ORIA

RELEASE 5.3

INSTALLATION AND ADMINISTRATION GUIDE

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Mitel®

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Oria Service Provider Installation and Administration Guide

Release 5.2
Document Version 5.2

WHAT'S NEW

MICOLLAB MITEAM DATA CENTER LOCATION

You can now set the location of the MiCollab MiTeam data center in the Service Provider Portal to support Data Sovereignty requirements. Oria 5.3 with MiCloud Business 3.3 supports three locations for hosting MiTeam user data; US (default), Europe, and China.

If you upgrade to Oria 5.3 but using MiCloud Business 3.2 or earlier, the MiTeam data center location is set to US by default and is read-only.

ORIA OVERVIEW

Oria is a customer management solution for service providers using Mitel® MiVoice and MiCollab products enabling the delivery of multi-customer hosted communications services. It allows a service provider to manage and deploy hosted services to their customers. At the same time, Oria allows a service provider to offer each of their customers an administration and self-service portal to make site specific adds, changes, deletes, and upgrades and downgrades of user services.

The goal of Oria is to cut down on administration operations and make it easier and more efficient for a service provider to offer and deploy services to their customers. Phone users that are created for a customer have access to a variety of phone features defined by their assigned feature set.

Service providers manage and deploy hosted services to their customers through the Mitel MiCloud Solution (MiCloud). MiCloud can be deployed in one of two models:

- Small Business (SB)
- Medium-Large Business (MLB)

The SB deployment model uses the MiVoice Business Multi Instance platform installed on Industry Standard Servers (ISS) running the Mitel Standard Linux (MSL) operating system. Virtual LANs are not supported in this deployment scenario. In Oria, this is referred to as MiCloud Business Multi-Instance.

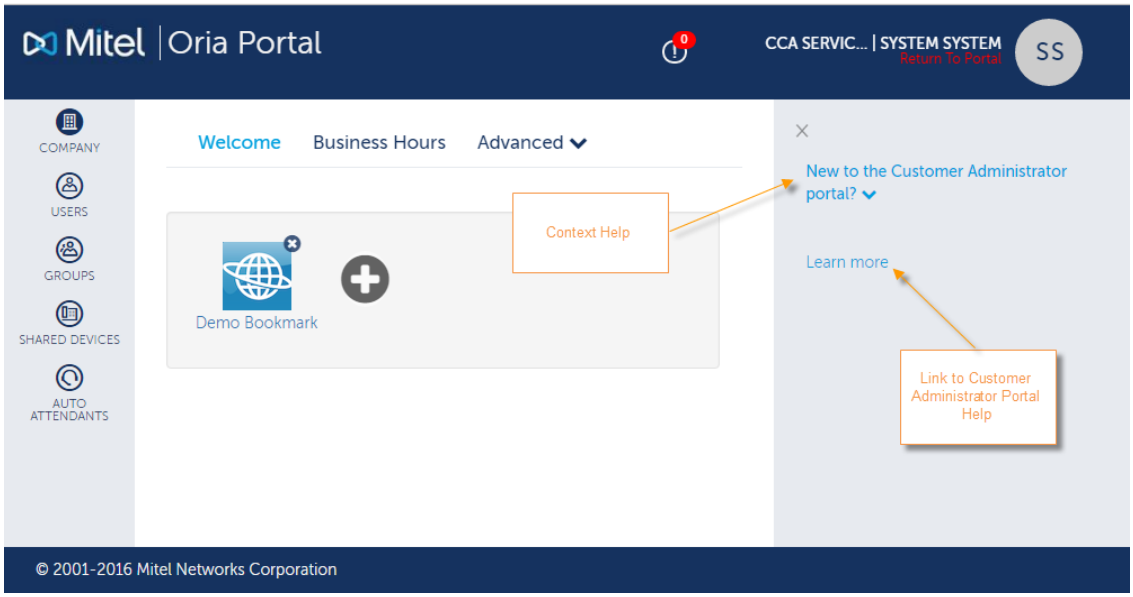
The MLB deployment model uses MiVoice Business virtual installed as an .ova file on a virtual machine running VMware vSpere. In Oria, this is referred to as MiCloud Business Virtual.

See the *Oria Engineering Guide* for details about the Oria platform.

CUSTOMER ADMINISTRATOR SELF-SERVICE PORTAL

The Customer Administrator Portal (CAP) is designed with critical tasks in mind that should be completed in sequence. For instance, the recommended workflow starts with defining a company's Business Hours to set up how incoming calls are received and handled at your company's main number(s).

Additionally, CAP always provides context-sensitive help wherever you may be in the task-flow. For example, the available help resources are shown below for the Business Hours task within the overall administrator workflow.


Mitel | Oria Portal
CCA SERVIC... | SYSTEM SYSTEM
Return To Portal
SS
COMPANY
USERS
GROUPS
SHARED DEVICES
AUTO ATTENDANTS
Welcome
Business Hours
Advanced
Demo Bookmark
Context Help
New to the Customer Administrator portal?
Learn more
Link to Customer Administrator Portal Help
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PLAN

Before system installation and setup, complete an analysis of the potential customer base that hosted voice will be sold to. During the analysis, the goal is to discover the following:

- Target customers and type of end users
- Common phone features used by target users
- Expected dial plans
- Local dialling codes for each city where customers may exist

Upon producing the results for the customer analysis, it is necessary to determine how the various features will be packaged into Feature Profiles and bundled with portal features to satisfy the majority of target users. Dialing privileges are also designed at this stage to include all potential customer locales and their various local dialing codes. This will reduce lost time later when a default database update is required to include a new Dial Privilege.

The following generic business requirements need to be set for all customers:

- Bundles/Feature Profiles
- Dialing Privileges
- Key Templates
- Brands

INSTALL

Install Oria as a software blade on Mitel Standard Linux (MSL), or as a virtual appliance running on a virtual machine.

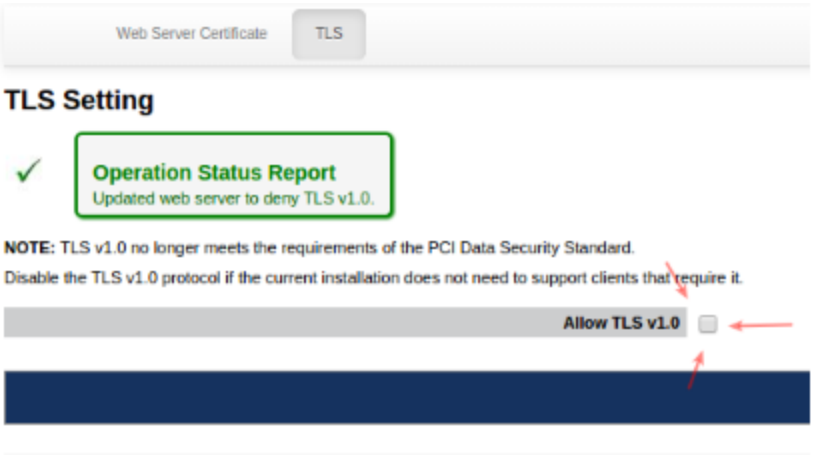
For information about the installation and setup of the voice platform (i.e. MiVoice Business Multi-Instance, MiVoice Business Virtual , MiVoice Business, MiVoice Border Gateway, etc.) or for proper network configuration, please refer to the appropriate Mitel product-specific documentation.

The procedures described here assume that all networking has been configured according to the Hosted Deployment model as described in the Oria Engineering Guidelines. To ensure that Oria operates properly, select an IP address that is available within the appropriate network or subnet to allow access to the appropriate voice platform.

Important: TLS 1.0 has been found to be vulnerable to a number of security attacks. As such, Oria 5.3 disables support for TLS 1.0 by default. Mitel does not recommend using TLS v1.0. However, should you need to enable support for TLS v1.0, login to the MSL server manager for the server at:

[http://<address]http://<address of Oria server>/server-manager,

go to **Security > Web Server > TLS** and select **Allow TLS v1.0**.



After Oria is installed, you must Configure the following parameters:

- Network Time Protocol (NTP)
- Keyboard/Time Zone/Locale (during the installation of MSL)
- HTTPS Web Certificate

INSTALL ON A PHYSICAL SERVER

The Oria software blade is installed from the blade panel in the MSL Server Manager. Installing and activating the Oria software blade consists of the following steps:

- Logging in to the MSL Server Manager.
- Loading the software onto the MSL Server from the Oria CD, and then accessing the blade panel in the MSL Server Manager to install the Oria software blade.

COLLECT SITE INFORMATION

The following table itemizes the information you will need on hand during installation and configuration. For efficient installation, it is recommended that you gather this information beforehand.

- Administrator Password
- Domain Name of MSL Server
- System Name of MSL Server
- Gateway IP Address
- IP Address of your external NIC
- System IP Address for the Oria blade

To install Oria on a physical server

1 Place the CD in the optical drive.

2 Login into the Server Manager using a supported browser with the user name 'admin' and the root password you gave when configuring the MSL server. The Server Manager is accessed by entering the following URL:**http://<www.hostname> OR <IP address of the MSL Server>/server-manager**.

3 Click on **Blades**, located in the left-side panel under the ServiceLink heading.

4 Click **Update List** to ensure an up-to-date listing of software blades.

5 Click the **Install** link, located beside the Oria blade name.It may take a few minutes for the software to install.

6 Test the installation:

7 Click on **Oria**, located in the left-side panel under the **Applications** heading.

8 If Oria is not visible, refresh the browser.

9 Click **Launch**, located in the main window.

INSTALL ON A VIRTUAL MACHINE

Oria is installed using the vSphere Client connected directly to the VMware ESX/ESXi 5.0, 5.1, 5.5, or 6.0 server or through the vCenter Server.

Installing and activating the Oria virtual software consists of the following steps:

- Logging in directly to the ESX/ESXi hosts or to the vCenter Server using the vSphere Client application.
- Deploying virtual Oria as a virtual machine and virtual application operating on VMware vSphere 5.0, 5.1, 5.5 or 6.0.
- Powering up the Virtual Machine and commissioning MSL/Oria.

COLLECT SITE REQUIREMENTS

The following table itemizes the information you will need on hand during installation and configuration. For efficient installation, it is recommended that you gather this information beforehand.

- **Administrator password** - For password strength, choose a password that contains a mix of upper and lower case letters, numbers, and punctuation characters, and that is not a dictionary word.
- **Domain Name of MSL Server** - The domain on which the MSL server is installed, i.e abc.com.
- **System Name of MSL Server** - Names must start with a letter; can contain letters, numbers, and hyphens. Also known as the host name.
- **MSL Server IP Address Subnet mask and Gateway IP address** - The MSL Server IP address This will also be the IP address for the Oria blade. An appropriate subnet mask for the MSL Server IP address. The IP address of the router.
- **vSphere Client application installed on a PC** - The vSphere Client is used to deploy Oria. The vSphere Client acts as a console to operate virtual machines and as an administration interface into the vCenter Server systems and ESX/ESXi hosts. Refer to the VMware website for detailed installation procedures and additional documentation.
- **(Optional) vCenter Server(s) installed on the network** - A service that acts as a central administrator for ESX/ESXi hosts connected on a network. This service directs action on the virtual machine and the hosts. The vCenter Server is the working core of vSphere. Refer to the VMware website for detailed installation procedures and additional documentation.
- **ESX/ESXi 5.0, 5.1, 5.5, or 6.0 installed on the server** - Use the latest software version as specified in the *Oria Engineering Guidelines*.

INSTALLING ORIA USING AN OVF TEMPLATE

This installation procedure assumes that a VMware server has been installed and is running an ESX or ESXi operating system.

To install Oria on a virtual machine

1 Install VMware vSphere client as follows:

2 Open a web browser and enter the IP address of the VMware server.

- Click **Download vSphere Client** to download the client.
- Run and complete installation wizard.

3 Retrieve the latest Oria OVF template (Oria.ova file) from Mitel Online (MOL).

4 Open the vSphere client to connect to the virtual machine:

- Enter IP address of VMware server.
- Login as the root user.

5 Click File → Deploy OVF Template. . . . The Deploy OVF Template screen displays.

6 Select one of the following:

- Deploy from file if the OVF template file was downloaded to the local computer or to a network share drive, then click Browse to locate the file.
- Deploy from URL if the OVF template file is on the internet or accessible through a web browser; enter the URL of the location of the file.

7 Click **Next**. The OVF Template Details screen displays. Leave the default selections as is.

8 Click **Next**. The end user license agreement screen displays.

9 Click Accept to accept the license agreement, then click Next. The Deploy OVF Template Name and Location screen displays.

10 Enter a meaningful name for the Oria virtual machine, or accept the default name. Click **Next**. The Deploy OVF Template Disk Format screen appears.

11 Click **Thick Provisioned Lazy Zeroed**. Click **Next**.

12 If the network defined in the OVF template doesn't match the name of the template on the host to which you are deploying virtual Oria, you are prompted to configure the network mapping. Contact your Data Center administrator for more details about which Network Mapping to use.

13 Click **Next**.

14 Review the information Select Power on After Deployment. Click **Finish**.

> **Note:** This process may take up to 10 minutes to complete depending on network traffic and the performance of the server.

15 When the dialog indicating that the deployment is complete appears, click **Close**. vOria appears in the inventory list in the left side navigation pane.

16 Click on the newly created Oria Virtual.

17 When the Oria Virtual has powered up, you can begin configuring the MSL server.

To configure the MSL server:

1 Open the virtual machine MSL Server Console in one of the following ways from within the vSphere Client:

a Right-click on the newly created Oria Virtual and select **Open Console**.

b Click the **Launch Virtual Machine Console** icon in the tool bar.

> **Note:** VMware Tools are pre-loaded as part of Oria Virtual.

c Click the **Console** tab in the main display window.

2 The MSL Server Console window appears. Place and click the cursor in the console window to continue. If at any time you want to have the cursor available for other desktop activities, press the **CTRL + ALT**.

3 Follow the MSL server configuration procedures as described in the MSL Installation and Administration Guide.

4 When the MSL server configuration is complete, it might be necessary to add a local network to MSL if you intend to access Oria Virtual from a different network from which it is installed.

a From the Server Console, select **9 - Manage Trusted Networks**.

b Click **Add** a new trusted network.

c In the **Network Address** field, enter the IPv4 or IPv6 address of the network to designate as “local”.

d In the **Subnet mask** field, enter the dot-decimal subnet mask (for example, 255.0.0.0 if you intend to open up to the entire Class A subnet).

e In the **Router** field, enter the IP address of the router you will use to access the newly-added network.

f Click **Add**.

5 When the MSL server configuration is complete, it might be necessary to add a local network to MSL if you intend to access Oria Virtual from a different network from which it is installed. The process consists of adding a local network, subnet, and router to the Local Networks panel in the server manager as follows:

6 Log in using the admin user ID and root password created during the MSL server configuration.

a Using the arrow keys, select **11 - Access Server Manager**.

b Log in using the same administrator user ID and password as in **Step a**.

c Using the arrow keys scroll down to Local Networks.

d Use the down arrow key to select Add Network. Press **ENTER**.

e Use the down arrow key to enter the following information:

- Subnet Mask (for example, 255.0.0.0 if you intend to open up to the entire Class A subnet).
- Router Address (for example, 192.168.1.x, the gateway IP provided during the MSL server configuration).

f Use the down arrow to select **Add**, then press **ENTER**. A status screen displays indicating success at creating the Local Networks.

g Type **Q** to quit, then select **Exit** and **Yes**.

h Using the down arrow key, scroll to **Exit** from the MSL Server Console.Press **ENTER**.

i You are now ready to configure the Oria application.

7 Confirm the OVF memory and HDD configuration as follows:

a Right-click the newly created Oria virtual machine.

b Click **Edit Settings**.

c Under the **Hardware** tab, click **Memory** and set Memory Size to 6 GB.

d Under the **Hardware** tab, click **Hard Disk** and set Disk Provisioning to 50 GB.

e Under the **Hardware** tab, click **CPUs** and set Number of Virtual Sockets to 4.

f Click **OK**.

8 Complete the OVF configurations as follows:

a Click **Power** → **Power On**.

b Click the **Console** tab and wait for server to startup. Login as root user (use password provided by Mitel).

c Select **Timezone Configuration** and set it based on your location. Click **OK**.

d Select **Keyboard Configuration** and set it based on your preference. Click **OK**.

e Select the **Network Configuration** option.

f Select **Edit Devices** → **eth0**.

g Uncheck the **Use DHCP** checkbox.

h Enter the appropriate Static IP, Netmask, and Default gateway IP address.

i Select **Edit DNS Configuration** and enter a Primary DNS server IP address.

j Click **OK** → **Save** → **Save&Quit** → **Quit**.

k Right-click the newly created Oria virtual machine.

9 Click **Power** → **Shutdown Guest**.

10 Right-click on the Oria virtual machine.

11 Click **Power** → **Reset**.

INSTALL ORIA PLATFORM MANAGER

To enable the Platform Manager features, install Oria File Server and Oria Platform Manager on a new server. Do not install them on the same server you installed Oria.

You can install the Oria File Server and Oria Platform Manager on the same server.

Install the following software blades:

- Oria File Server
- Oria Platform Manager

The Oria software blade is installed from the blade panel in the MSL Server Manager.

To install Oria File Server

1 Place the CD that contains the MSL Oria File Server software blade in the optical drive.

2 Login into MSL Server Manager.

3 In the left-side panel under **ServiceLink**, click **Blades**.

4 Click **Update List** to ensure an up-to-date listing of software blades. If there is a report displayed from the last install, click **Clear this Report**.

5 In the **Current List of Blades** table, find the **Oria File Server** blade and click the **Install** link in the **Installation** column.

6 Accept the license agreement. It may take a few minutes for the software to install.

7 Click **CTRL R** to refresh the page.

8 Wait a few minutes for the application to start up.

9 In the left-side panel under **Applications**, click **Oria File Server**.

To install Oria Platform Manager

1 Place the CD that contains the MSL software in the optical drive.

2 Login into MSL Server Manager.

3 In the left-side panel under **ServiceLink**, click **Blades**.

4 Click **Update List** to ensure an up-to-date listing of software blades. If there is a report displayed from the last install, click **Clear this Report**.

5 In the **Current List of Blades** table, find the **Oria Platform Manager** blade and click the **Install** link in the **Installation** column.

6 Accept the license agreement. It may take a few minutes for the software to install.

7 Click **CTRL R** to refresh the page.

8 Wait a few minutes for the application to start up.

9 In the left-side panel under **Applications**, click **Oria Platform Manager**.

CONFIGURE

You can now create a default MiVoice Business Platform database. Any operations performed in the portal will make direct changes to the tables within the MiVoice Business Platform database. For the portal to perform properly with each MiVoice Business Platform instance, configure the instances with the same default MiVoice Business Platform database.

Platform Manager can create platform instances from a blueprint. See Create a Platform Group using a Blueprint for more information.

CONFIGURE DEFAULT DATABASE

Before creating a customer and allowing a customer administrator to perform self-service operations, you need to setup a default MiVoice Business Platform database that can be applied to each MiVoice Business Platform instance.

The default MiVoice Business Platform database is based upon the information gathered during the system planning phase. It is a combination of configurations to satisfy system requirements for feature profiles (COS), bundles, dial plans, and default settings. The template is then applied to every MiVoice Business Platform instance to provide the same level of features and services to all customers.

> **Note:** The Platform Manager installation includes some reference golden database files. You can find them on the Platform manager server, under the linux directory */opt/dist_oria-bim-setup/reference*.

Prior to performing any configuration operations on the default MiVoice Business Platform database, it is necessary to ensure that all requirements have been satisfied and included in the default database. There are two parts of the default database that can be defined as follows:

- Fixed Defaults - Oria Default Configurations (these are fixed in Oria and cannot be changed)
- Flexible Defaults - Business Requirements Configurations

FIXED DEFAULTS

The fixed defaults refer to the settings that must be configured on the default MiVoice Business Platform database to ensure proper interaction between Oria and the MiVoice Business Platform.

When a user, hotdesk phone (IP device only), or call group is created using Oria, there are specific settings that Oria applies, and these must match those on the MiVoice Business Platform, to ensure it responds correctly (i.e. when a hunt group is created, Oria sets the Class of Service to COS 6).

The table below shows the default values that Oria uses, and these values must be identical to that configured on the default MiVoice Business database. Use this table to plan and configure the default database.

Important: There are several pre-configurations that must be performed on the MiVoice Business before it can be provisioned by Oria. It is important to read the Oria Engineering Guidelines first, before configuring MiVoice Business in Oria.

