBX Feature Code

The user gets a blank template to fill out the following fields:

- <u>Input Feature Code</u>: This field contains the string of digits and buttons that comprise the desired feature code. For example, eCloud uses *78 to activate do not disturb and *79 to deactivate do not disturb. Each of these feature codes associated with pre-call activation may have an entry in this list
- <u>Feature Code Description</u>:   This text field describes the action that the feature code performs.
- <u>Feature Code Input Type</u> (1) The value of this field indicates if the feature code needs a number (like a parked call destination) or a phone number. If the feature does not need any input, None is the correct value.
- <u>Use Feature code in Call Control</u>: ESI eCloud does not support mid-call feature codes for Teams users, so do not select this box.

After completing the information, the admin selects the *Add Feature Code* button (2) to send this feature code to the system for display. If the user decides not to add the code, they can press any command in the Main Menu.

Adding a group of PBX Feature Codes for Display on the eTeams Soft Keys Panel

The enterprise admin user can use the bulk upload command to add a group of new feature codes for their display on the "eTeams Soft Keys" tab of the **eTeams** application.

By selecting *Bulk Upload Feature Code,* the system can "load" the desired feature codes from a spreadsheet saved in a CSV (comma separated values) file.
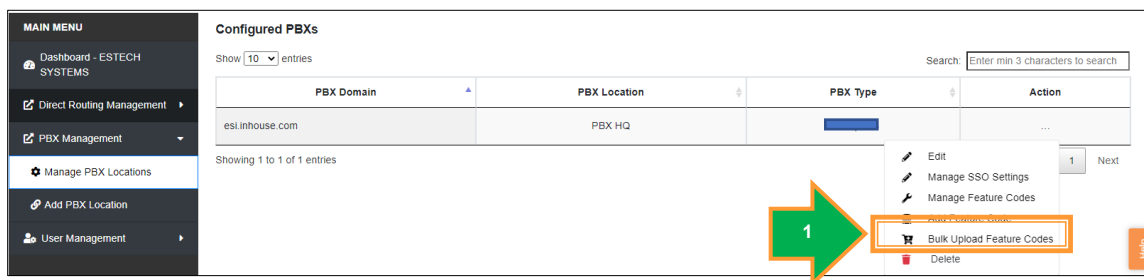

Figure 28: Upload a List of Feature Codes at a PBX Location

There are two steps to this task – creating the spreadsheet and uploading the spreadsheet.
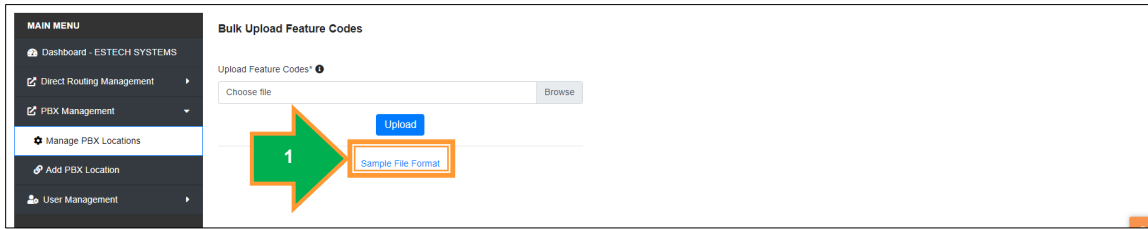