Notes:

Index #1 in the Call Rerouting Always Alternatives and the Call Rerouting First Alternatives forms must be blank (or will be overwritten by Oria).

Index #2 in the Call Rerouting Always and First Alternative #2 must be set to DN configured through the Oria Portal.

OPERATION	SETTING	VALUE	DESCRIPTION
COS Defaults	Hotdesk Phones	1/1/1	Day/Night1/Night2
	Standard Phones	Any	MiCW default is 11. Recommendation is to use COS 11 for the MiCollab environment
	Hunt Groups	6/6/6 (MiVoice) 25/25/25 (MiCollab)	Day/Night1/Night2 MiCW default value is 25.
	Ring Groups	6/6/6 (MiVoice) 26/26/26 (MiCollab)	Day/Night1/Night2 Will need to override the MiCW default value of 26.
	EHDU Extensions	11/11/11	Day/Night1/Night2 MiCW default value is 11.
COR Defaults	Hot Desk Phones	1/1/1	Day/Night1/Night2
DID Trunk Attributes	DID Digits to Absorb	Value that will generate a 7 digit number string.	Oria requires a 7 digit local number after the process of absorbing the DID digit string. For example, in North America, the digits to absorb will be 3 if the regional dialing plan is 10 digits and 0 if the regional dialing plan is 7 digits.

OPERATION	SETTING	VALUE	DESCRIPTION
Voicemail (EMEM) Configuration	Voicemail COS	*Any	Enable options: - COV/ONS/E&M Voicemail Port - Message Waiting - Voicemail Softkey *Use any available COS for voicemail (ports/hunt group)
	Vmail Ports	*Any	Assign Voicemail COS *Create as many vmail ports as necessary
	Vmail Hunt Group	*Any	Assign: - Voicemail COS - Vmail ports *This is a configurable value (in the Settings tab when creating a Platform Group), and once assigned to a customer it cannot change.
	Call Rerouting First Alternative	2	Set as 'THIS' for all options to forward to voicemail hunt group (6000).
	Call Rerouting Always	2	Set as 'THIS' for all options to forward to voicemail hunt group (6000).
Voicemail (NuPoint) Configuration	Voicemail COS	Any	Use any available COS for voicemail. The MiCW default value is 82.
	Voicemail MWI COS	Any	Use any available COS for

OPERATION	SETTING	VALUE	DESCRIPTION
			voicemail. The MiCW default value is 84.
	Voicemail Ports	Any	Assign Voicemail COS. Create as many voicemail ports as necessary. The MiCW default is to choose port numbers incrementally after the Voicemail Hunt Group number (eg. if the Voicemail Hunt Group number is 6000, the default is to start from 6001).
	Voicemail Hunt Group	6000 (MiCollab) 7000 (vUCC)	Assign: • Voicemail COS • Voicemail ports
	Call Rerouting First Alternative	2	Set as 'THIS' for all options to forward to voicemail hunt group (eg. 6000).
Speech Auto Attendant Configuration	Speech Auto Attendant COS	Any	Use any available COS for Speech Auto Attendant. The MiCW default value is 85.
Mitel Collaboration Advanced Configuration	Mitel Collaboration Advanced COS	Any	Use any available COS for MCA. The MiCW default value is 86.
Default CESID	Enable Automatic CESID	True	Allows user and hotdesk phone creation to occur

OPERATION	SETTING	VALUE	DESCRIPTION
			successfully
Registration Access Code Configuration	Set Registration Access Code	Enter a string from 3 to 10 characters long to use when registering a new IP telephone. The access code followed by the DN constitutes the PIN and can include the characters # and/or *.	Is required for creating a MiCollab Client Tenant in a platform group. If not set (blank), Oria displays the error message "MCD does not have the registration code set" when you try to save the platform group.

FLEXIBLE DEFAULTS

The flexible defaults refer to the settings that must be configured on the default MiVoice Business Platform database to ensure proper interaction between Oria and the MiVoice Business Platform instance corresponding to the bundle and dial plan assignments.

A bundle and dial plan are assigned to each newly created user. A bundle includes a Feature Profile, which is Oria's view of a Class of Service (COS). When a user is assigned a bundle, the COS number affiliated with the bundle gets assigned to the user on the MiVoice Business Platform.

Similarly, a dial plan in Oria corresponds to a Class of Restriction (COR) on the MiVoice Business Platform. When a user is assigned a dial plan, the COR that is registered to the dial plan gets assigned to the user on the MiVoice Business Platform.

To ensure that proper services (COS options and ARS routes) are available to an end user, it is essential to set the Flexible Defaults appropriately.

If any of the User features that affect the MiCollab Client are modified either through Oria or directly on the MiVoice Business System Administration Tool, then the changes will not be reflected on the MiCollab Client until it has been Synchronized with those MiVoice Business instances affected.

CREATE THE DEFAULT MIVOICE BUSINESS PLATFORM DATABASE

To create the MiVoice Business database for the first time, it is necessary to use the fixed and flexible defaults listed above, and any other additional customer requirements that may arise. Once this information has been collected, the default database can be created and then applied to each MiVoice Business Platform instance, using one of the following methods:

- MiVoice Business Import Spreadsheets
- Configure an initial MiVoice Business, then Backup and Restore on other MiVoice Business instances

To create the Default Database using MiVoice Business Import Spreadsheet:

1 Export the 3300ICPImportSpreadsheet.tar.gz using the Embedded System Manager (ESM) from a form that has the Export button.

2 Unzip the file to get the containing the 3300ICPImportSpreadsheet.tar file.

3 Unzip the 3300ICPImportSpreadsheet.tar to get the containing 3300ICPImportSpreadsheet.xls file.

Note: Ensure that the filename extension is ".xls". Filename extensions with ".xlxs" are not supported.

4 Open the spreadsheet, enable macros and create the following spreadsheets for the De- fault MiVoice Business database:

- Default CESID
- Class of Service Options
- VM Ports
- Station Attributes
- Hunt Groups
- Hunt Groups - Hunt Group Members
- Call Rerouting Always Alternative
- Call Rerouting
- Class of Restriction Groups
- Trunk configuration forms (eg. SIP Peer Profile, IP/XNET Trunk Profiles, and any additional forms that may be required)
- ARS Routes
- ARS Dialed Digits
- ARS Leading Digits
- ARS Digit Modification Plans
- Trunk Attributes
- Embedded UM Settings
- System Options

5 Enter all of the following required and appropriate information into spreadsheets:

- Required Oria defaults (voicemail, COS, COR, Default CESID, DID trunk).

> **Note:** Make sure your COS values are set up correctly. If you create a Ring Group with Voicemail and use it in a Call Flow, the call will route to Voicemail instead of the selected Overflow Point. This happens because the COS Call Forward No Answer Timer is set to 15 seconds while the default Overflow timer in the Ring Group is set to 20 seconds. The COS option will trigger before the Overflow Point thus routing the call to Voicemail.

- To enable Customer Administrators to create call flows that do not follow business hours, set the following COS values:

  a Third Party Call Forward Follow Me Accept =Yes

  b Third Party Call Forward Follow Me Allow =Yes

  c Use Held Party Device for Call Re-routing =Yes

- Business requirements (COS - Feature Profiles, ARS - Dial Plans)
- Go to the Shared Options form and set "DPNSS/QSIG Diversion Enabled" to Yes.

6 For each sheet completed in Step 4 above, check the Data Format and Save For Import.

7 Use the output spreadsheet file to configure each MiVoice Business instance with this default database.

8 Follow these guidelines:

- DID Configuration: Set the number of DID digits to absorb or insert for an incoming DID call (ensure that the DID trunk is set to absorb or insert all digits required to allow for ten digits to pass into the MiVoice Business instance).
- Hardware Defaults: If the hardware defaults to not fit deployment requirements, refer to System Maintenance.
- Call Rerouting: 6080 - 6099 will be used as pilot numbers in MiVoice Business.
- Rows 20 - 39 (inclusive) in Call Rerouting Always and Call Rerouting 1st Alt forms are reserved for Oria. Any changes to Call Rerouting in Oria will change the values in these rows of these two forms.
- Configuration Changes: Any changes to the default MiVoice Business database may require substantial reconfiguration of the Oria application to ensure that there are no discrepancies across the entire service offering.
- Do not attempt to perform multiple loading tasks at the same time as the Import. Those tasks being loaded at the same time as the Import will fail. It will be necessary to retry those loading tasks independently.

To create an Initial MiVoice Business, then Backup and Restore on other MiVoice Business instances:

1 Use the MiVoice Business Embedded System Manager (ESM) to configure the initial MiVoice Business instance.

2 Test to ensure that the configuration was performed successfully.

3 Backup the MiVoice Business database.

4 Use the saved database backup file to configure each MiVoice Business with this default database.

Since Oria allows for programming Embedded Unified Messaging in user mailboxes, and Forward to Email in user mailboxes, the system programming requirements for these should be part of the default MiVoice Business database programming requirements.

Embedded Unified Messaging needs to be enabled on a system-wide MiVoice Business basis in the Embedded UM Settings form. For Forward Voicemail to Email, the SMTP server needs to be configured in the System Options form on the MiVoice Business instance(s).

To set up Embedded Unified Messaging:

1 Go to the Embedded UM Settings form on the MiVoice Business instance(s).

2 Program the following fields:

- Enable Embedded UM: Yes
- IMAP Server: The IP address of your IMAP server
- IMAP Server Connection Type: Either CLEARN, SSL, or STARTTLS
- IMAP Server Port: The port used by your IMAP server (typically 143)
- IMAP Server SSL Port: The port used by your IMAP server (typically 993)

3 Go to the **System Options** form.

4 Program the following fields:

- Email Server:- The IP address of the SMTP server
- Email - Sender's Address: - Enter an email address

REGISTER MIVOICE BORDER GATEWAY

There are several pre-configurations that must be performed on the MiVoice Border Gateway (MBG) before it can be provisioned by Oria. It is important to read the Oria Engineering Guidelines first, before registering an MBG in Oria. If the network configuration includes a MiVoice Border Gateway (MBG) Cluster, it must be registered with the portal so that it can be assigned to a Platform Group. For proper registration, the MBG must exist and be reachable from Oria.

When registering an MBG, it must be based on what device types are allowed to be programmed on the particular MBG:

- MiNet MBG
- SIP MBG
- MiCollab Client

Each Site will be able to select an MBG for each device type and will allow 1 MiNet, 1 SIP, and 1 MiCollab Client device type, while each Platform Group can have multiple Sites with different combinations of MiNet, SIP, and MiCollab Client device MBGs.

PC MiNet Softphone phone types are programmed on the MiCollab Client device MBG; however, Oria will not allow a cluster zone to be specified.

DIDs can be assigned against one (or none) of a number of multiple MBG Clusters. For each DID range, an MBG Cluster and SIP Trunk can be selected.

DID Services can be assigned to a MiVoice Business platform or a MiVoice Border Gateway. DIDs are required in both the MBG SIP Trunks and MiVoice Business. The MBG needs DIDs to determine which MiVoice Business gets the call and the MiVoice Business needs them for DID Services.

EMBEDDED MIVOICE BORDER GATEWAY

Certain Platform Groups have an MBG embedded within that platform. The following platform types contain an Embedded MBG:

- MiCollab
- MiCollab with Voice

The Embedded MBG is categorized as follows, based on the type of device that can be programmed on it:

- MiNet Devices
- SIP Devices
- SIP Trunking (Routing Rules)

When creating a Site or registering a DID range for a MiCollab or MiCollab with Voice platform group, the Embedded MBG is included in the list of MBG Clusters, if it was registered. An Embedded MBG will only appear in the platform list to which it belongs.

When a user is created and assigned to a Site with an Embedded MBG, then the device will be programmed on the Embedded MBG if the Embedded MBG is assigned to the device type that was assigned to the user.

When a Hot Desk device is created and assigned to a Site with an Embedded MBG as the MiNet Device MBG, then the device will be programmed on the Embedded MBG.

When DIDs are registered for a MiCollab or MiCollab with Voice Platform Group, if the Embedded MBG is specified as the MBG, then the routing rules for those DIDs are programmed on the Embedded MBG. If another MBG cluster is specified, then the routing rules for those DIDs are programmed on that MBG.

If a MiCollab or MiCollab with Voice Platform type is not in use, you can delete it (it will also delete the Embedded MBG).

Notes: It is possible to register the same MBG twice by mistake, once with the IP address, and once with a Fully Qualified Domain Name (FQDN). Oria does not detect that the IP addresses are the same MBG. This will not cause any issues in Oria (other than it being treated as two separate MBGs) but may confuse the administrator. It is recommended that MBGs be registered in a consistent manner.

Ensure that Web Services have been enabled on the configured standalone MBG. Otherwise communication between the MBG and Oria will fail.

To register a MBG Cluster and assign it to a Platform Group

Registering an MBG cluster configures the DNS Server record on the DNS server to provide the MBG FQDN to the MBG cluster member hostname mapping.

1 From the **Platforms** tab, click the **MiVoice Border Gateways** tab.

2 Click **Register MiVoice Border Gateway Cluster**.

> **Note:** If you register an MBG Cluster after adding users, the changes that you make to the Public Facing FQDNs are not updated in the MiCollab Client User Settings. To update the settings and send users the updated MBG information (SIP username, SIP password, and external FQDN), resend the Welcome email.

3 Enter details and then click **Submit**.

> It is important to enter the MSL Username and Password in the appropriated fields when registering the MBG. Otherwise, the registration will fail.
> You will need to re-enter the MSL Username and Password credentials when doing edit operations (such as when editing a Platform Group).

CONFIGURE SERVER FOR WELCOME EMAIL

You must configure SMTP on the MSL server to send Welcome messages from Oria.

1 In the MLS server manager under Configuration, click E-mail Settings.

2 Configure the SMTP server as follows:

- Server to use for outbound SMTP: Enter the server hostname or IP address in this field.
- Destination Port for Outbound SMTP: Select a port for the SMTP. Available ports: SMTP Port 25 (use cleartext; default) SMTP port 587 (TLS encryption) and SMTP Port 465 (SSL encryption)

SET UP PORTAL

Before creating customers, a service provider must perform a set of tasks to set up the portal for service. The setup ensures proper service to all customers so that it will communicate with all pre-configured Platforms properly when an operation is performed (e.g. a user or call group is created). Prior to creating a customer, each pre-configured Platform must be registered using the Oria portal. Also, all bundles and dial plans must be registered and created using Oria to ensure that customers receive the desired services.

Administrator bundles are assigned to customers that contain the Users feature, at a minimum, and no Phone Features. The customer will then be able to perform user moves, adds, changes, and deletes without contacting the service provider. Here are the steps required to set up the portal:

LOG IN

Log into the Oria portal with the default Username and Password:

- Username: **system**
- Password: **password**

PLAN BUNDLES FOR CUSTOMERS

To plan and determine the necessary bundle and feature requirements:

- Identify user types within potential customers and determine requirements for each user type.
- Design bundles with feature/phone type combinations that will satisfy requirements of user types you identified in Step 1.

Refer to the following tables for information on bundle features and phone types.

CONSIDERATIONS

- User Bundle phone features are dependent upon the service type and license type selected for the type of user.

- Up to three phone types per bundle can be configured, depending upon the service type and license type selected for the type of user for the bundle.

Note: When you downgrade a user bundle from Oria, for example a user going from 3 phones down to 2, the MiCollab Client API will cause the user's status to be deleted and recreated. The user will need to log out of MiCollab Client, log in again and manually recreate their routing rules (set which devices will ring in different states).

- Phone types and feature profiles are also dependent upon the service type and license type selected for the type of user (see Table 2, “Phone Types by Service Type,”)
- When selecting UCC user bundles, and creating MiCollab Client Service users through Oria, Oria will strip out any domain names from the username field before saving it to MiCollab. However, the user will receive a welcome email from MiCollab Client Service with the login ID to be <username>.<Enterprise domain name>. It will be necessary to inform MiCollab Client Service users that they need only to log in with their user ID, not including the domain name.
- When MiCollab Client Service users have been created, and after being put in service there is a subsequent change to a user or a service, that user will receive a logout request on their MiCollab Client application.
- When a MiCollab Client user changes their credentials in their MiCollab Client, and subsequently those credentials are changed within Oria, Oria will overwrite the credentialson the MiCollab Client for that user.
- If a MiCloud Business Multi-Instance user has been created (a SB Entry UCC Bundle) with Twinning, and the user's firstname, lastname, as well as their email address is edited via Oria, then their IMAP Account Login in the Voicemail tab must be changed manually in the Edit User form in the Oria customer admin portal if the Embedded UM Enabled option is selected.
- PC MiNet Softphone phone types are programmed on the MiCollab Client MBG.
- When users with MiCloud Business Virtual bundles are created, languages are set by default based on the MiCollab default language for applications such as MiCollab Client.
- When users with MiClould Business Mutli-Instance bundles are created, Oria can set the language for applications such as MiCollab Client because the MiCollab server is not involved in configuring those applications.
- Modifying a user with a bundle containing the Hot Desk or ACD feature to one with a non-Hot Desk or non-ACD feature is not permitted. Modifying a user with a bundle containing a non-Hot Desk or non-ACD feature to one with a Hot Desk or ACD feature is not permitted. Only changes between non-Hot Desk or non-ACD bundles, as well as bundles that contain the Hot Desk or ACD features are permitted.
- Users assigned bundles with Mobile Softphone, PC Softphone, Generic SIP, Hotdesk, or ACD Phone Types will not have their Call History display within their Oria Portal page.
- Provide access to site administration features on the portal.
- Determine the Class Of Service (COS) numbers that will be used for each Feature Profile (determine Day/Night1/Night2 service).

- Record the Feature Profiles with COS numbers and feature combinations for each Feature Profile.

> **Note:** Part of designing a bundle is to design a Feature Profile that will define the phone set features that a bundle will provide to the assigned user.
> A Feature Profile is essentially registered as a Class of Service (including Day/Night1/Night2 time of day settings).

Table 1: Supported Phone Sets

PHONE TYPE	MODELS
IP	5220, 5304, 5312, 5320, 5320e, 5324, 5330, 5330e, 5340, 5340e, 5360, 5215, 5235, 6920, 6930, 6940
SIP	5603, 5604, 5607, 5610, 5624
Dual Mode	5212, 5220, 5224
DECT	112,
Open Phone	26 27
SIP-DECT	612, 622, 632, 650

Table 2: User Bundle Features by Service and License Type

SERVICE TYPE	MICLOUD BUSINESS VIRTUAL USER BUNDLES (MLB)						MICLOUD BUSINESS MULTI-INSTANCE			
FEATURE	BASIC IPT	STANDARD IPT	ENTRY UCC	STANDARD UCC	PREMIUM UCC	CONTACT CENTER AGENT	BASIC IPT	STANDARD IPT	ENTRY UCC	CONTACT CENTER AGENT
Prime Phone	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
Second Phone	N	N	Y	Y	Y	N	N	N	Y	N
Third Phone	N	N	Y	Y	Y	N	N	N	Y	N
Fourth Phone	N	N	Y	Y	Y	N	N	N	Y	N
OPTIONAL FEATURES										
Voicemail	N	Y	Y	Y	Y	Y	N	Y	Y	Y
Voicemail to Email	N	N	N	N	N	N	N	Y	Y	Y
Nupoint Class of Service	N	Y	Y	Y	Y	N	N	N	N	N
Message Waiting	N	Y	Y	Y	Y	N	N	N	N	N
Unified Messaging	N	N	N	N	N	N	N	N	N	N
Standard Unified Messaging	N	N	Y	Y	Y	N	N	N	N	N
Advanced Unified Messaging	N	N	Y	Y	Y	N	N	N	N	N

AWV Conferencing	N	N	N	N	Y	N	N	N	N	N
MiCollab Client Service	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
Lync Plugin	N	N	Y	Y	Y	N	N	N	Y	N
MiTeam	N	N	N	N	Y	N	N	N	Y	N
Next Gen Mobile SIP Phone Settings	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
Enable Secure Transport	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
Compression	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y

Table 3: Phone Types by Service Type - Basic IPT License

SERVICE TYPE	MICLOUD BUSINESS VIRTUAL USER BUNDLE (MLB)				MICLOUD BUSINESS MULTI-INSTANCE			
PHONE TYPE	PRIME	SECOND	THIRD	FOURTH	PRIME	SECOND	THIRD	FOURTH
Deskphone	Y	NA	NA	NA	Y	NA	NA	NA
External Phone	N	NA	NA	NA	N	NA	NA	NA
PC MiNet Softphone	Y	NA	NA	NA	Y	NA	NA	NA
PC SIP Softphone	Y	NA	NA	NA	Y	NA	NA	NA
Mobile SIP Softphone	Y	NA	NA	NA	Y	NA	NA	NA
Next Gen Mobile SIP Softphone	Y	NA	NA	NA	Y	NA	NA	NA
Hotdesk	Y	NA	NA	NA	Y	NA	NA	NA
ACD	Y	NA	NA	NA	Y	NA	NA	NA
ACD With Softphone Phone	Y	NA	NA	NA	Y	NA	NA	NA
Generic SIP	Y	NA	NA	NA	Y	NA	NA	NA
MiVoice Conference Phone	Y	NA	NA	NA	Y	N	N	N

Table 4: Phone Types by Service Type - Standard IPT License

SERVICE TYPE	MICLOUD BUSINESS VIRTUAL USER BUNDLE (MLB)				MICLOUD BUSINESS MULTI-INSTANCE			
PHONE TYPE	PRIME	SECOND	THIRD	FOURTH	PRIME	SECOND	THIRD	FOURTH
Deskphone	Y	NA	NA	NA	Y	NA	NA	NA
External Phone	N	NA	NA	NA	N	NA	NA	NA
PC MiNet Softphone	Y	NA	NA	NA	Y	NA	NA	NA
PC SIP Softphone	Y	NA	NA	NA	Y	NA	NA	NA
Mobile SIP Softphone	Y	NA	NA	NA	Y	NA	NA	NA

Next Gen Mobile SIP Softphone	Y	NA	NA	NA	Y	NA	NA	NA
Hotdesk	Y	NA	NA	NA	Y	NA	NA	NA
ACD	Y	NA	NA	NA	Y	NA	NA	NA
ACD With Softphone	Y	NA	NA	NA	Y	NA	NA	NA
Generic SIP	Y	NA	NA	NA	Y	NA	NA	NA
MiVoice Conference Phone	Y	N	N	N	Y	NA	NA	NA

Table 5: Phone Types by Service Type - Entry UCC License

SERVICE TYPE	MICLOUD BUSINESS VIRTUAL USER BUNDLE (MLB)				MICLOUD BUSINESS MULTI-INSTANCE			
PHONE TYPE	PRIME	SECOND	THIRD	FOURTH	PRIME	SECOND	THIRD	FOURTH
Deskphone	Y	N	N	N	Y	N	N	N
External Phone	N	Y	N	N	N	Y	N	N
PC MiNet Softphone	Y	N	Y	Y	Y	Y	Y	Y
PC SIP Softphone	Y	N	Y	Y	Y	Y	Y	Y
Mobile SIP Softphone	Y	N	Y	Y	Y	Y	Y	Y
Next Gen Mobile SIP Softphone	Y	N	Y	Y	Y	Y	Y	Y
Hotdesk	Y	N	N	N	Y	N	N	N
ACD	N	N	N	N	N	N	N	N
ACD With Softphone	N	N	N	N	N	N	N	N
Generic SIP	Y	N	Y	Y	Y	Y	Y	Y
MiVoice Conference Phone	Y	N	Y	Y	Y	Y	Y	Y

Table 6: Phone Types by Service Type - Standard UCC License

SERVICE TYPE	MICLOUD BUSINESS VIRTUAL USER BUNDLE (MLB)				MICLOUD BUSINESS MULTI-INSTANCE			
PHONE TYPE	PRIME	SECOND	THIRD	FOURTH	PRIME	SECOND	THIRD	FOURTH
Deskphone	Y	N	N	N	NA	NA	NA	NA
External Phone	N	Y	N	N	NA	NA	NA	NA
PC MiNet Softphone	Y	N	Y	Y	NA	NA	NA	NA
PC SIP Softphone	Y	N	Y	Y	NA	NA	NA	NA
Mobile SIP Softphone	Y	N	Y	Y	NA	NA	NA	NA
Next Gen Mobile SIP Softphone	Y	N	Y	Y	NA	NA	NA	NA
Hotdesk	Y	N	N	N	NA	NA	NA	NA

ACD	N	N	N	N	NA	NA	NA	NA
ACD With Softphone	N	N	N	N	NA	NA	NA	NA
Generic SIP	Y	N	Y	Y	NA	NA	NA	NA
MiVoice Conference Phone	Y	N	Y	Y	NA	NA	NA	NA

Table 7: Phone Types by Service Type - Premium UCC License

SERVICE TYPE	MICLOUD BUSINESS VIRTUAL USER BUNDLE (MLB)				MICLOUD BUSINESS MULTI-INSTANCE			
PHONE TYPE	PRIME	SECOND	THIRD	FOURTH	PRIME	SECOND	THIRD	FOURTH
Deskphone	Y	N	N	N	NA	NA	NA	NA
External Phone	N	Y	N	N	NA	NA	NA	NA
PC MiNet Softphone	Y	N	Y	Y	NA	NA	NA	NA
PC SIP Softphone	Y	N	Y	Y	NA	NA	NA	NA
Mobile SIP Softphone	Y	N	Y	N	NA	NA	NA	NA
Next Gen Mobile SIP Softphone	Y	N	Y	Y	NA	NA	NA	NA
Hotdesk	Y	N	N	N	NA	NA	NA	NA
ACD	N	N	N	N	NA	NA	NA	NA
ACD With Softphone	N	N	N	N	NA	NA	NA	NA
Generic SIP	Y	N	Y	Y	NA	NA	NA	NA
MiVoice Conference Phone	Y	N	Y	Y	NA	NA	NA	NA

Table 8: Phone Types by Service Type - Contact Center Agent

SERVICE TYPE	MICLOUD BUSINESS VIRTUAL USER BUNDLE (MLB)				MICLOUD BUSINESS MULTI-INSTANCE			
PHONE TYPE	PRIME	SECOND	THIRD	FOURTH	PRIME	SECOND	THIRD	FOURTH
Deskphone	N	NA	NA	NA	N	NA	NA	NA
External Phone	N	NA	NA	NA	N	NA	NA	NA
PC MiNet Softphone	N	NA	NA	NA	N	NA	NA	NA
PC SIP Softphone	N	NA	NA	NA	N	NA	NA	NA
Mobile SIP Softphone	N	NA	NA	NA	N	NA	NA	NA
Next Gen Mobile SIP Softphone	N	NA	NA	NA	N	NA	NA	NA
Hotdesk	N	NA	NA	NA	N	NA	NA	NA
ACD	Y	NA	NA	NA	Y	NA	NA	NA
ACD With Softphone	Y	NA	NA	NA	Y	NA	NA	NA

Generic SIP	N	NA	NA	NA	N	NA	NA	NA
MiVoice Conference Phone	N	NA	NA	NA	N	NA	NA	NA

Table 9: Oria Administrator Bundle Features

BUNDLE TYPE	FEATURE	DESCRIPTION
Administrator Bundle	ACD	The ACD Group feature allows you to create groups of users that can be placed in call paths such as those used by call centers and support groups.
	Advanced Settings	Allows the user to modify business hours.
	Auto Attendant	Allows the user to create, modify and delete Auto Attendant call flows.
	Call Flows	Allows the user to create, modify and delete company call flows.
	Call Groups	Enable user to create, add or remove users to Pickup Groups, Hunt Groups, and Ring Groups.
	Call Rerouting Destinations	Lets the system redirect calls to alternate answering points or devices.
	Company Speed Dial	Enable user to create, modify and delete company wide speed dial numbers.
	Email Capabilities	Enables the user to send information emails and reset passwords.
	General Mailbox	Allows the user to create, modify and delete general company mailboxes.
	Hot Desk Phones	Allows users to create, modify and delete hot desk devices.
	Key Templates	Lets you manage and assign key templates.
	Music On Hold	Lets you enable and upload embedded Music On Hold (MOH) for a site.
	Synchronize Platforms	Lets you initiate the Synchronize Platforms operation for a Customer.
	Users	Provides access to the directory to create, modify and delete a customer's users.

CREATE BUNDLES

Bundles are groups of features, phone types, and devices that you assign to one or more customers. There are two types of Bundles that can be created in Oria:

- Administrator

- User

Administrator bundles typically provide access to other system management functions such as managing Call Groups, Hot Desk Phones, and Key Templates.

User bundles are primarily based on the service and license types you choose. See Planning Bundles for Customers.htm for details about user bundle services by license type.

USER BUNDLE SERVICES AND LICENSE TYPES

The services available for user bundles are MyCloud Business Multi-Instance and MiCloud Business Virtual. Each MiCloud service provides a number of license types to choose from:

MiCloud Business Multi-Instance

- Basic IPT
- Standard IPT
- Entry UCC
- Contact Center Agent

MiCloud Business Virtual

- Basic IPT
- Standard IPT
- Entry UCC
- Standard UCC
- Premium UCC
- Contact Center Agent

Notes: When you downgrade a user bundle from Oria, for example a user going from 3 phones down to 2, the MiCollab Client API will cause the user's status to be deleted and recreated. The user will need to logout of MiCollab Client, log in again and manually recreate their routing rules (set which devices will ring in different states).

When you change a bundle that includes a teleworker set (registered to MiVoice Business), the configured ICP on the MBG reverts to the default and the teleworker set logs out. To fix this issue, manually change the ICP on the MBG back to the configured ICP. The MAC address is not affected.

To meet the demands of potential customers, design a variety of bundles, and then create them on the system.

You must create at least one user bundle before you or a customer administrator can create a user.

CREATE USER BUNDLES

To create a User bundle

1 From the Oria system portal, click the **Bundles** tab.

2 Click **Create Bundle**.

3 Select **User Bundle** and click **Next**.

4 Enter a name, code, and description for the bundle.

> **Note:** If you are deploying MiCollab Clients for Mobile users, you need to create a special User Bundle of type Next Gen Mobile SIP Softphone. See MiCollab Clients for Mobile.

5 Under **Phone User Features**, select the service and license types for phone users. The optional features and profiles available will depend on your selections. See Planning Bundles for Customers for information about the service and license types.

6 Under **Select Optional Features**, do the following:

- Select the optional features for the service and license type.
- Select the devices to include in the bundle.

7 Click **Submit**.

8 (optional) Upload any setup instructions that you want to include as an attachment in the Welcome Email.

9 Click **Save**.

> **Notes:**
>
> Sometimes failures may occur during a change bundle operation. It is now possible to rollback the change to its previous configuration. Should a failure occur during a Change Bundle operation, there will be a series of guided prompts in Oria to either correct the error or revert back to the previous bundle configuration.
>
> The Oria MiCollab Bundle only enables the Advanced MiCollab Unified Messaging Telephone User Interface features. You must log into Server Manager and open the Nupoint Web Console to provision the end user's Adv. UM Alias, and password (if required).

To create an Administrator bundle

1 From the Oria system portal, click the **Bundles** tab.

2 Click **Create Bundle**.

3 Select **Administrator Bundle**.

4 Enter a name, code, and description for the bundle.

5 Under **Select Site Administration Features**, assign access permissions for the bundle.

6 Click **Submit**.

To change a bundle

1 From the Oria system portal, click the **Bundles** tab.

2 Select the bundle you want to modify.

> **Note:** The bundles list is grouped based on the initial bundles users were created with (Hotdesk or non-Hotdesk). If the user was created with a Hotdesk bundle, you cannot change it back to a non-Hotdesk bundle. The same applies to changing a non-Hotdesk bundle to a Hotdesk bundle.

3 Click the **Edit** icon.

4 Make the required changes.

Note: A bundle change does not trigger a resend of the Welcome email. Make sure you resend the Welcome email manually so that users can receive the updated bundle information.

5 Upload any updated setup instructions that you want to include as an attachment in the Welcome Email.

6 Click **Save**.

7 Log out and log back into Oria to enable your changes.

MICOLLAB CLIENTS FOR MOBILE

If you are deploying MiCollab Clients for mobile users, you need to create a special User Bundle of type Next Gen Mobile SIP Softphone.

When you assign a Next Gen Mobile SIP Phone for MiCollab Client, make sure that you add text in the Welcome email to notify users that they will receive an additional email with instructions on how to deploy the Next Gen Mobile Phone application. For instructions on how to set up MiCollab Client for Mobile users, see *Optional: Prepare MiCollab Client for mobile users* in the MiCloud Business for Service Providers Deployment Guide.

Important: If users are receiving the Welcome email but not the Deployment email, make sure that the MiCollab server is able to contact the redirect server. Look in the MiCollab server logs for the error "Could not connect to Server... Network is unreachable".

Here is an example of a deployment email sent to a user:

Deployment Email for MiCollab for Mobile Application

Dear Ginette Thibault,

You are receiving this e-mail because your Mitel MiCollab administrator has started the deploymen
Please install the client application on your mobile phone first.
For installation of the client, please use the App Store of your mobile phone platform.

If you are reading this on your mobile phone, and you have downloaded and installed the MiColla
deployment process: click here

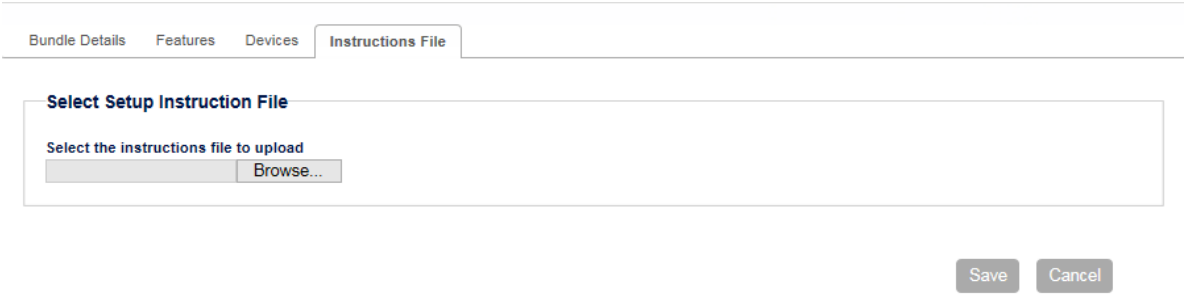
If you are reading this e-mail on your PC, or your administrator printed the e-mail, and you have d
reader application on your mobile phone to scan the QR-code below.

You can also start the deployment process by launching the MiCollab for Mobile application on yo
Please use the following key: 52bde5a887c67e24c97c2868195ebc9b

NOTE: This is an automatic e-mail notification. Please do not reply to this email. Replies will not b

UPLOAD BUNDLE SETUP INSTRUCTIONS

When you create a bundle, you can choose to upload setup instructions for users. The instructions are sent as an attachment in the Welcome email and also made available (download) in the user portal My Services page. All documents file formats are supported and there are no file size restrictions.



REGISTER DIALING PRIVILEGES

Dialing Privileges correspond to Class of Restriction (COR) numbers that have been pre-configured to specific Automatic Route Selection (ARS) routes programmed on the default MiVoice Business database.

As a recommended guideline:

- Create and pre-configure all required Dialing Privileges on the default MiVoice Business database prior to customer creation.
- Design the Dialing Privileges based on predictions of where calls will come from and what type of outbound calling privileges will be required.
- Configure the Dialing Privileges to be the same on every MiVoice Business Platform that is managed using Oria. The goal is to create a shared set of dialing privileges that can be assigned to any customer provisioned using Oria and allow each customer to access the same routes. Due to this requirement, a Default MiVoice Business Platform Database must be created to include ARS programming that can be set for all MiVoice Business Platform instances.

To plan and determine the necessary dialing privilege requirements:

1 Determine cities, states/provinces, and countries in which service will be provided.

2 Gather all dialling patterns (local, long distance, international, etc.) that will be offered.

3 Determine all required Dialing Privileges to satisfy customer needs. (Capturing this information in a spreadsheet will make it easier to enter the information in Oria.)

4 Ensure design has been completed properly for default MiVoice Business Platform data- base configuration.

To register Dialing Privileges:

1 Log in to Oria.

2 Click the **Telephony** tab and select **Dialing Privileges**.

3 Click **Register Dialing Privilege**.

SET UP PHONE KEYS

You can set up phone keys and default Key Templates from within the service provider portal and assign them to a customer during customer creation. After a template is assigned, changes made to it from the service provider portal are not applied to the template viewed by the Customer Administrator. The Customer Administrator sees the template as it was initially configured.

CREATE KEY TEMPLATES

Service Providers can create Key Templates for Customer Administrators to use when setting up users instead of programming the keys manually.

> **Important:** The programming of SIP DECT Phone Set keys is not supported in the Customer Administrator Portal.

To create a Key Template:

1 From the **Telephony** tab, click **Key Templates**, then click **Create Template**.

2 (optional) In **Phone Layout**, select the phone layout to display. Leaving the setting at default displays all the possible phone keys.

3 Program each key by clicking it and setting the features. You can also apply the template to users who have one row of keys.

4 Click **Save**.

CREATE BRANDS

Color schemes and images displayed throughout the portal can be created and modified to match a corporate brand or other desired customized brand. Multiple brands can be created on the system, which allows different service provider customers to have different portal branding schemes assigned to them.

The following modifiable branding options are available:

- Company Logo
- Login Page Image
- Portal Banner Image

a Favicon Image (Browser Tab)

- Navigation Bar Color
- Heading & Page Link Color

Use the brand creation wizard to create a customized brand that can be assigned to one or more customers. Users will see the images and colors associated with the brand assigned to their company while logged into the portal. When a change is made to a brand it is reflected across the system and any customers that were assigned the initial brand will see the changes when they log into the portal.

To create a Corporate Brand:

1 Collect the following information:

- URL for the following company pages:
- Company Website
- Terms of Use Page
- Privacy Policy Page

2 Image of the corporate logo:

- Recommended Dimensions: 60 pixels (height)
- Supported Formats: JPG / GIF / PNG

3 Design and create the following corporate images:

b Login page

- Recommended Dimensions: 575 pixels X 230 pixels
- Supported Formats: JPG / GIF / PNG

c Portal banner

- Recommended Dimensions: 950 pixels X 150 pixels
- Supported Formats: JPG / GIF / PNG

d Favicon (browser tab)

- Recommended Dimensions: 17 pixels X 17 pixels
- Supported Formats: ICO. An error message appears when the image is not in the correct format.

4 Determine color scheme for navigation bar and headings / page links. Color Code: HEX / RGB / HSB

5 Log in to Oria, click the System tab, select **Brands**, then click **Create Brand**.

CREATE THE WELCOME EMAIL

A Welcome Email is the email message that new users receive when their account is created. Typically a Welcome Email contains welcome text and user login credentials. The Welcome Email is derived from the default email template through customization. A service provider creates and edits email templates in System > Email Template.

Oria displays the Welcome Email in the receiver's language as long as that language is supported.

Important: If you need to stop Welcome Email messages from being sent from MiCollab, you must disable the option from MiCollab (after upgrading to Oria 5.3).