Figure 29: Upload a List of Feature Codes at a PBX Location

Upon selecting this option, the Enterprise admin user sees a new screen that contains a link to the *Sample File Format* (1). Clicking that link saves a file by the name of "bulk_fc.csv" in the computer's Downloads folder. An example looks like the image in Figure 29.
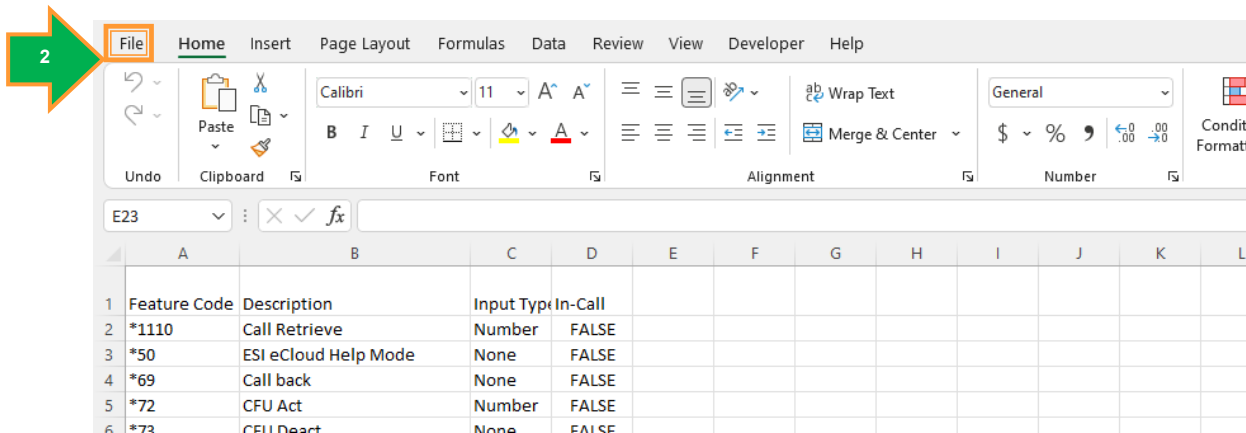

Figure 30: Excel Spreadsheet with Feature Codes for Bulk Upload

The enterprise admin can place up to 50 feature codes (starting in row 2) with the same information they would include if adding the feature code entries one at a time:

- Feature Code: This field contains the string of digits and buttons that comprise the desired feature code. For example, eCloud uses *78 to activate do not disturb and *79 to deactivate do not disturb. Each feature code has an entry in the list of feature codes.
- Description: This text field describes the action that the feature code performs.
- Input Type: The value of this field indicates if the feature code needs a number (like a parked call destination) or a phone number. If the feature does not need any input, None is the correct value.
- In-Call: ESI eCloud doesn't support mid-call feature codes for Teams users, so FALSE is correct.

After preparing the file with the appropriate information and saving it (see *Create a CSV File* for details on how to save the data,) the process resumes with Figure 31.
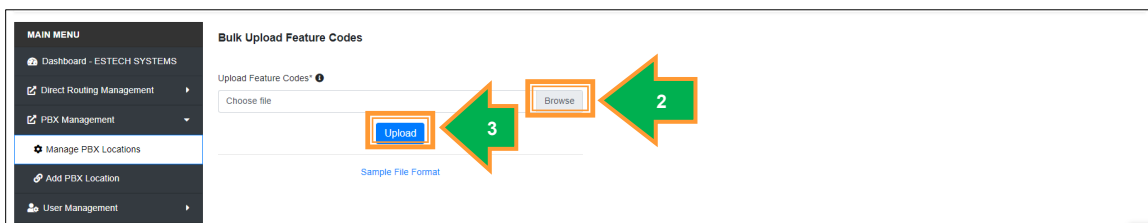

Figure 31: Submitting Bulk Upload of Feature Codes

The enterprise admin user enters the file name, along with the computer path to that file; pressing *Browse* (2) allows the user to find the location of the file and clicks "open" to select the file. This action makes the file ready for loading. To load, the user presses the *Upload* button (3.)

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Deleting a PBX Instance

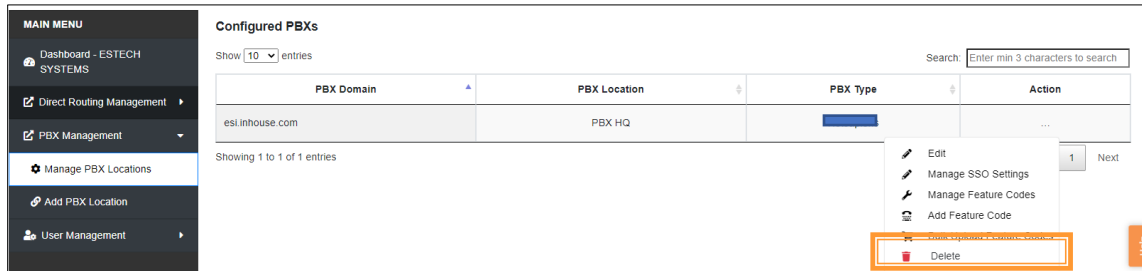ESI recommends that only an ESI employee delete a PBX instance.