The following flowcharts outline the steps required for setting up and generating the Welcome Email:

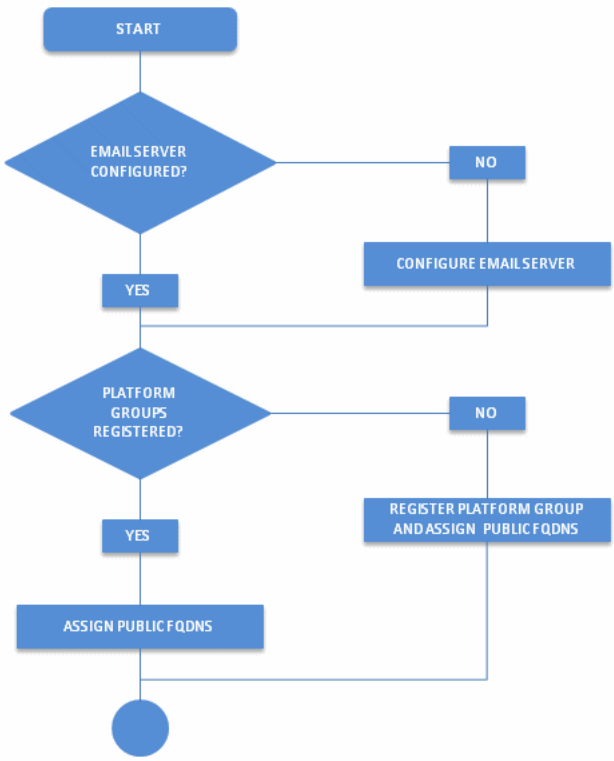


Figure 1: Register Platform Group and Setup Email Server

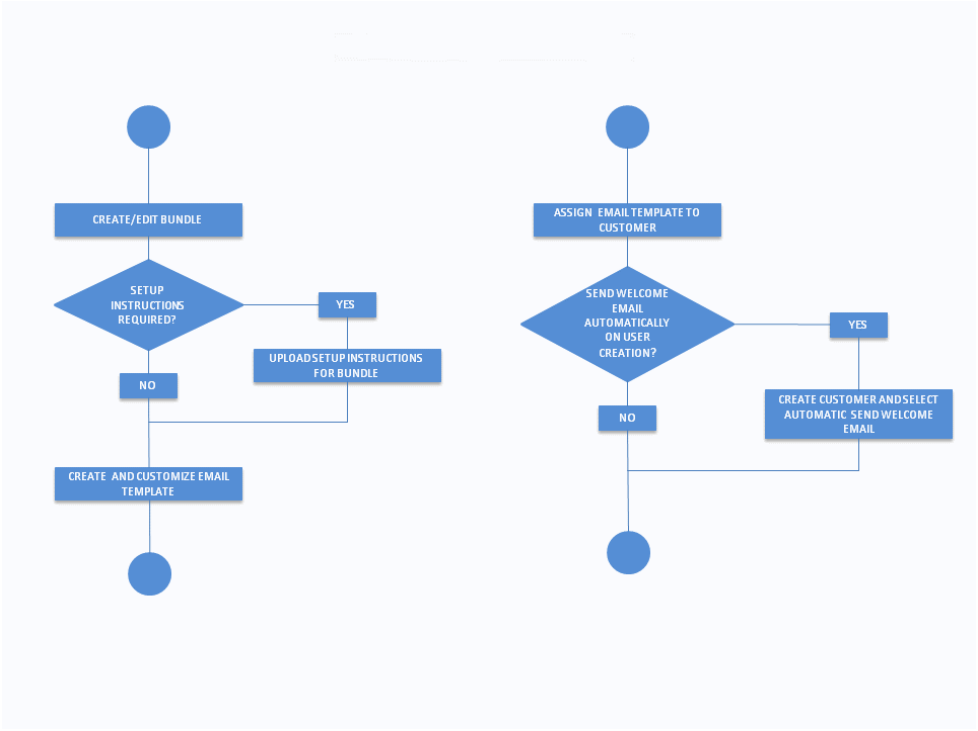


Figure 2: Create Bundle and Email Template

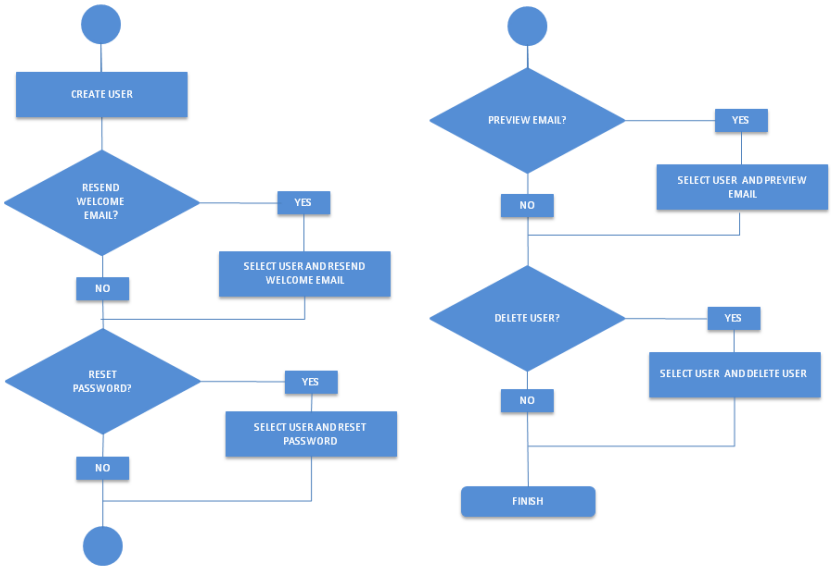


Figure 3: User Creation and Welcome Email

You can send a Welcome Email manually by selecting the user and then selecting the "Send Welcome Email" action. Or you may prefer to send the Welcome Email automatically to all users when they are created. Bulk Import supports the automatic sending of the Welcome Email on user creation. When users are added using Bulk Imports the Welcome Email is automatically sent to each user. Oria provides a default email template with pre-populated content and all services enabled for both new installs and product upgrades. You cannot delete the default email template.

Any setup instructions that you upload are sent with the Welcome Email and they are also accessible from the user's My Services page.

A Welcome Email can contain the following types of information:

- Customized content
- List of services the user has access to
- User name and password
- Links to services
- Links to application downloads

LANGUAGE SUPPORT

The Subject, Greeting, and Footer text fields all support international text (UTF-8).

DEFAULT EMAIL TEMPLATE CONTENT AND OPTIONS

The default Email template contains editable pre-populated content and has all options enabled:

- Sender's email address in the format donotreply@<OriaPublicFQDN>.com. The service provider can change the sender's email address if required.
- Greeting text.
- Footer text.
- Subject text: "Welcome to the User Portal," <lastname, firstname of the user as a suffix>

Note: The Subject field supports plain text only.

- All the options are selected for the email and portal.
- Branding in the email is picked up from the service provider's branding. The banner image is used in HTML email messages.

ASSIGNING EMAIL PERMISSIONS

A service provider must assign customer administrators the Email capability in the Admin Bundle to allow them to resend the Welcome Email, reset passwords, and preview email messages. The automatic sending of the Welcome Email on user creation is always set by the service provider.

EMAIL TEMPLATE PERMISSIONS

The email capability in Admin Bundle is required to let the Customer Admin send Welcome Emails, Reset passwords and Preview Emails. If a customer is not assigned with a bundle with the email capability, only the service provider can "login as" a customer administrator to resend Welcome Emails or reset passwords. The customer administrator will not see those actions.

However, enabling or disabling the email capability from the Admin bunde does not affect the automatic sending of Welcome Emails on user creation. The automatic sending of the Welcome Email is governed by a checkbox in the add/edit cutomer page.

Here is a summary of the permissions granted for email templates and messages:

- Email template privileges are managed through Operations profiles.
- Only the service provider can create email templates.
- A service provider should not include the email capability in the Admin Bundle assign to a customer if the permission to send email messages is not wanted.
- A service provider configures whether Welcome Email messages are automatically sent when a user is created. This will be done while creating the customer.
- A customer can send Welcome Email messages only when the Welcome Email template is assigned to them by a service provider.
- A customer can resend a Welcome Email or reset a password when assigned a bundle with those rights.
- With email rights, a customer can upload instructions when configuring the email template.

The instructions are sent with the email and also appear in the My Services page.

CUSTOMIZE THE WELCOME EMAIL CONTENT

You can customize the information in the Welcome Email and have it automatically sent when a customer adds a new user to the portal. Service providers assign email templates to Customers during Customer creation. Customers can then use the templates to send automatic email messages with relevant information. For example, sending a reminder email message when a password is reset.

Access to the Welcome Email feature is granted through:

- Any operations profile with the permission to create customers has access to the Welcome Email feature.
- All the Admin bundles that allow you the creation of users has access the Welcome Email feature.

To customize the Welcome Email:

1 Configure the username in the subject of the email and choose whether the name a suffix or a prefix.

2 Add a custom header and footer. Headers and footers can contain HTML content.

3 Customize the email message as required. You may want to include a note for users who have Next Gen Mobile SIP Phones that they will receive an email with instructions on how to install the MiCollab for Mobile application.

4 Choose the options to include in the email for the user, for example the user name, pass- word, links to application downloads and so on. Only the selected option appear in the email message or the services page.

5 (optional) Upload setup instructions that you want to send as an attachment.

To preview the Welcome Email

1 Click **Customer > View Customers**.

2 Select the Customer and click the **Log in as Customer** icon.

3 From the Customer Administrator portal, click the **Users** and select the user.

4 Click **More > Preview Email**.

To resend the Welcome Email

1 Click **Customer > View Customers**.

2 Select the Customer and click the **Log in as Customer** icon.

3 From the Customer Administrator portal, click the **Users** and select one or more users.

4 Click **More > Resend Welcome Email**.

To reset the password

1 Click **Customer > View Customers**.

2 Select the Customer and click the **Log in as Customer** icon.

3 From the Customer Administrator portal, click the **Users** and select one or more users.

4 Click **More > Reset Passcode**.

CREATE EMAIL TEMPLATES

A service provider or anyone with email template privileges can create and configure email templates for customers. Customers then use the templates to send email messages with specific information in them to one or more customers. For example, an email message that reminds users to change their password.

To create an email template

1 From the **System** tab click **Email Template** and then click **Create Email Template**.

2 Enter the email template details and select the content to include in the email message.

SET UP MICOLLAB CLIENTS

MICOLLAB CLIENTS FOR MOBILE

If you are deploying MiCollab Clients for mobile users, you need to create a special User Bundle of type Next Gen Mobile SIP Softphone.

When you assign a Next Gen Mobile SIP Phone for MiCollab Client, make sure that you add text in the Welcome Email to notify users that they will receive an additional email with instructions on how to deploy the Next Gen Mobile Phone application. For instructions on how to set up MiCollab Client for Mobile users, see *Optional: Prepare MiCollab Client for mobile users* in the MiCloud Business for Service Providers Deployment Guide.

> **Important:** If users are receiving the Welcome Email but not the Deployment email, make sure that the MiCollab server is able to contact the redirect server. Look in the MiCollab server logs for the error "Could not connect to Server... Network is unreachable".

Here is an example of a deployment email sent to a user:

Deployment Email for MiCollab for Mobile Application

Dear Ginette Thibault,

You are receiving this e-mail because your Mitel MiCollab administrator has started the deploymen
Please install the client application on your mobile phone first.
For installation of the client, please use the App Store of your mobile phone platform.

If you are reading this on your mobile phone, and you have downloaded and installed the MiColla
deployment process: click here

If you are reading this e-mail on your PC, or your administrator printed the e-mail, and you have d
reader application on your mobile phone to scan the QR-code below.

You can also start the deployment process by launching the MiCollab for Mobile application on yo
Please use the following key: 52bde5a887c67e24c97c2868195ebc9b

NOTE: This is an automatic e-mail notification. Please do not reply to this email. Replies will not b

MICOLLAB MAC CLIENTS

If you are deploying MiCollab MAC Clients, you must enable MAC Client support in Oria and create a user bundle that includes a PC SIP Softphone for a MAC Desktop Client or a Next Gen Mobile Client Softphone phone for a Mobile Client.

After you enable MiCollab MAC Client, make sure that you either attach a file with deployment instructions (see Deployment Email Template below) to the Welcome Email or go to MiCollab Client Deployment and customize the MiCollab Deployment email.

Deployment Email Template

Here is a recommended template to use for the MAC Clients deployment email:

Dear [####firstname####] [####lastname####],

You received this e-mail because your Mitel MiCollab administrator has started the deployment process for your Mitel MiCollab Client for extension number [####dn####].

Please first refer to your Welcome E-mail to determine if extension number [####dn####] is a Mobile Client or a MAC Desktop Client. The extension will have a "Next Gen Mobile Client Softphone" phone type for a Mobile Client and a phone type of "PC SIP Softphone" for a MAC Desktop Client.

For installation of the client, please use the App Store for your device.

[####appstore####][####playstore####][####microsoftstore####][####bbworld####] [####appstore_mac####]

If you are reading this on your mobile phone, PC or MAC, and you have downloaded and installed the MiCollab for Mobile Application, then please use the following direct link to start the deployment process: [####link####]

If you are reading this e-mail on your PC or MAC, or your administrator printed the E-mail, and you have downloaded and installed the MiCollab for Mobile application, use a QR-code reader application on your mobile phone to scan the QR-code below.

You can also start the deployment process by launching the MiCollab Client application on your phone or MAC. The client will request to enter the authentication key.

Please use the following key: [####authtoken####]

NOTE: This is an automatic e-mail notification. Please do not reply to this email. Replies will not be read.

[####qrcode####]

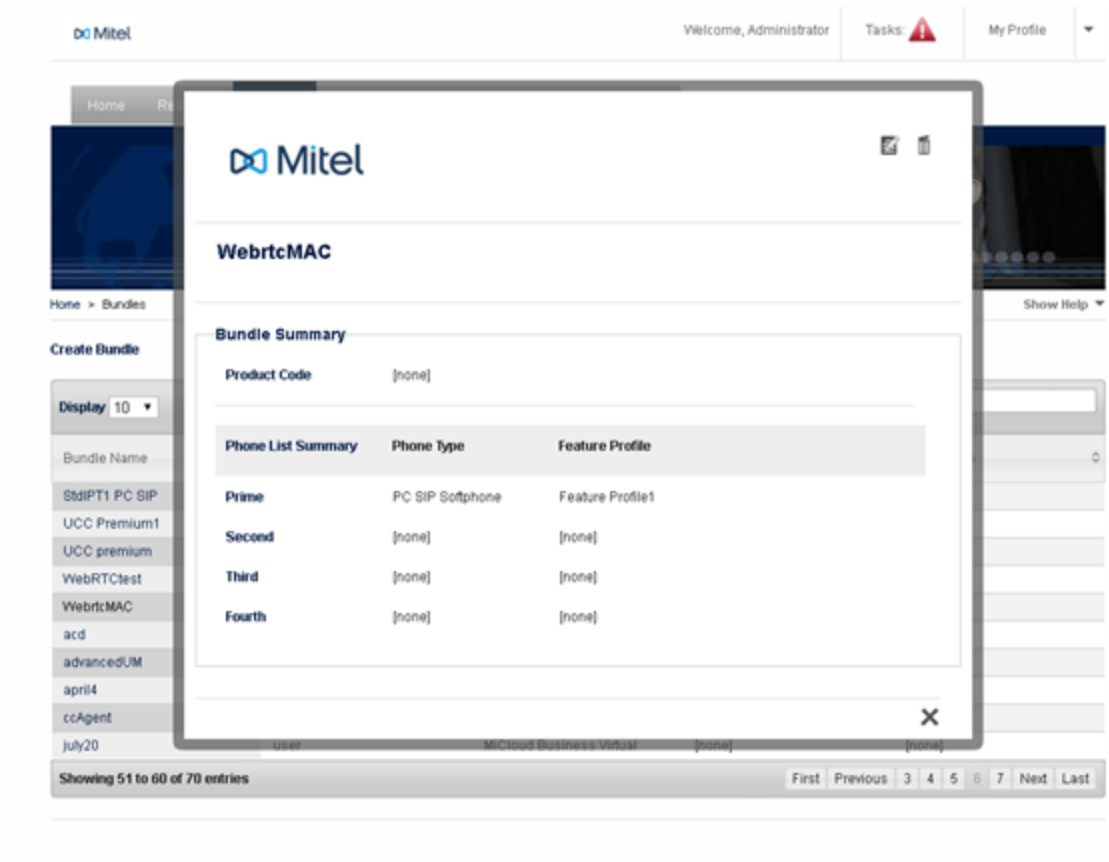
PROVISION A WEBRTC MICOLLAB WEB CLIENT

WebRTC provides a web-based softphone that you access from a browser. The softphone supports audio calls using your PC microphone and speakers or USB headset.

To provision a WebRTC MiCollab Web Client:

The user will receive a deployment email with their MiCollab Web Client URL and a username. The user's password is sent in another email and the user can access MiCollab Web Client.

- Create a user that has a PC SIP Softphone in the bundle.



Important: Only Chrome and Firefox are supported for the WebRTC MiCollab Web Client.

BULK IMPORT USERS

Download the import spreadsheet for the customer, fill it in, and import the changes back into the portal. After filing in the information, import the spreadsheet back into the portal. It is best practice to import the spreadsheet back into the portal before making changes to customer MiVoice Business platforms, dialing privileges, bundles, or feature profiles. The maximum number of users you can delete at one time is 200.

If you have an Active Directory file, you can merge the .ldif file into the Oria Bulk Import workflow. See Associate Active Directory Fields with Bulk Import Fields.

To bulk import users:

1 From the **Customers** tab, click **Bulk Import**.

2 Click **Import Users**.

3 In **Step 1: Get Import File**, select the customer to which you want to add the users.

4 Fill the required fields by following the instructions in the import spreadsheet.

5 In **Step 2: Select Import File** Click Browse, select the updated spreadsheet.

6 Click **Submit**. To ensure the import runs smoothly, most of the portal locks during the import.

ADVANCED SETTINGS

Advanced settings allow you to configure Key Permissions, Auto Attendant, Ranges, and Call Flow options.

KEY PERMISSIONS

Set key permission to allow users to create and edit key templates and program phone keys.

To set key permissions:

1 From the **Systems** tab, click **Advanced**.

2 Click the **Key Permissions** tab.

3 Select the key permissions for these users; Service Provider (SP), Reseller (RS), Customer Administrator (CA) and End User (EU). By default, all keys are available to administrator level users.

4 Click **Save**.

AUTO ATTENDANT

Auto Attendant settings display when the platform group type is MiVoice Business. For MiCollab and MiVoice Business Express, only the Voicemail Hunt Group Pilot Number field is displayed. You can program the following settings:

Voicemail Hunt Group Pilot Number: Program the Voicemail Hunt Group Pilot Number. For example: 6000.

Bilingual Options for Auto Attendant: Enable or disable the bilingual option for Auto Attendant and program the bilingual Key Number. For example: 8.

Default passcode for Auto Attendant Mailboxes: Program the default passcode for Auto Attendant mailboxes. For example: 1111.

Supervised Transfer for Auto Attendant: Enable or disable Supervised Transfer for the Auto Attendant and program the Ringback Timeout. For example: 17 seconds. For more information, see *System Applications* > *Messaging* > *Voice Mail (Embedded)* > *Programming* > *Setting the Auto Attendant Transfer Type* in the MiVoice Business System Administration Tool Help.

To program Auto Attendant settings:

1 From the **Systems** tab, click **Advanced**.

2 Click the **Auto Attendant** tab.

3 Enable, disable, and program the Auto Attendant settings.

4 Click **Save**.

RANGES

Lets you specify the lower and upper ranges for creating Speed Dials, generating Auto Attendant and General mailboxes, and generating directory numbers for Call Flows.

To program upper and lower ranges:

1 From the **Systems** tab, click **Advanced**.

2 Click the **Ranges** tab.

3 Program the ranges for Speed Dials, Auto Attendant and General mailboxes, and directory numbers for Call Flows.

4 Click **Save**.

CALL FLOW

Lets you specify default Call Flow settings:

Feature Access Codes: Program the Feature Access Codes the system will use for Call Flows:

- Message Waiting - Activate
- Message Waiting - Deactivate
- Dialed Day/Night Service - Activate
- Call Forward - Follow Me - Third Party

Default Key Starting Position: Program the default phone key starting positions for users' phones.

- Key line appearance
- Message Waiting Indicator
- Day/Night Service activation

To specify default Call Flow settings:

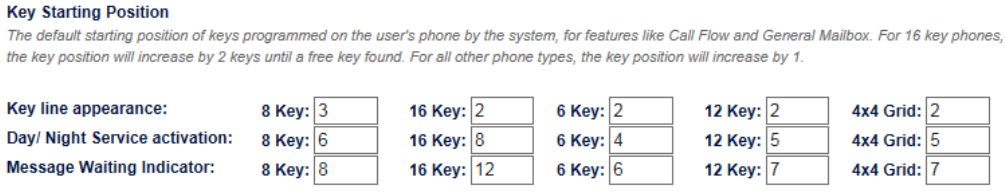
1 From the **Systems** tab, click **Advanced**.

2 Click the **Call Flow** tab.

3 Program the Feature Access codes and default key starting positions.

> **Note:** Key starting positions apply when the user's prime phone is a Desktop phone. It does not apply to Hotdesk or ACD users. The Hotdesk/Hotdesk user's key starting position follows the 16 key phone.

4 Click **Save**.



SET UP CUSTOMERS

> **CAUTION:** You must create and provision users before connecting those users' phones. If not, you will receive an error in indicating that the devices already exist on the MBG and cannot be assigned to those users.

Oria provides customers with access to the Customer Administrator self-service web portal to perform the following specific site administration operations:

- Add and delete users
- Create customized device key templates for users
- Configure call groups (hunt, ring, and pickup)
- Setup group voicemail box
- Add and delete groups
- Create company-wide system speedcall numbers

Additionally, users have access to a variety of phone features defined by their assigned bundle. Oria enables the service provider to offer a self-service web portal where end users can perform the following tasks:

- Check missed calls even when away from their desk (applies to desktop phones only)
- Customize their phone and setup multiple speed dial keys
- Quickly search the company directory for contact details
- Change their voicemail passcode
- Configure their twinning settings, for example a phone and cell phone

Ensure that all collected customer and business requirements have been implemented in the portal. To provide a customer access to Oria, you must provide the unique URL of the customer portal. If the customer is given full site administration privileges, send the customer the administrator the primary account username and password.

SET UP PLATFORM GROUPS

Use Oria to assign one or more platform groups to a customer. To make a platform group available to a customer, register it and set it up as a site in a resilient or non-resilient environment. After setting up a site, you can set up MiCollab Client Multi-Tenant servers.

Enter a public facing domain name for each platform group you register so that users can access Mitel platforms and the Oria portal. Public facing fully qualified domain names (FQDN) are used to construct URLs. An FQDN is required for the following products:

- MiVoice Business Express
- MiCollab
- Mitel Border Gateway

REGISTER A PLATFORM GROUP

Registering a platform group with the portal allows you to assign it to a customer. Register a platform group with one MiVoice Business or with multiple resilient pairs. For each MyVoice Business pair, you must configure cluster elements in ESM.

Important: When registering a platform group in Oria, the IP or FQDN entered for the hostname appears as the public facing domain name. You can choose to leave the default name or change it. The setting is available in the Advanced Settings page. Only a service provider can change the settings.

To register a platform group:

1 Select **Platforms** > **Platform Groups** and then click **Register Platform**.

Note: Click **Save** to save the changes in the current tab before moving on to the next tab.

2 Select the platform type from the **Type** list.

Notes: It is important to enter the MSL Username and Password in the appropriated fields when registering a MiCollab or MiCollab with Voice platform group. Otherwise, the registration will fail.
When migrating from MiCollab 5.0 SP2 to MiCollab 6.0 SP1, you need to re-enter the MSL Username and Password credentials when performing edit operations (such as when editing a platform group).

3 Click **Submit** to register the platform group.

4 Add the MiVoice Business instance(s).

5 Add Sites as necessary to associate with the platform group.

Note: When creating (or subsequently modifying) Sites and configuring the associated MBG(s), the User Phone Details will show up to four user phones that can be programmed on the MBG. Both the MiCloud Business Multi Instance and MiCloud Business Virtual Entry UCC Bundle has four phones associated with it. See Planning Bundles for the phone types supported for each license type. To ensure that the user's SIP phone number is programmed on the MBG, verify that the Third Phone check box is selected. To ensure that the user's SIP phone number is programmed on the MBG, verify that the Third Phone check box is selected.

6 Add MiCollab Client Tenants as necessary. To enable MiCollab MiTeam, click **MiTeam Service**.

MICOLLAB CLIENTS FOR MULTIPLE TENANTS

Oria allows a Service Provider to set up MiCollab Clients for multiple Customers on the same MiCollab Client server. The Tenants configured in Oria on the same MiCollab Client server appear as a unique Enterprises per Tenant.

Terminology: Note that on the MiCollab Client Server, we use the term Enterprises. On Oria we use the term Tenants. When you create users, they are grouped into their corresponding Tenant/Enterprise.

When the platform group is registered with a MiCollab Client Tenant, Oria creates an appropriate Enterprise on the MiCollab Client server.

> **Note:** After you configure MiCollab through Oria, changes should not be made on the MiCollab Client server; this will cause configuration issues and possible loss of MiCollab Client services.

There are some limitations and restrictions for MiCollab Clients (e.g. Calendar integrations). Refer to the MiCollab Client Administrator Guide and the MiCollab Client Administrator Web Help for more information (go to http://edocs.mitel.com).

Synchronizing Platforms When Using MiCollab Multi-Tenant

A new user created in MiVoice Business does not appear in MiCollab until a synchronization between MiCollab Multi-Tenant and MiVB takes place, which by default is every 24 hours. To synchronize platforms at anytime, use the **Synchronize Platforms** button in the Customer Administrator portal:

- Click **Company** and then select **Advanced>Synchronize Platforms**.

ENABLE MICOLLAB MITEAM

MiCollab MiTeam is a mobile-first on-demand collaboration tool. It provides a persistent workspace for team collaboration with messaging, content sharing, white boarding, and real-time voice and video meetings, allowing teams to communicate in real time no matter where they are.

MiCollab MiTeam is available with Entry UCC based Service Bundles in the SMB architecture and is available with Premium UCC Service Bundles in the MLB architecture. See Planning Bundles for Customers.

To enable MiCollab MiTeam

1 Register the platform group.

2 Click the **MiCollab Client Tenant** tab.

3 Select **MiTeam Services**.

4 Click **Save**.

SET THE MICOLLAB MITEAM DATA CENTER LOCATION

You can set the location of the MiCollab MiTeam data center in the Service Provider Portal to support Data Sovereignty requirements. Oria 5.3 with MiCloud Business 3.3 supports three locations for hosting MiTeam user data; US (default), Europe, and China.

If you have users that reside in both the Europe and the US, set the data center location to EU. The laws in the US allow data storage in Europe.

> **Note:** If you upgraded to Oria 5.3 but are using MiCloud Business 3.2 or earlier, the MiTeam data center location is set to US by default and is read-only (grayed out). The data location setting was not available in MiCloud Business 3.2 and earlier or MiCollab versions earlier than 7.3.

To set the MiTeam data center location

1 Go to **Platforms > Platform Groups**, select the platform group, and then click the **Edit** icon.

2 Click the **MiCollab Client Tenant** tab.

3 From the **MiTeam Data Center Location** list, select the new location.

4 Click **Save**.

CREATE A PLATFORM GROUP USING A BLUEPRINT

Platform Manager provides a way for Service Providers to create MiVoice Business platform groups based on blueprints created with Platform Manager.

Important: If you make a change to the Platform Manager server, for example change the credentials, make sure that you also change them in Oria.

To use Platform Manager blueprints in Oria, follow these steps:

1 Enable the Platform Manager feature.

2 Register Platform Manager.

3 Register a Platform Manager blueprint.

4 Create platform groups using a Platform Manager blueprint.

Note: Blueprints apply to MiVoice Business type platform groups only.

ENABLE THE PLATFORM MANAGER FEATURE

1 From the **System** tab, click **Operations Profile**.

2 Do one of the following:

a To create a new profile and enable Platform Manager, click **Create Operations Profile**, select **Platform Managed** and other features and responsibilities to include in the profile.

b Select the profile, click the Edit icon, and select **Platform Managed**.

3 Click **Submit**.

REGISTER PLATFORM MANAGER

1 From the **System** tab, click **Platform Manager Registration**.

2 Do all for the following:

a In the **Host Name** field, enter the Platform Manager IP address or FQDN.

b In the **Username** and **Password** fields, enter the MSL Admin username and password.

c In the **Password Token** field, enter the token for establishing a trusted relationship between Oria and the Platform Manager.

3 Click **Submit**.

Update a Registered Platform Manager server

You can modify all the settings after you register a Platform Manager server. If the IP address now points to a different Platform Manager server, make sure that you restore a backup from the original Platform Manager server.

> **Important:** Pointing to a completely different Platform Manager server can result in unpredictable results.

Delete a Registered Platform Manager server

You can delete a registered Platform Manager server if no platform groups are configured on it. Deleting the Platform Manager server also deletes all the configured Platform Manager blueprints.

REGISTER A PLATFORM MANAGER BLUEPRINT

Register a Platform Manager blueprint configured in Platform Manager so that you can automatically generate base platform instances during Customer provisioning.

To register a Platform Manager blueprint

1 From the **Platforms** tab, click **Platform Manager Blueprints Assignment**.

2 Click **Register Platform Manager Blueprint**.

3 Enter a unique and meaningful name for the blueprint.

4 Select the Platform Manager blueprint to register.

5 Enter a description for the blueprint, including the specific platform features that are included. Some special characters [/, <, >, :, etc] are not supported.

6 Click **Submit**.

Edit Platform Manager blueprints

You can change the Name, Description and Deprecated fields anytime after creating a blueprint. However, after you use a Platform Manager blueprint to create a platform group, you cannot change it. If you delete the platform(s) that use the blueprint, you can edit the blueprint again.

Delete Platform Manager blueprints

Similar to the Edit operation, you cannot delete a blueprint that was used to create a platform group. If you delete the platform(s) that use the blueprint, you can delete the blueprint.

Deprecate a Platform Manager blueprint

You can deprecate a Platform Manager blueprint so that it can no longer be used to create platform groups. A blueprint that is marked as "Deprecated", does not affect any existing platform groups created with the blueprint.

CREATE A PLATFORM GROUP USING A BLUEPRINT

Create as many platform groups as you need using a blueprint.

Important: After you create a platform group using a blueprint, you cannot add any more MiVoice Business instances to that group.

1 Click the **Platforms** tab, select **Platform Groups**, then click **Register Platform**.

Notes: When registering a Platform, click **Save** when working in each of the tabs associated with the task at hand, before moving on to the next tab.
When registering a platform in Oria, the IP or FQDN entered for the hostname appears as the public facing domain name. You can choose to leave the default name or change it. The setting is available in the Advanced Settings page. Only a service provider can change Advanced settings.

2 Select **MiVoice Business** from the **Type** drop-down list. Blueprints apply to MiVoice Business type platform groups only.

3 Select **Managed Platform**.

4 From the **Blueprints** list, select the blueprint to use to create the platform group.

5 Click **Submit** to register the platform group.

CONFIGURE ORIA IN A NAT NETWORK

NAT-based networks are required for MiCollab Platform-based solutions in MLBs.

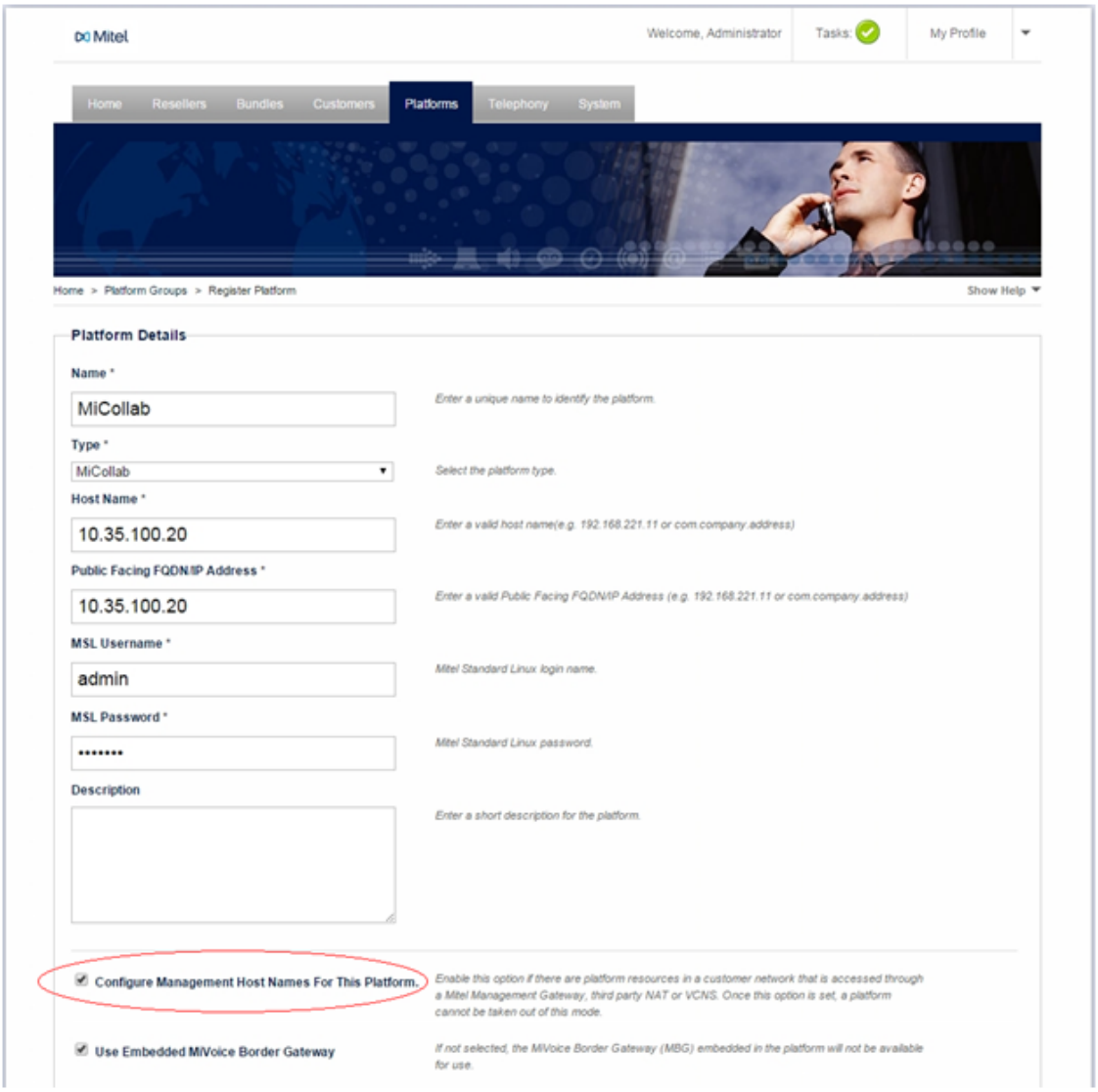
Note: Although the MiCollab Platform based solution includes MiVoice Business nodes there is no NAT support for the MiVoice Business only Platform solution.

For Oria to access nodes (for example, MiVoice Business) from the SP Network, two IP addresses are required:

- Customer Host Name - the IP address configured on the node itself (for example MiVoice Business).
- Management Host Name - the IP address needed to access nodes (for example MiVoice Business) from the Service Provider network.

Step 1 Register the MiCollab platform with NAT support

1 Click the **Platforms** tab, select **Platform Groups**, then click **Register Platform**.



2 Select **Configure Management Host Names For This Platform**. This information tells Oria that the MiCollab is deployed in a NAT network.

Note: You cannot disable the Requires Management Host Name Configuration after you register the MiCollab platform.

3 Enter the required information.

Important: Make sure you enter the Management Host Name IP address in the Host Name field. The Management Host Name IP address is used to access MiCollab from the Service Provide network and is not the actual IP Address (or FQDN) of the MiCollab on the Customer Network. The Public Facing FQDN/IP Address field is independent and has no effect on this configuration.

4 Click **Submit**

Step 2 Configure the MiVoice Business node with the Management Host Name

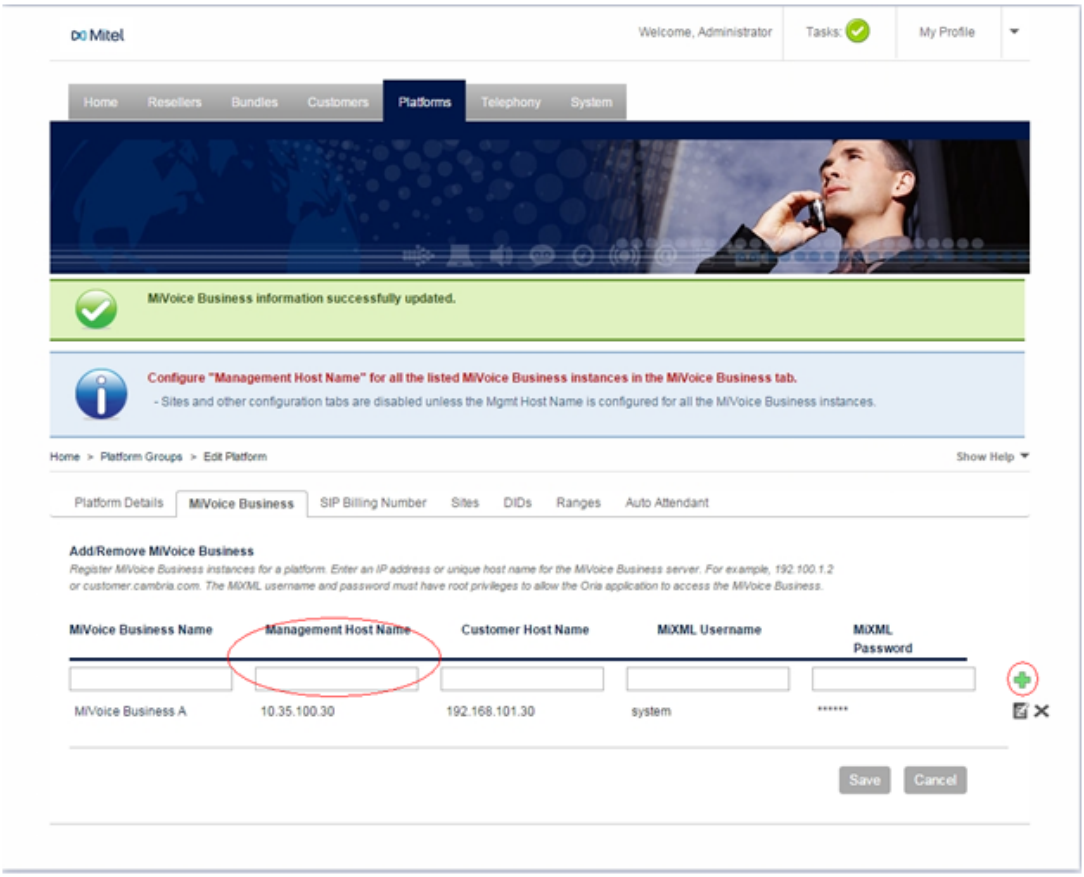
After MiCollab is registered, the MiVoice Business tab lists any MiVoice Business nodes that you add to MiCollab. By default MiVoice Business displays its own IP Address as configured in the Customer Network (the Customer Host Name field). Use the following procedure to configure the Management Host Name so that Oria can access the MiVoice Business from the Service Provider network.

1 Click the **MiVoice Business** tab.

2 Click the **Edit** button for the first MiVoice Business listed.

3 In the **Management Host Name** field, enter the IP Address that is used to access MiVoice Business from the Service Provide network.

4 Click **Save**.



5 If required, configure other MiVoice Business instances.

Step 3 Complete the MiCollab registration

All tabs except for Platform Details and MiVoice Business are disabled until you enter the Management Host Name in Step 2.

1 Use the tabs to configure Sites, SIP Billing Number, and other platform group settings.

2 Click **Save**.

3 See the *Migrate to MiCloud 3.1 Flow Through Provisioning* section in *Upgrade the Oria Software* if you upgraded from MiCloud Business 2.0 to MiCloud Business 3.1.

RECONFIGURE MICOLLAB TO ENABLE NAT SUPPORT

If you previously registered MiCollab without NAT support, you can enable it using the following steps.

To reconfigure MiCollab to enable NAT support

1 Click **Platforms** and then click the Edit icon for the MiCollab platform.

2 From the **Platform Details** tab, enable the "Requires Management Host Name Configuration".

Configure MiVoice Business node with Management Host Name

1 Select the "MiVoice Business" tab. The MiVoice Business nodes are listed with defaulted "Management Host Name" values. The "Management Host Name" is defaulted to the "Local Host Name" (which is the IP Address/FQDN of the MiVoice Business in the Customer network).

2 Click on the Edit button on the first MiVoice Business instance. This will bring up a dialog to enter the "Management Host Name". Remove the defaulted "Management Host Name" IP Address, and enter the IP Address that is used to access the MiVoice Business from the Service Provide network and click Save.

3 Repeat this process as needed for all the listed MiVoice Business instances.

> **Notes:** A MiCollab registered with "Requires Management Host Name Configuration" cannot be reconfigured to disable NAT support. This MiCollab needs to be deleted and re-added.
> See the *Migrate to MiCloud 3.1 Flow Through Provisioning* section in *Upgrade the Oria Software* if you upgraded from MiCloud Business 2.0 to MiCloud Business 3.1.

EXTEND THE NUMBER OF AGENT SKILL GROUPS AVAILABLE IN THE ORIA PORTAL

Each instance of MiVoice Business in Oria can have a maximum of 999 Agent Skill Groups. However, in the Oria portal, call flows use Agent Skill Groups with ACD Paths and by default the Multi-Instance Communications Director (MICD) configuration limits the number of Agent Skill Groups to 64. You can increase this limit by changing the **Extended Agent Skill Group** setting in the **License and Option Selection** form.

CREATE CUSTOMERS

Before you can create a customer, you must have registered a platform group for the customer and configured the bundles intended for sale. Once those are in place, you can create the customer from the Customers tab. When creating a customer, make sure you have the first

customer user's information, the customer's Calling Party Numbers (CPNs) and, if necessary, the customer's CESIDs that are available.

Ensure that all collected customer and business requirements have been implemented in the portal. To provide a customer access to Oria, you must provide the unique URL of the customer portal. If the customer is given full site administration privileges, send the customer the administrator the primary account username and password.

CUSTOMER ADMINISTRATOR TASKS AND PERFORMANCE

A customer administrator can carry out simple tasks that do not rely on referenced records while new background tasks are pending (asynchronous). More complex tasks that rely on referenced records (for example general mailboxes) may need to complete before starting new tasks that reference the current background task.