Figure 32: Deleting a PBX Location

Adding a New PBX Location

This document does not describe the process to add a PBX location. ESI shall provide this service, as only ESI-authorized resources have the information to successfully add a new PBX location.

ESI shall work with our customers to determine the need for a new instance of a PBX in the **eTeams** application.

Please contact ESI if you believe you need to have a new PBX location added.

Configuring the Teams User to Use ESI's eCloud Advanced Services

The ESI **eTeams** solution requires some very simple updates by each **eTeams** user to their Teams settings. Each user needs to set up the following information when they are setting up their preferences in Teams.

Microsoft Teams Images in Figures 33 and 34 provide important context in the subsequent steps below:
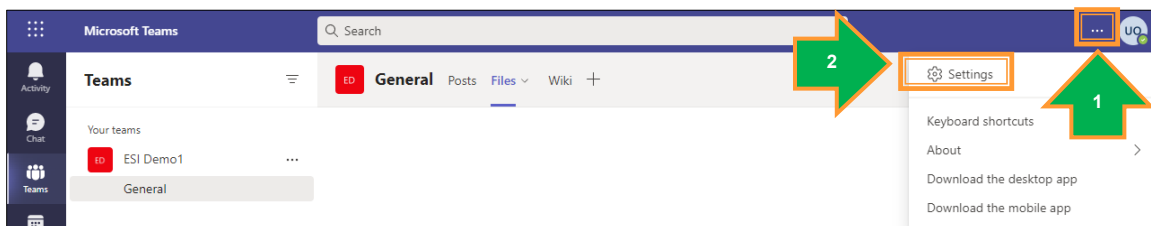
Figure 33: Microsoft Teams Settings

1. Click the ellipses in the upper right portion of the Teams command ribbon (1.)
2. Click the *Settings* gear (2) to access the fields represented in the image in Figure 34.
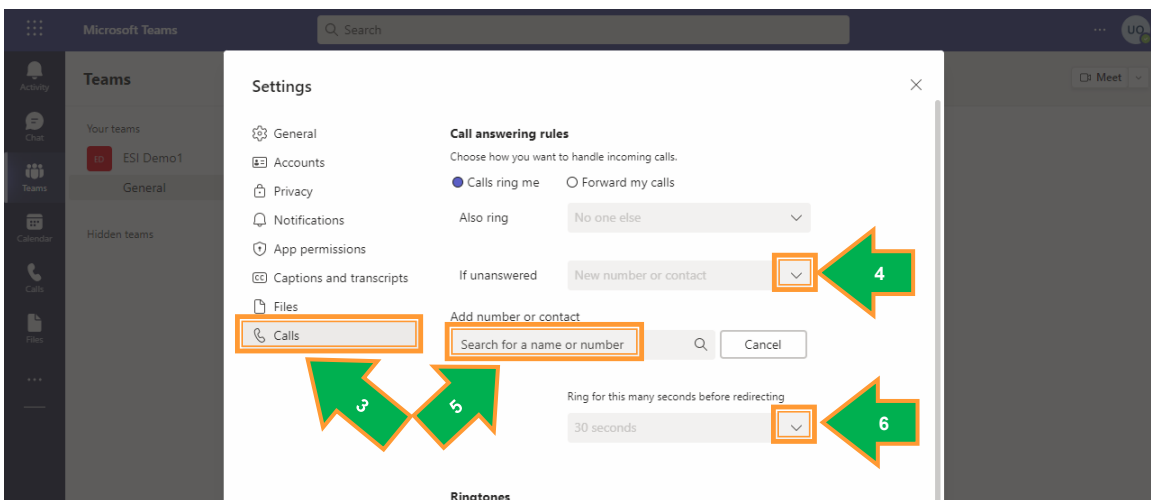
Figure 34: Teams Settings on the Teams App for Managing Voicemail