Important: If you choose an extension length of 7 for a customer and then create a bundle with two or more phones, the customer will not be able to create a user with that bundle.

To create a customer:

1 From the **Customers** tab, click **View Customers**.

2 Click **Create Customer**.

3 Enter the following information:

a Customer Information

- Enter customer details.
- Select the customer's time zone.
- Select portal branding.

b Platform Assignment

- Assign a platform to the customer.

c Extension Length

- Select the extension length for phones.

d Dialing Privilege Assignment

- Select dialing privileges.

e Key Templates

- Add or remove phone key templates.

f Email Template Assignment

- Select the default email template for the customer.

g Billing Change Notification (optional)

- Click the check box to enable Billing Change Notification.

h Time Zone

• Select the default time zone for the customer.

i CPN Substitution

• Enter the caller ID information that will appear on the called party's phone.

j Emergency Details

• Enter the emergency site name, number and default emergency information.

k Bundle Assignment

• Enter the quantity of each type of bundle to assign to the customer.

l Hotdesk Devices

• Select one or more hotdesk devices to add as options for this customer.

m Primary Administrator of Customer

• Select Language - Select a language preference for the customer's end user portal.

• Personal Details - Enter the Administrator's name and email address.

• Login Details - Enter the Administrator's username and password.

• Bundle Assignment - Select a bundle for the Administrator.

4 Click **Submit**.

ADD OR REMOVE DID RANGES

A Direct Inward Dialing (DID) number is the number dialed from a public network through a trunk line to a site's PBX and then to a user's phone. It provides an individual phone number per person in a company by allowing multiple lines to be connected to the PBX all at once without requiring each to have a physical line connecting to the PBX.

To add DID ranges

1 From the **Customers** tab, click **View Customers**.

2 Select the customer and click the **Edit** icon.

3 Click the **DID Ranges** tab.

4 Do any of the following:

a To add a DID or DID range, enter the Range Start and Range End value and click the **+** sign.

b To remove a DID or DID range, enter the Range Start and Range End value and click the **-** sign or click the **X** next to the range you want to remove.

5 Click **Save**.

To assign a platform group to a customer:

1 Create a new customer and assign a Platform Group using the Create Customer wizard.

2 Create a new user for the customer and assign a Site using the Create User wizard.

> **Note:** Oria prohibits the creation of duplicate SIP usernames. Do not create users with duplicate SIP user names for multiple customers that share the same MBG. You will get an error when you try to create the second one with the same SIP.

- When modifying a Customer that requires a connection to the MiCollab Server, and if the connection to the Platform Group fails for any reason and an error message displays or if the rollback fails, carry out the following and re-try the edit operation again:
  - Check the network connection
  - Ping the Platform to ensure it is reachable
  - Try editing another Customer (if applicable) to see if the same error occurs. A live network connection is to MAS and MCD is required to create a platform.

MAP ACTIVE DIRECTORY FIELDS WITH BULK IMPORT FIELDS

A Service Provider can now merge an .ldif file into the Oria Bulk Import workflow. Active Directory Association uses existing fields in Active Directory (AD) and allows you to re-use them to map to specific fields in the Oria Bulk Import or add custom fields into an AD schema.

Considerations

Keep these points in mind that AD:

- is only accessible when a Service Provider performs a **Log in as Customer**.
- only imports .ldif files created from AD.
- Administrators can only upload and work with one ".ldif" file at a time.
- Administrators must know and understand the attributes in an ldif file in order to perform the mappings.

Here are the steps required to associate AD with the Oria Bulk Import:

1 Log in to access Active Directory Association.

2 Upload .ldif files.

3 Map the fields.

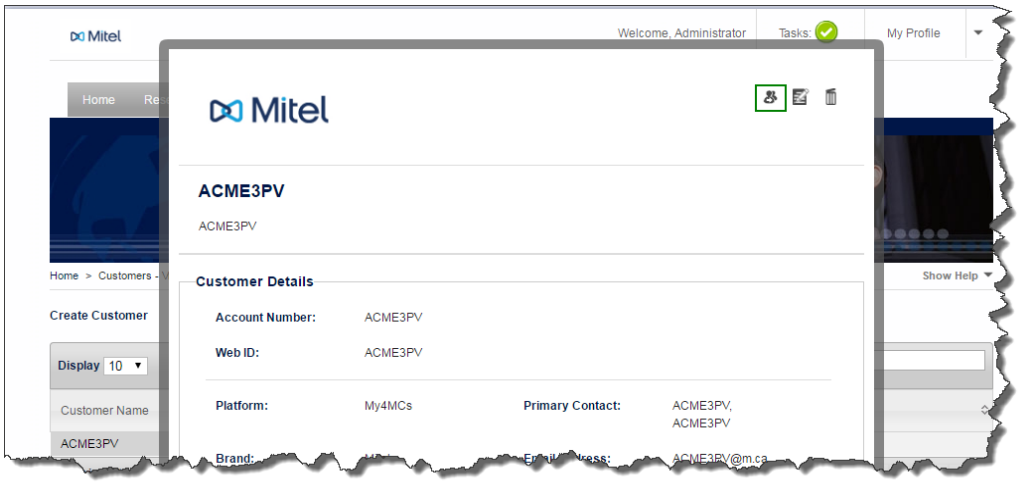
4 Assign bundles to users.

5 Import the changes back into the portal

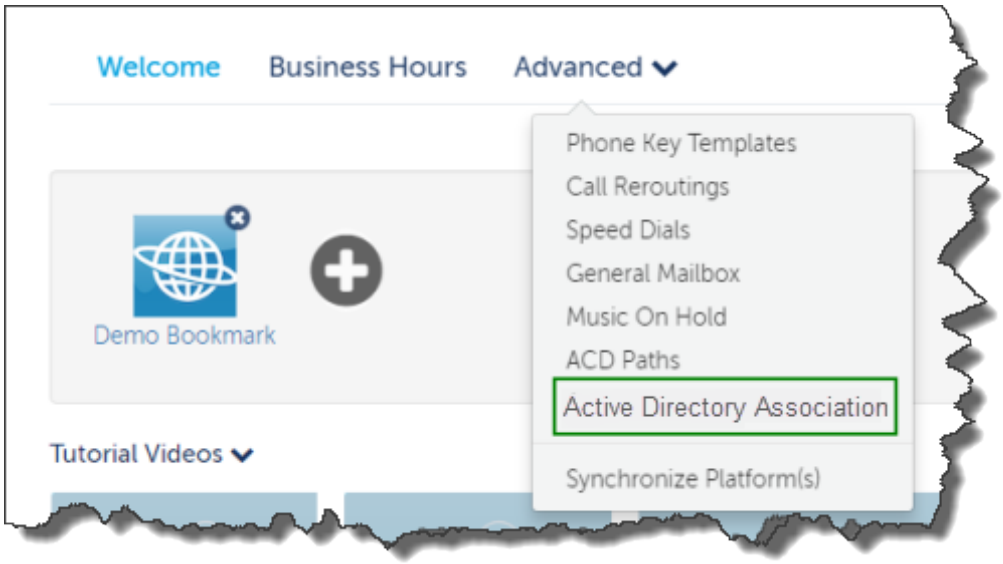
STEP 1 LOG IN ACTIVE DIRECTORY ASSOCIATION

1 From the Service Provider Portal select **Customers > View Customers**.

2 Select the customer and then click the **Login as customer administrator** icon.



3 From the Customer Administrator Portal, select **Advanced > Active Directory Association**.

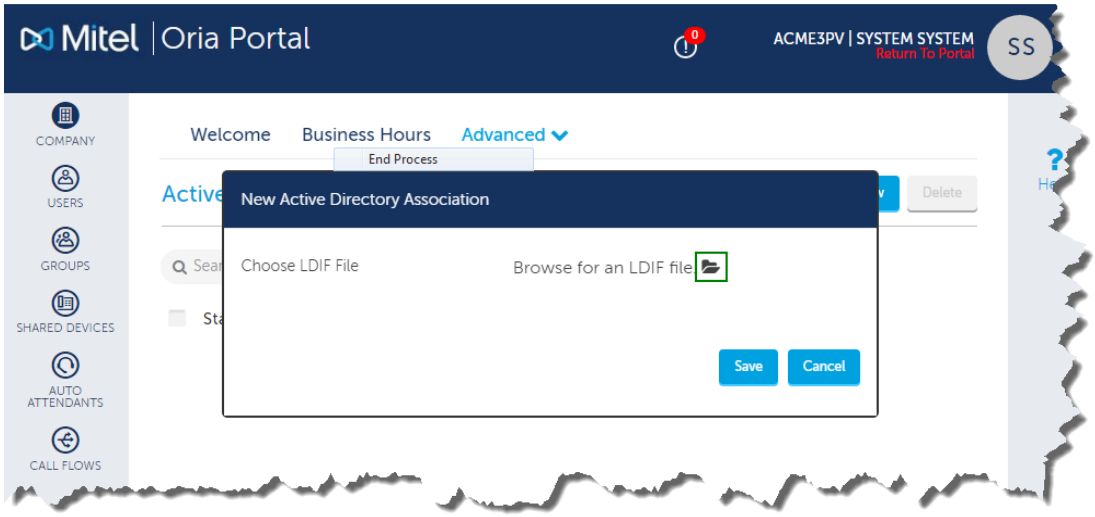


STEP 2 UPLOAD LDIF FILES

4 After you select **Active Directory Association**, you are taken to the **Active Directory Association** page.

5 Click **Add New**. The New Active Directory Association upload dialog box appears.

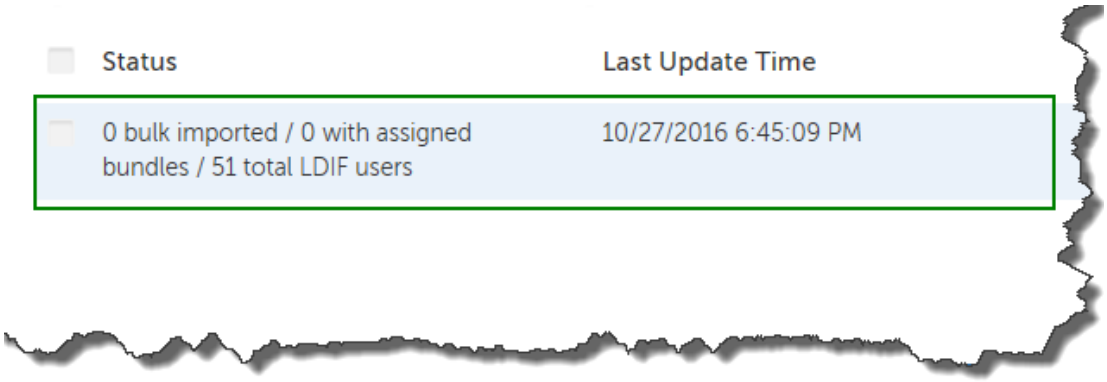
6 Click the folder icon to upload the .ldif file. After you select the file, it appears in the dialog box.



7 Click **Save**.

8 The uploaded file displays the following information:

- The number of users that have been Bulk Imported into Oria.
- The number of users that have bundles assigned to them.
- The total number of users in the .ldif file.



9 Select and click the file to open it. If you want to delete the uploaded file, select the file and then click **Delete**.

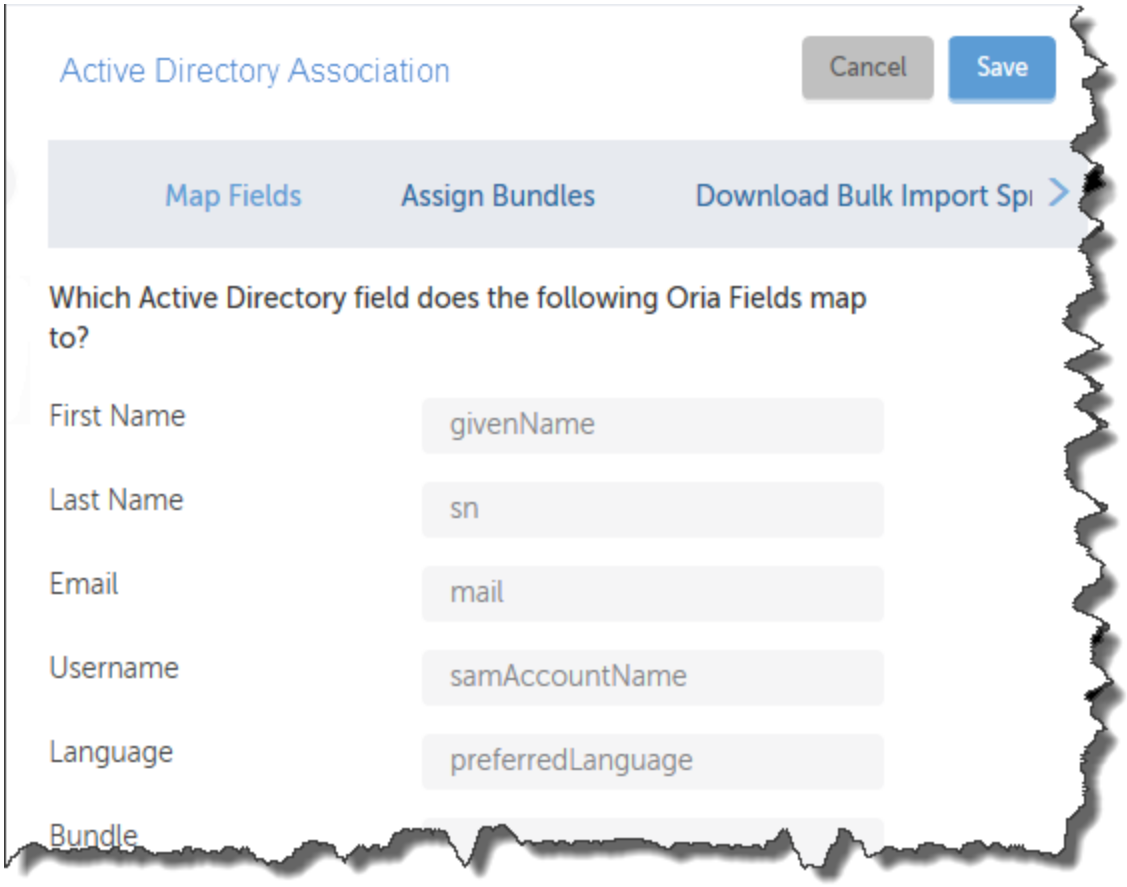
STEP 3 MAP THE FIELDS

Take the following information into consideration before performing the field mappings between Oria and AD. To map the Oria field names (see below) between AD to Oria, the same value must reside on Oria. The more fields you can map the less work is needed in the Bulk Import Spreadsheet.

Oria Field Names

Site, Dialing Privileges, DID, Prime Phone CPN, Prime Phone Key Template, Prime Phone Device Type, Prime Phone Emergency Location, Second Phone Emergency Location, Third Phone Emergency Location, Fourth Phone Emergency Location.

10 After you open the .ldif file, you can perform the mappings.



11 Some default mappings are filled in for you. You can edit these mappings.

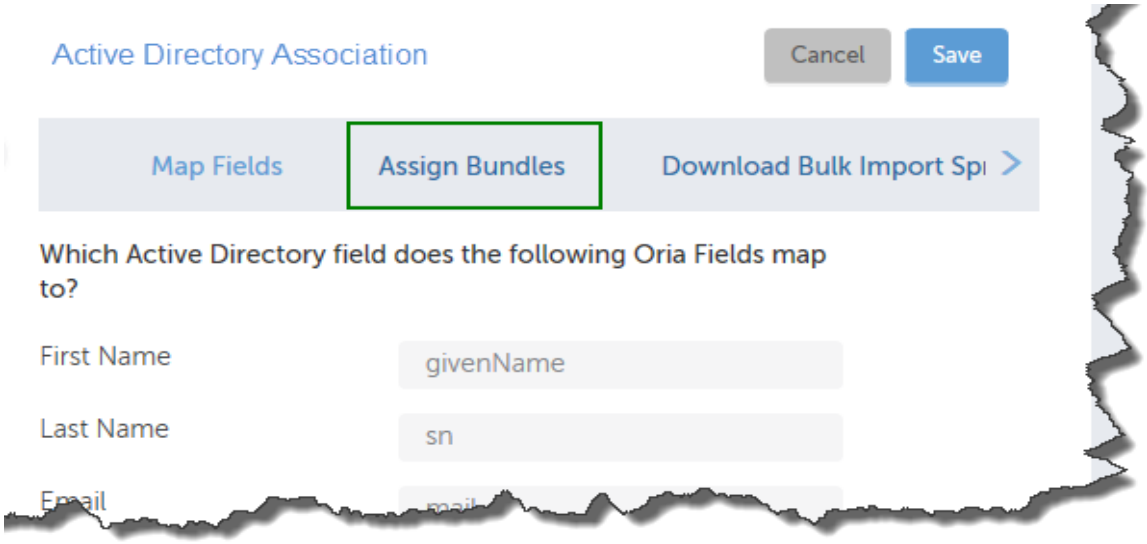
12 Enter the **Active Directory** attributes into the empty fields on the right. The attributes you enter in the fields map to the corresponding Oria attribute on the left.

13 After all the fields are mapped, click **Save**. All mappings are saved so that you can return to the .ldif file later if needed. Oria will take you to the main page in AD. To continue working on the mapping, click the imported .ldif file again.

STEP 4 ASSIGN BUNDLES

After you've completed mapping the fields, assign bundles to users.

14 In the **Map Field** form, click the **Assign Bundles** tab. The **Assign Bundles** form displays a **Search** feature and lists all the users in the '.ldif' file.

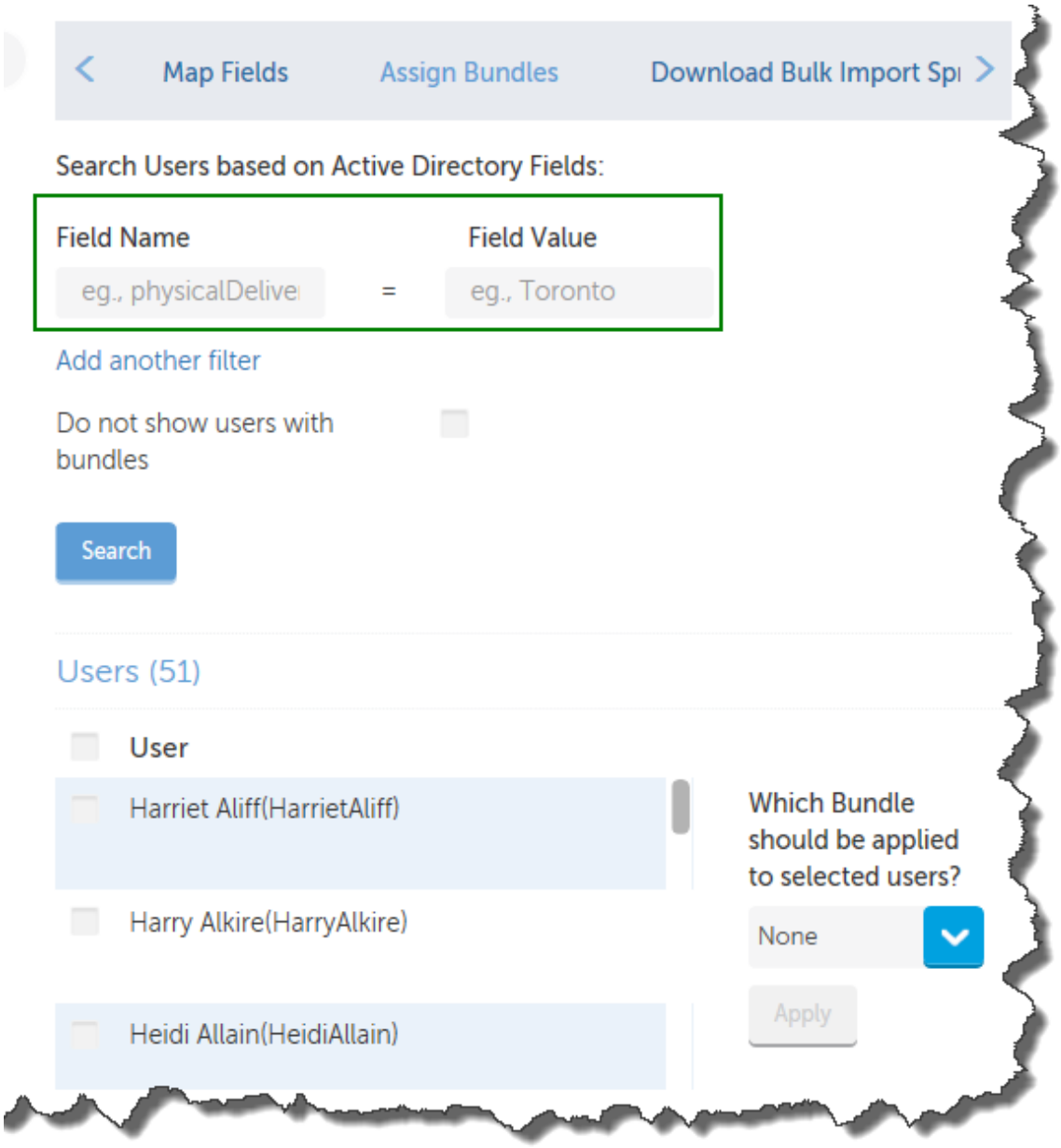


15 To perform a search do the following:

a Enter in the **Active Directory** attribute in the **Field Name** box.

Note: You must enter the attribute correctly, no wildcards are accepted.

b In the **Field Value** box, enter in the criterion you want to search on. You must enter the values correctly or your search results may differ. No wildcards are accepted.



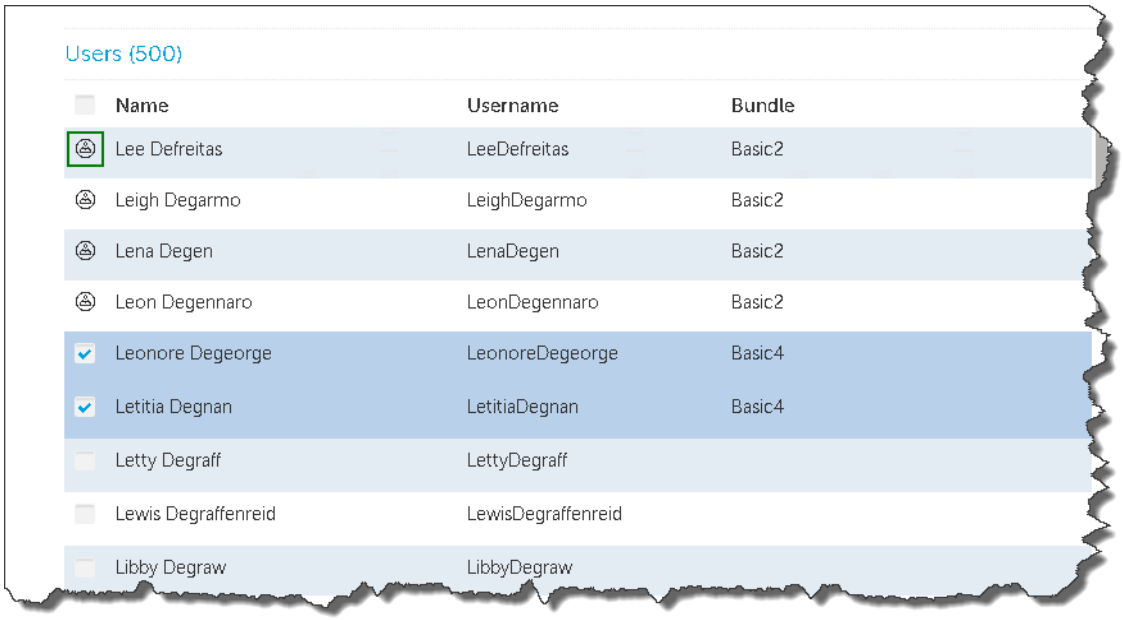
c Click **Search**. The user list is updated to matching the search criterion.

d To add several search criterion, click **Add another filter**.

e To remove values to search on, click the Garbage Can icon next to Field Value and then click **Search** again. This will update your user list.

16 After you have the list of users, assign them a bundle as follows:

a First select the users in the list you what to assign a bundle to, then from the drop down list of bundles, select a bundle. The icon (shown below) beside the user name indicates that the user has already been imported into Oria.



b Click **Apply**. The bundle name appears in the bundle column.

c If you want to search for more users to apply a bundle to, but don't want existing users that have a bundle to appear in the list, select the option **Do not show users with bundles** and click **Search**. This step removes all users from the list that both meet your search criterion and have a bundle already assigned to them.

d If you what to remove a bundle from a user, select the user and from the bundle drop down list select **None**. This will remove the bundle from the user.

17 After you have assigned bundles to the list of users, click **Save** to save all of your work and return to the **Active Directory** page or continue to work.

STEP 5 DOWNLOAD THE BULK IMPORT SPREADSHEET

This form displays all of the users that have been assigned a bundle.

18 Click **Download Bulk Import Spreadsheet** to download a Bulk Import Excel Spreadsheet.

19 If you need to make any changes to the bundle assignments, click **Map Fields** or **Assign Bundles** and perform the changes.

STEP 6 IMPORT THE SPREADSHEET BACK INTO THE PORTAL

After you complete the Bulk Import spreadsheet, return to Service Provider Portal and perform a Bulk Import. See Bulk Import Users for details.

MAPPING EXAMPLES

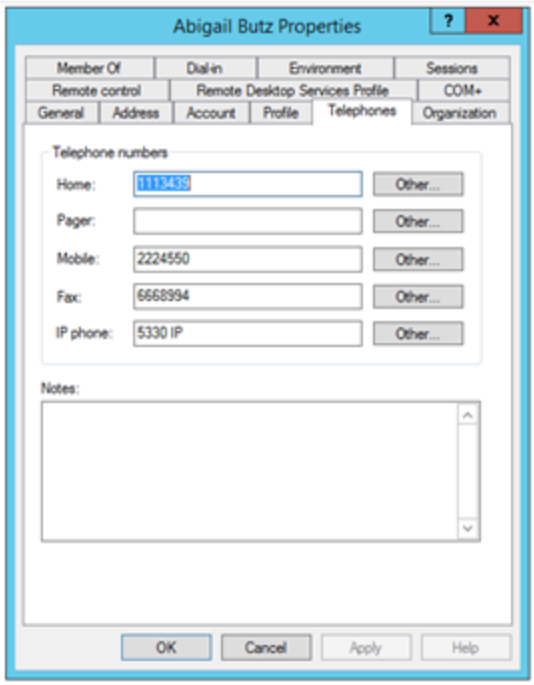
Here are two examples of AD mapping; Site and Prime Phone Device Type.

EXAMPLE 1: MAPPING A SITE

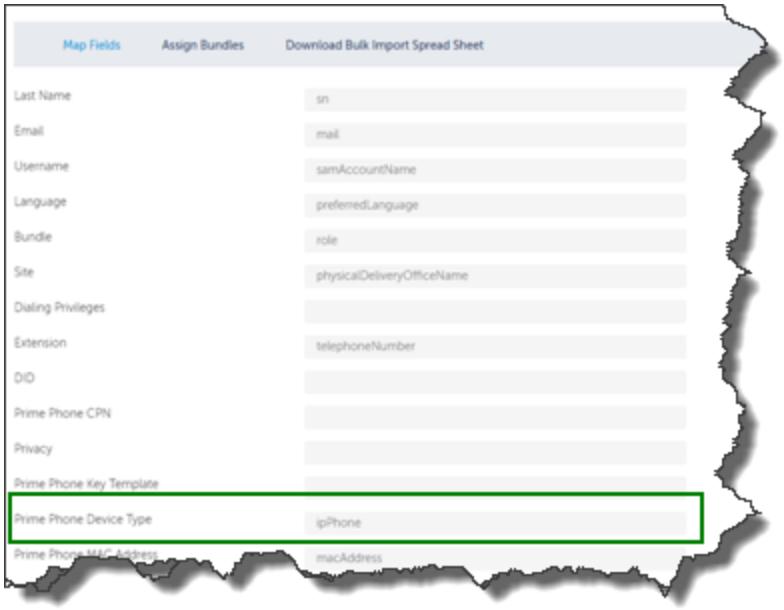
- Below is a list of sites that where created by the Service Provider in Oria for a customer. The sites are called Ottawa, Nepean.
- In Active Directory the City location attribute for a user has the same name as the Site name in Oria, they are both called Ottawa.
- On the “Map Fields” form the default mapping for “Site” is ‘‘physicalDeliveryOfficeName” attribute in Active Directory.
- If we look at the user’s information in Active Directory, the attribute ‘‘physicalDeliveryOfficeName” or Office, is called “Kanata Mitel”.
- If you were to keep the current mappings, when you open the “Bulk Import Spread Sheet” the Site location would be empty. This is because Oria does not have a Site called “Kanata Mitel”.
- If the current mappings for a filed do not produce the correct output, the field will remain empty in the “Bulk Import Spread Sheet”.
- We need to change the mappings in the Active Directory Association “Map Fields” form.
- Change the “Site” attribute from ‘‘physicalDeliveryOfficeName” to ‘l’ which is the “Active Directory” attribute for “City”.
- This will ensure that all users in “Active Directory” that are in the City of Ottawa or Nepean will be Mapped to the Sites of Ottawa or Nepean in Oria.

EXAMPLE 2: PRIME PHONE DEVICE TYPE

- To map a Prime Phone Device Type, the device type in Active Directory must be a Mitel supported device. See Supported Phone Sets for details.
- Active Directory has an attribute called **ipPhone**. The user information below shows that they have an IP phone with the value of 5330 IP. This is a supported Mitel device.



- On the **Map Fields** page, enter the **Active Directory** attribute **ipPhone**.



- When you open the Bulk Import Spreadsheet it will show all of the users that have a supported Mitel device.
- If the device is not a supported device, the field will be empty and you will be required to select one.

ADMINISTER

Here are the admin activities an Oria Administrator can perform:

- Resend the Welcome email
- Reset passwords
- Add a user
- Delete a user
- Generate billing reports
- Choose a license model
- Choose the license counts to report
- Schedule billing reports
- Restart the Billing Scheduler
- Download billing reports
- Specify a Billing Number For a Site
- Turn off license reporting
- Manually enter licensing information
- Enable Billing Change Notification
- Add MiCollab services to existing customers

RESEND THE WELCOME EMAIL

The Resend Welcome Email option is available for single and multi-user selection. Portal and MiCollab passwords are reset to system generated passwords when you resend the Welcome email.

To resend the Welcome email:

1 From the Customer Administrator portal, click the Users tab and select the recipient for the email message.

2 In the Select an Action list, click Resend Welcome Mail.

A service provider can also create and assign other email templates, for example, important notifications such as password updates, voicemail updates and so on. Any email template created and assigned to a Customer is accessible from the Users tab. See “Create Custom Email Templates” on page 59.

RESET PASSWORDS

The Oria server generates a new password and sends an email to the user with the new password. The Customer Admin can reset the passwords from the Customer Admin portal under Users.

Oria can reset following types user passwords:

- MiCollab password

- Portal password
- Phone PIN
- SIP password
- Voicemail password

If you select SIP Password and you have more than one SIP capability (for example MBG SIP and SIP softphone) Oria will reset and send both passwords.

Single user selection

Selecting a single user generates a new user password for the portal. Other passwords are also generated and sent depending one the bundle assigned to the user.

Multiple user selection

Selecting multiple users generates a new password for the portal only. Because the other passwords depend on bundles assigned to users, you must select one user at a time to reset other passwords. You can select a maximum of 25 users at a time.

To reset passwords:

1 From the Customer Administrator portal, click the Users tab and select one or more users.

2 In the Select an Action list, click **Reset Password**.

3 Select the type of password(s) to reset.

4 Click **Reset Password & Send Email**.

ADD A USER

1 From the Customer Administrator portal, click the **Users** tab.

2 Click **Add New**.

User Profile

3 Enter the User details. Fields marked with an asterisk (*) are required. Enter a minimum of 4 characters for the username.

4 Click **Next**.

Service Plan

5 Click Select to choose a phone plan for the User. The chosen plan will be highlighted and Selected will display.

6 Click **Next**.

Service Programming

7 Select the service details for the User. Fields marked with an asterisk (*) are required.

> **Notes:** When you create an ACD Hotdesk user with a softphone, a shared device is automatically created for the user.

> If you select a basic plan that does not include voicemail, you can still forward calls to voicemail (Call Handling Rules) however the calls will go to your corporate voicemail.

8 Click **Next**.

Phones

9 From the **Phone Type** list, select the type of phone for this User.

10 From the **Emergency Response Location** list, select the location to which emergency call will be sent.

11 (Optional): From the Select a predefined key template to be applied to this phone drop-down list, choose a key template for the primary phone. Phone key templates apply to the primary phone only.

12 (Optional): Enter the MAC Address of the phone.

13 Click **Next**.

Phone Keys(optional)

When you choose a MiNet phone type, a step is added to allow you to program the phone keys. You can also edit the Prime phone key and specify the Ring type on all phones that allow key programming.

14 When you select a MiNet Phone type for example the 5330e IP, you can program the phone keys as follows:

- **a** Click a key on the phone diagram.
- **b** Select what should happen when a phone user presses the key.
- **c** Click **OK**.
- **d** Repeat steps a to c to program other keys.
- **e** Click **Save**.

Advanced

15 Select the call handling rules.

16 Click **Save**.

DELETE A USER

Deleting a user's account is quick using the action list. The Delete User action permanently removes the user's profile and access to the Oria portal. You can delete one user at a time only.

To delete a user:

1 From the Customer Administrator portal, click the Users tab and select one or more users.

2 In the Select an Action list, click Delete User.

3 Click Delete.

GENERATE BILLING REPORTS

Billing reports simply the workflow for service providers when they need to provide billing summaries to Mitel.

SERVICE PROVIDER SUBSCRIPTION USAGE REPORT

You can generate subscription reports and system reports from the Oria portal. The Service Provider Subscription Usage Report is an .xls formatted subscription report for the system. The report contains a summary of the licenses in use and the counts manually entered in the editable fields. The subscription usage report is only available for service providers and includes monthly subscription usage for:

- MiCloud Business
- MiCloud Contact Center
- Premium Software Assurance (optional)
- MiCloud Business Move2Cloud (optional)

OPTIONAL LICENSE COUNTS FOR PREMIUM SOFTWARE ASSURANCE AND MOVE2CLOUD

The optional license counts for Premium Software Assurance and Move2Cloud are derived from the number of Core UCC license types that the service provider has in use.

Premium Software Assurance

When the Premium Software Assurance option is enabled, the system reports indicate a Premium Software Assurance license equal to the actual number of each of the Core UCC license types. For example, if a service provider has 250 Entry UCC licenses in use, there will be 250 Premium Software Assurance Entry UCC licenses reported. If Premium Software Assurance is disabled, the license count for each Premium Software Assurance license type is 0.

Move2Cloud and Core UCC Licenses

You can manually enter the number of UCC licenses to include in Mitel's Move2Cloud promotion. The license counts for the Move2Cloud promotion are included in the system level .xls and .xml reports. To prevent double counts, the Move2Cloud licenses are subtracted from the Core UCC license counts when they are reported. So the number of Move2Cloud licenses for a given type cannot exceed the corresponding number of Core UCC licenses.

For example, Oria calculates that you are using 500 Standard IPT licenses. If you want 300 under the Move2Cloud promotion, enter 300 for the license count field for Move2Cloud Standard IPT field. Oria will report 200 Standard IPT licenses for UCC core and 300 Move2Cloud Standard IPT licenses.

SYSTEM BILLING REPORT

The Service Provider Billing Report is an .xml formatted report that contains a summary of the system licenses in use. The license counts are derived from the Oria database and manually entered values.

CUSTOMER VSP AND VAR ALLOCATION AND USAGE REPORTS

A report that provides a billing summary for Customers, Virtual Service Providers (VSP), and Value Added Resellers (VAR). It contains Customer details and a summary of their bundle allocation and usage. The billing information is downloadable in .xml format for use in a compatible billing system.

BUNDLES ALLOCATED

The portal tracks how many bundles each customer has been allocated, and of those, how many bundles are currently being used. To view the bundle usage information, follow the steps listed below.

To view how many bundles a customer is using:

1 Click the **Customers** tab.

2 Select the customer profile.

3 In the customer's popup there is a list of the bundles allocated and used by the customer.

CHOOSE THE LICENSE MODEL

Choose either the operating expenditure (OPEX) or capital expenditure (CAPEX) license model.

To choose the license model for reporting

1 Click **Customers > Billing**.

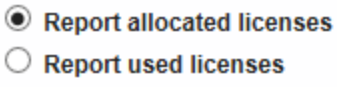
2 Click**Configure**.

3 Select **Opex** or **Capex**.

4 Click **Save**.

CHOOSE THE LICENSE COUNTS TO REPORT

You can select the type of license counts to include in billing reports.



To choose the type of license counts to report

1 Click **Customers > Billing**.

2 Click **Configure**.

3 Select **Report allocated licenses** or **Report use licenses**.

4 Click **Save**.

SCHEDULE BILLING REPORTS

Schedule billing reports to run at specific intervals so that they are ready when you need them. After a report is run, it is available in the Download Reports tab.

To schedule a billing report

1 Click **Customers > Billing > Configure**.

2 Click **Enable Scheduled Reporting**.

3 Choose the frequency, day, and start time for generating the reports.

4 Click **Save**.

RESTART THE BILLING SCHEDULER

You can restart the billing scheduler in two ways; reconfigure the schedule for a new time or interval or restart the scheduler through a maintenance command.

Issue this maintenance command to restart the billing scheduler using the current configuration:

```
$$RESTART_BILLING_SCHEDULER$$
```

Note: If this command is run and scheduling is not enabled, the command has no effect. You may want to use this maintenance command when the server time changes for some reason (for example, daylight savings time)

DOWNLOAD BILLING REPORTS

You can download generated billing reports at any time.

1 Click **Customers > Billing** and then click the **Download Reports** tab.

2 Click the report to download it.

SPECIFY A BILLING NUMBER FOR A SITE

If you have multiple sites with separate billing, you can specify a billing number on a per-site basis. After you add the site billing number, it is included in billing and licensing reports.

To specify a billing number for a site

1 Click **Platforms > Platform Groups**.

2 Select the platform group and click **Edit**.

3 Click the **Sites** tab.

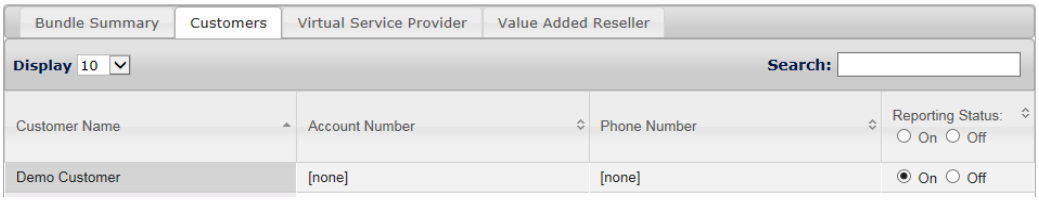
4 Click the **Edit** icon for the site you want to add the billing number.

5 In the **Site ID** field, enter a number to identify the site in billing reports.

6 Click **Save**.

TURN OFF LICENSE REPORTING

Turn license reporting on or off through the Customers tab in Billing.



To turn off license reporting for a customer

1 Click **Customers > Billing** and then click the **Customers** tab.

2 In the table, find the customer, go to the **Reporting Status** column and select **On** or **Off**.

3 Click **Save**.

MANUALLY ENTER LICENSE INFORMATION

You can manually enter the license counts that Oria does not automatically calculate in the Oria portal. The license counts that Oria does calculate from its database appear as read-only fields in the License Information page. Any counts that are manually entered in the editable fields are also stored in the Oria database.

To manually enter licensing information:

1 Select **Customers > Billing**.

2 Click the **Edit Licensing** link.

3 Edit the corresponding licenses and click **Save**.

ENABLE BILLING CHANGE NOTIFICATION

Billing change notification settings are available for Service Provider Administrators who hold Advanced privileges in the Service Provider Portal. The Billing Change Notification feature displays a warning message to Customer Administrators when the action they are about to take changes the Service Agreement with the Service Provider and increases billing. Billing change notification settings include a customizable default message.

When you create a new customer, billing change notification is disabled by default. When an existing customer is upgraded to Oria 5.2 and later, billing change notification is enabled by default.

Billing change notification is available for the following actions:

- Create a user

- Change a user bundle
- Create a group
- Create an auto attendant or auto attendant action
- Create a call flow
- Create a general mailbox

To set billing change notification

1 Click **System > Advanced** and then click the **Billing Change Notification** tab.

2 Select the actions you want billing notification for.

3 Customize the billing notification message:

   a Select the language for the message.

   b Customize the message.

   c Repeat **a.** and **b.** for any other language.