3. Click the *Calls* icon(3) on the left side of the Settings window
4. Click the dropdown next to "If Unanswered" (4) and select *New number or contact*
5. In the space "Search for a name or number (5,) enter *03* and the *user extension*. The system may indicate that it did not find a corresponding number – that is okay. Click the gray box that contains the digits entered. This number ensures that unanswered calls get sent from the Teams system to the eCloud for proper handling of the service.
6. In the dropdown below the "Ring this many seconds before redirecting" (6,) select a value that is larger than the timeout setting in the ESI system. If you do not know the value, ask your ESI Technical Support Team. Microsoft's default value for unanswered calls is 20 seconds; since the ESI system typically uses 25 or 30 seconds before treating a destination as unanswered, ESI recommends setting the ring time out value in Teams to 40 seconds. This value determines how long an unanswered call will ring on Teams before the Microsoft platform sends the unanswered call to the ESI system.

Calls originating from the ESI platform will stop alerting the Teams endpoint when the ESI eCloud redirects to a service like voicemail or the next attendant in the call queue as directed by the

eCloud system. A Teams to Teams call will alert for that user-selected duration prior to routing to the ESI platform for voicemail handling.
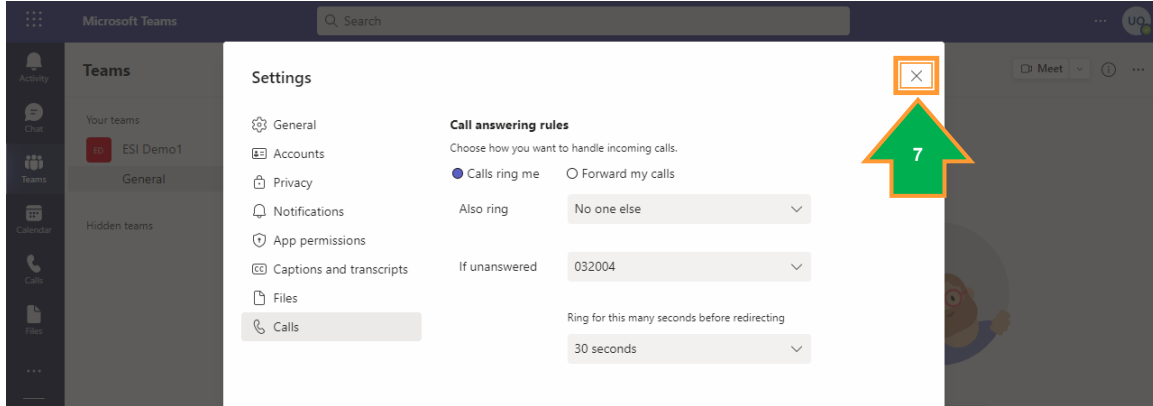

Figure 35: Sample View of Correct User Settings in Teams for Extension 2004

7. Close the window by clicking the "x" (arrow 7) in the upper right corner of the Settings screen.

Teams is now ready to use advanced services controlled by ESI's eCloud.

Confirming Direct Routing with "Direct Routing Management"

The *Direct Routing Management* function on the Enterprise Main Menu allows the admin to confirm that direct routing, which is the technique that connects Microsoft and the ESI eCloud PBX, is operating properly. The enterprise administrator cannot change information here but can look at this area to confirm that Direct Routing is set up and operating as expected and to see if there Microsoft licenses are available to add new users to the eTeams service.

Connecting the eCloud PBX with Microsoft Teams with "Direct Routing"

The first command is the Direct Routing tab. This page displays administrative information about the Microsoft licenses available for the business. The business or their CSP purchases these licenses from the Microsoft 365 Admin Portal, and after MS processes those orders, this page shows the Available Licenses, the SKU for the license purchased, and the number of user licenses available currently. The following table indicates the types of Microsoft 365 or Microsoft Business licenses along with the corresponding Microsoft "phone" system licenses needed to allow a user to have **eTeams** service.

Microsoft 365/Office 365 User License	Microsoft Phone Package License
Microsoft Business Basic	Microsoft Teams Phone Standard
Microsoft Business Standard	Microsoft Teams Phone Standard
Microsoft Business Premium	Microsoft Teams Phone Standard
Office 365 E1	Microsoft Teams Phone Standard
Office 365 E3	Microsoft Teams Phone Standard
Office 365 E5	The Office365 E5 license includes the phone system.
Microsoft 365 E3	Microsoft Teams Phone Standard
Microsoft 365 E5	The MS365 E5 license includes the phone system.

Table 1: Microsoft license needs for eTeams

The business customer can access their Microsoft 365 Admin Portal to confirm that their users have the correct licenses. The following diagram has an example of correct license pairs for each user. Note that each user has a Microsoft 365 Phone System license that pairs with their MS Office or MS 365 Business license.
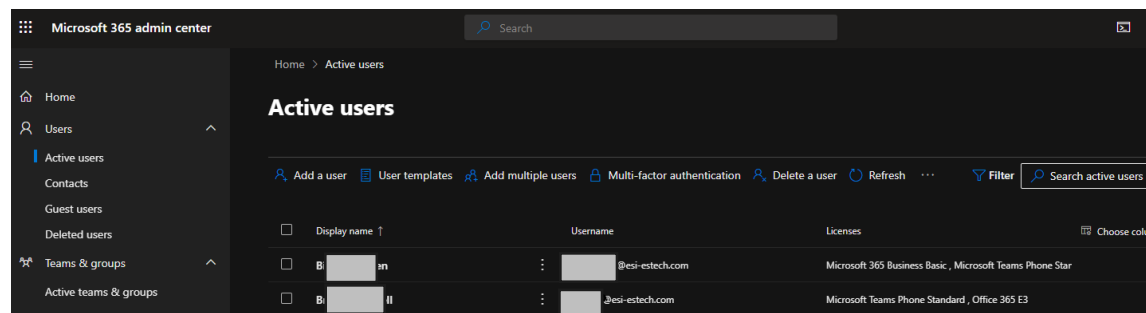

Figure 36: Viewing Licenses for Active Users on Microsoft 365 Admin Page

Businesses will need a phone package license for each Teams user who will be making or receiving phone calls with an **eTeams** seat based on the type of Microsoft 365 or Office 365 license.

Figure 37 is a screen capture of the Enterprise portal after selecting *Direct Routing Management* and *Direct Routing*. The *Available License* section depicts the number of <u>purchased</u> and <u>unassigned</u> licenses

that the enterprise can use to provision **eTeams** service. An availability of zero (0) means that the enterprise needs to purchase more of this type of license before it can be allocated for a user.

Note: While Teams Exploratory licenses are offered by Microsoft to allow a customer to try out Teams without using other Microsoft applications, this license has a short duration of availability. ESI does not recommend the Teams Exploratory licenses.

The enterprise will need to have at least one available AND unassigned User license of the Teams Phone system, or comparable add-on, to use when deploying the initial service. During the automated setup of Direct Routing, the MS processing creates a "DirectRouting User" for the Enterprise using an available Microsoft User license and Teams Phone Standard license. After the Direct Routing users are set up, the licenses can be removed from that user and allocated to Teams users.

On the right side of this page, the Configured Direct Routing Details displays the links established between the **eTeams** gateway and ESI eCloud and between the **eTeams** gateway and the MS cloud hosting Teams.

The values on this page support or represent the following attributes:

SBC Region identifies the general service location from where the **eTeams** gateway is supplying Session Border Controller (SBC) functionality. ESI provides information to Microsoft for creating this link.

SBC PSTN Gateway Domain gets created by Microsoft during the creation of the link in response to ESI's provisioning of the **eTeams** connector for this enterprise.

Team SIP Domain is the link between Microsoft cloud and **eTeams** gateway. Microsoft back-end processing creates the "onmicrosoft" components of the domain.

Figure 37: eTeams Enterprise Provisioning Portal Landing Page