4 Click **Save**.

To change billing notification for a customer

1 From the **Customers** tab, click **View Customers**.

2 Select the customer and click the **Edit** icon.

3 Click the **Service Bundles** tab.

4 Under **Billing Change Notification**, select or deselect **Customer must confirm any changes that will affect their billing**.

ADD MICOLLAB SERVICES TO EXISTING CUSTOMERS

Perform the following operations to upgrade an exiting customer to MiCollab Client:

1 Add MiCollab Client to the Platform.

2 Create a bundle that includes MiCollab Client.

3 Assign the MiCollab Client bundle to the customer.

4 Assign the MiCollab Client bundle to users.

ADD A RESILIENT MIVOICE BUSINESS INSTANCE TO AN EXISTING PLATFORM GROUP

If you set up a customer on a single MiVoice Business instance, you can add another MiVoice Business instance to the platform group later to make it resilient. When you add a MiVoice Business instance to an existing platform group, all users are automatically configured into the new resilient MiVoice Business instance.

SCHEDULED MAINTENANCE DURING MIVOICE BUSINESS RESILIENCY SETUP

Do not execute and disable any scheduled maintenance on the MiVoice Business when you run the MiVoice Business Resiliency option in Oria. For example, if the DBMS CHECK command starts to execute during that time, it will lock the MiVoice Business instance and cause errors in updating users. If you encounter errors, you may try the operation again. This second try only updates those users that failed the first time. If you would like to set all users' resiliency values again, instead of only those that failed, then delete the task from the background task results list and run the Resiliency option again.

To add a resilient MiVoice Business instance

1 Log out any Hotdesk users before adding a resilient MiVoice Business.

2 From the **Platforms** tab, click **Platform Groups**.

3 Select the customer and then click the **Edit** icon.

4 Click the **Sites** tab.

5 Do the following:

- Click the **Edit** icon for the site that you want to apply resiliency.
- Click the **MiVoice Business** tab.
- Select the resilient MiVoice Business.

6 Click **Save**.

All user devices on the primary MiVoice Business instance are updated with the new resilient MiVoice Business instance. The customer is locked from making changes during this time.

To remove a resilient MiVoice Business

1 From the **Platforms** tab, click **Platform Groups**.

2 Select the platform group and then click the **Edit** icon.

3 Click the **Sites** tab.

4 Click the **Edit** icon next to the customer site that contains the resilient MiVoice Business instance.

5 Click the **Mivoice Business** tab.

6 In the **Resilient MiVoice Business** drop-down list, select **No Resilient MiVoice Business**.

Note: All user devices on the primary MiVoice Business instance are updated when MiVoice Business resiliency is removed. The customer is locked from making changes during this time.

7 Click **Save**.

MAINTAIN

Here are the maintenance activities that need to take place on a regular basis:

BACK UP AND RESTORE THE ORIA DATABASE

There are two backup methods available to back up the Oria database, depending on your needs:

- MSL backup
- Oria backup

Both offer complete backups but the MSL Backup offers the advantage of automated scheduled backups. The Oria Backup method is useful for software migrations and when a database needs to be sent to Mitel support.

> **CAUTION:** The above backup methods are not compatible with each other. An MSL Backup can only be restored using the MSL Restore capability. An Oria Backup can only be restored using the Oria database restore capability.

MSL BACKUP AND RESTORE

An MSL backup is a complete representation of an MSL server at the time of backup. It includes MSL and the application databases. It does not include any of the software application blades installed on MSL. This means that if a new system needs to be restored, MSL, the backup-file, and the Oria Blade will need to be installed. An MSL backup may be restored to an existing system without reinstalling MSL or Oria (restoring a database that originated or a greater version of Oria than the restore target will result in system failure).

To schedule automatic MSL backups:

Scheduled MSL backups use the network file server option from with the MSL Server Manager.

> **Note:** This procedure also backs up all application data through the MSL backup feature. Performing a separate backup of the Oria database may not be necessary, depending on local administration/maintenance protocols.

1 Log in to the MSL Server Manager using a supported browser with the user name and password when initially configuring the MSL server.

2 Under Administration, click **Backup**.

3 From the Select an action drop-down list, click **Configure network backup**.

> **Note:** Selecting the Backup to Desktop option will back up the data to the local workstation. Scheduled backups cannot be performed with this option.

4 Click **Perform**.

5 In the **Backup Server Configuration** area, configure the server where the backup file will be stored:

- In the IP Address field, enter the IP address of the file server where the backup will be stored.

- In the **Sharename** field, enter the name of the shared folder where the backup file will be stored. (For example, "Backups".) The shared folder must have permissions set to "Full Control".
- In the **Username** field, enter the username to use when connecting to the backup server.
- In the **Domain or Workgroup Name** field, enter the domain or workgroup name of the server. (For example, mitel.com.)
- In the **Password** field, enter the password to use when connecting to the backup server. Available storage space is displayed.

6 In the **Maximum number of backup files to keep** field, enter the maximum number of backup files to keep (1-999) on the server (default is 5). When the number of stored files reaches this maximum count, the oldest version is deleted.

7 In the **Backup Schedule** area, select the frequency with which to perform backups (Daily, Weekly, Monthly, Never). Backup file names will include timestamps in the format: mslserver_<hostname>_yyyy-mm-dd_hh-mm.tgz)

- For Daily backups, select a time of day (hour, minute, AM/PM)
- For Weekly backups, select a time of day, and day of the week
- For Monthly backups, select a time of day, and day of the month
- To disable regularly scheduled backups, click Disabled.

8 To test the backup configuration, or to run an immediate backup, click **Backup Now**.

9 Click **Save** to save the schedule information.

See the *Mitel Standard Linux Installation and Administration Guide* for additional information.

RESTORE THE ORIA DATABASE FROM AN MSL BACKUP

You need the following information and equipment to restore a database:

- Installer PC
- MSL system IP address
- MSL Server Manager username and password

There are two methods for restoring the Oria database from an MSL backup:

- Use the "Restore" option when re-installing MSL.
- Use the Command Line Interface by logging in to the MSL Server Console and select the "Restore from backup" option. See the Mitel Standard Linux Installation and Administration Guide for details.

CAUTION: You must restart the Oria application after restoring a database. Service will be LOST during this reboot.

UPGRADE THE ORIA SOFTWARE

Follow these steps to upgrade from a minimum of Oria 4.0.275 to Oria 5.3. Make sure that you upgrade from the latest Oria 4.0 support build. Contact product support for the latest patch release. See the latest release notes for details.

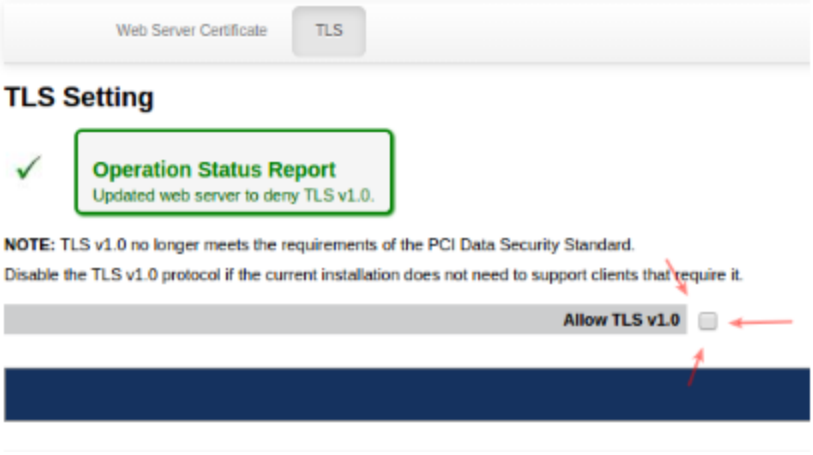
If you are upgrading from an earlier release of Oria, for example Oria 3.0, contact Mitel Professional Services for assistance.

Note: If you are using system speed call, you must migrate to DID services using the Oria migration outlined in Oria 4.0 before migrating to Oria 5.3.

Important: TLS 1.0 has been found to be vulnerable to a number of security attacks. As such, Oria 5.3 disables support for TLS 1.0 by default. Mitel does not recommend using TLS v1.0. However, should you need to enable support for TLS v1.0, login to the MSL server manager for the server at:

[http://<address]http://<address of Oria server>/server-manager,

go to **Security > Web Server > TLS** and select **Allow TLS v1.0**.



UPGRADE ON A PHYSICAL SERVER (ORIA 5.0 OR 5.1 OR 5.2 TO ORIA 5.3)

Note: After an upgrade, all Oria history is removed. For example, Active Directory and Bulk Import history.

Step 1 Prepare for the upgrade

1 Order an Oria license.

2 Make sure that the Oria server has Internet access to perform a DNS lookup and for access to port 22 of Mitel AMC.

3 Test access to AMC:

- **a** ssh to the Oria server and login at root level using the same password as admin.
- **b** Ping sync.mitel-amc.com and register.mitel-amc.com
- **c** If no IP address is resolved, check the DNS.

4 When the Oria license is available in AMC, create a new Oria ARID and apply the license to it.

Step 2 Perform an Oria backup

1 Log into the current Oria server using Server Manager.

2 Perform a backup to the desktop.

3 In the **Status** panel, register the server with the ARID created earlier.

Step 3 Upgrade the MSL blade to 10.5 version (see release notes for the latest compatible version)

1 In **Server Manager**, go to the blades **Blades** panel.

2 Upgrade the MSL blade.

3 Clear the report after the upgrade.

4 Reboot server from Reconfigure tab in Server Manager. Wait until the server is restarted.

Step 4 Upgrade Oria

1 In **Server Manager**, go to the blades **Blades** panel.

2 Upgrade the Oria blade. Wait until the upgrade is finished.

3 Clear the report and ensure that there are no more upgrades listed.

4 Update the default Oria password on first access.

UPGRADE ON A PHYSICAL SERVER (ORIA 4.0.275 TO ORIA 5.3)

Step 1 Prepare for the upgrade

1 Order an Oria license.

2 Make sure that the Oria server has Internet access to perform a DNS lookup and for access to port 22 of Mitel AMC.

3 Test access to AMC:

- **a** ssh to the Oria server and login at root level using the same password as admin.
- **b** Ping sync.mitel-amc.com and register.mitel-amc.com
- **c** If no IP address is resolved, check the DNS.

4 When the Oria license is available in AMC, create a new Oria ARID and apply the license to it.

Step 2 Perform an Oria backup

1 Log into the current Oria server using Server Manager.

2 Perform a backup to the desktop.

Step 3 Upgrade the MSL blade to 10.5 version (see release notes for the latest compatible version)

1 Place the CD in the server optical drive.

2 Boot from the appropriate drive, and select the **Upgrade** option during the installation process.

Step 4 Upgrade Oria

1 Place the CD in the optical drive.

2 Login into the Server Manager using a supported browser with the user name 'admin' and the root password you gave when configuring the MSL server. The Server Manager is accessed by entering the following URL:**http://<www.hostname> OR <IP address of the MSL Server>/server-manager**.

3 Click on **Blades**, located in the left-side panel under the ServiceLink heading.

4 Click **Update List** to ensure an up-to-date listing of software blades.

5 Click the **Install** link, located beside the Oria blade name.It may take a few minutes for the software to install.

6 Test the installation:

7 Click on **Oria**, located in the left-side panel under the **Applications** heading.

8 If Oria is not visible, refresh the browser.

9 Click **Launch**, located in the main window.

Step 5 Register the server with the ARID

- In the **Status** panel, register the server with the ARID created earlier.

Step 6 Run the Oria post-upgrade maintenance commands

1 Login to the Oria 5.3 service provider portal (http://a.b.c.d/konos/sp/spLogin.do). Replace a.b.c.d with the Oria server IP address or FQDN.

2 Enter this URL in the same active service provider browser session (https://a.b.c.d/konos/commands.jsp) Replace a.b.c.d with the Oria server IP address or FQDN. This will open up Oria Service Provider maintenance command window.

3 Run the following commands in the Oria Service Provider portal to enable features in the Customer Administrator portal: (run again?)

In the command field, enter the following commands individually and click on Submit after each command. Replace custId1 with the assigned customer WebID in Oria.

- `$$GET BUSINESS HOURS$$ custId1`
- `$$GET SUPERVISED TRANSFER$$ custId1`
- `$$SET FACS$$ custId1`

To issue the commands for multiple customers, run these commands:

- `$$GET BUSINESS HOURS$$ custId1, custId2`
- `$$GET SUPERVISED TRANSFER$$ custId1, custId2`
- `$$SET FACS$$ custId1, custId2`

To apply the commands to all customers in the Oria database, run these commands:

- `$$GET BUSINESS HOURS$$ ALL`
- `$$GET SUPERVISED TRANSFER$$ ALL`
- `$$SET FACS$$ ALL`

Any customer that is using MiVoice Business (MiVB) is upgraded as part of the MiCloud Business 3.1 to MiCloud Business 3.2 upgrade. To update MiVB versions, go to the Oria Service Provider maintenance command window and run the following command:

```
$$UPDATE MCD VERSION$$ CUSTOMER, custId
```

4 See the *Migrate to MiCloud 3.2 Flow Through Provisioning* section if you upgraded from MiCloud Business 3.1 to MiCloud Business 3.2. (applies if upgrading from MiCloud Business 2.0 - include in procedure 2)

UPGRADE ON A VIRTUAL MACHINE

For virtual deployments in a VMware environment, MSL software is packaged with the application software and delivered as an OVA file which can be installed on a vSphere client using the Deploy OVF Template wizard.

Notes: If you are upgrading MiCollab and Oria to MiCloud 2 from a previous version, feature profiles will not automatically be created on MiCollab. To create the feature profiles on MiCollab you must edit and save the customer and Oria will create the Feature Profiles on the MiCollab Client.

Users are not created from the old Standard IPT bundle when you upgrade to Micollab Version 7.1 and up. To be able to add the users, you must manually update the Record ID on MiCollab in the location where IPT licenses are added.

Optionally you can follow the same upgrade process as the physical server upgrade with the following exception:

- Upgrade the MVF blade after the MSL upgrade but before the reboot.

Note: After an upgrade, all Oria history is removed. For example, Active Directory and Bulk Import history.

Step 1 Back up the virtual machine instance

1. In the vSphere client, right-click the virtual appliance name and select Shutdown Guest.
2. Click File > Export > Export OVF Template.
3. Enter the name of the OVF template file and the directory where you want to save it.
4. Select one of the following options:
   - Physical Media (OVA): to export a single .ova file (recommended)
   - Web: exports multiple files
5. Select one of the following Format options:
   - Single File (OVA): to export a single .ova file (recommended)

- Folder of Files (OVF): exports multiple files

6. Click OK. MSL automatically configures the NIC address for the new virtual machine.

Step 2 Perform a full MSL backup

1 Log in as "admin".

2 Access the server console from the server itself or remotely using an SSH client.

3 From the console, select the option to Perform backup.

4 Select a destination to store the backup, for example, your desktop or local network file server.

5 If backing up to a local network file server do the following:

- Enter the IP address of the file server where the backup will be stored.
- Enter the domain or workgroup name of the server. For example, mitel.com.
- Enter the name of the shared folder where the backup file will be stored. (For example, "Backups".) The shared folder must have permissions set to "Full Control".
- Enter the Optional Directory Path where the backup will be stored. If you leave this field blank, the file will be stored at the root of the shared folder.
- Enter the username to use when connecting to the backup server.Enter the password to use when connecting to the backup server. Estimated backup size and available storage space are displayed.

6 Click **Proceed**.When the backup is complete, file verification is performed automatically.

7 Click **Continue**.

Step 3 Deploy the Oria Virtual Appliance

The .ova file you downloaded from Mitel OnLine contains the MSL operating system, the application software, and VMware Tools (a suite of utilities to enhance performance).

1 Launch the vSphere Client on the network PC:

- Click **Start > All Programs**.
- Click **VMware > VMware vSphere Client**.
- Enter the IP address or hostname of the Hypervisor ESX/ESXi Host server OR enter the IP address or hostname of the vCenter Server.
- Enter your username and password.
- Click **OK**.

2 In the vSphere Client application, click **File > Deploy OVF Template**. (The .ova file you downloaded is a template file in OVF format.)

3 In the **Deploy OVF Template** screen, specify the storage location of the .ova file you downloaded.

4 Specify the Source Location for the OVF template file (.ova file extension):

- To deploy from a file on the local PC or from a network share, click Browse and navigate to the file.

- To deploy from a URL (if the file is on the Internet or is accessible through a web browser) enter the URL of the file location.

5 Click **Next**. The OVF Template Details screen appears. The information shown is derived from the .ova file to provide a "check" for correct application and version. Note that the Download size is only an estimate until a deployment configuration is selected later in the process.

6 Click **Next**.

7 Click **Accept** to accept the end-user license agreement, and then click **Next**.

8 Enter a meaningful name for the virtual appliance, or accept the default name, and then click **Next**.

9 Click **Next**. The following three steps are dependent on your configuration.

- If you are using the optional vCenter Server, select the appropriate Host/Cluster for this deployment and then click **Next**.
- If you are using the optional vCenter Server, select the appropriate Resource Pool for this deployment and then click **Next**.
- If multiple Datastores are available, select the Datastore for the vNuPoint instance, and then click Next.

10 In the **Disk Format** screen, select **Thick provision Lazy Zeroed**.

11 Click **Next**.

12 Configure the network mapping. (This screen is only displayed if the network defined in the OVF template does not match the name of the template on the host to which you are deploying the virtual application.) If required, contact your Data Center administrator for more details on which Network Mapping to use. The required settings are:

- Application: Select **Restore from backup**.
- LAN: Enter the IP Address, LAN Netmask, and Default Gateway Address.

> **Note:** If you want to use the IP Address of your existing Oria server, ensure that it is shut down. If not, the new updated Oria server will detect an IP conflict, and disable its network interface, until the original Oria server is off the network.

13 Click **Next**. The Deploy OVF Template Ready to Complete screen appears.

14 Review the information and then click **Finish**.

15 When deployment is complete, click **Close**. The new virtual machine appears in the inventory list in the left-hand pane.

16 Select the new virtual machine and power up the virtual machine.

17 Open the virtual machine console.

18 When the system prompts you with "Do you wish to restore from backup?", click **Yes**. The MSL console will present 3 choices of Upgrade. **DO NOT** choose "Restore from Running server". Choose one of the other options to retrieve your Oria Backup file, into this new Oria server. After you have restored the Oria MSL Backup, you will be prompted to Reboot. Again, ensure that the original Oria (with the same IP address as this updated Oria), is shutdown before booting up the new restored Oria server.

Note: The Oria Service Provider Portal may not be available immediately after the MSL Server Manager is available. It may take a few minutes for all of the Oria Services to start.

19 Select **Restore from Network Server**.You will be prompted to select a network interface to use for the restore (LAN or WAN), the address and netmask of the local MSL server, the address, gateway and domain name of the backup server, the folder name containing the backup file, and the username and password required to log in to the backup server.

20 Use VSphere, or VCentre to change the virtual machine memory allocation to 8GB.

21 When the restore is complete, select **Reboot**.

Important: If you want to use the IP Address of your existing Oria server, ensure that it is shut down. If not, the new updated Oria server will detect an IP conflict, and disable its network interface, until the original Oria server is off the network.

Step 4 Apply the Oria ARID and sync with the AMC

1 Make sure you have created the Oria ARID on the AMC.

2 Apply the Oria ARID in MSL Server Manager.

3 Synchronize to the AMC.

Step 5 Run the Oria post-upgrade maintenance commands

1 Login to the Oria 5.3 service provider portal (http://a.b.c.d/konos/sp/spLogin.do) <<replace a.b.c.d with the Oria server IP address or FQDN>>

2 Enter this URL in the same active service provider browser session (https://a.b.c.d/konos/commands.jsp) <<replace a.b.c.d with the Oria server IP address or FQDN>> This will open up Oria Service Provider maintenance command window.

3 Run the in the

In the command field, enter the following commands individually and click on Submit after each command. Replace custId1 with the assigned customer WebID in Oria.

- `$$GET BUSINESS HOURS$$ custId1`
- `$$GET SUPERVISED TRANSFER$$ custId1`
- `$$SET FACS$$ custId1`

To issue the commands for multiple customers, run these commands:

- `$$GET BUSINESS HOURS$$ custId1, custId2`
- `$$GET SUPERVISED TRANSFER$$ custId1, custId2`
- `$$SET FACS$$ custId1, custId2`

To apply the commands to all customers in the Oria database, run these commands:

- `$$GET BUSINESS HOURS$$ ALL`
- `$$GET SUPERVISED TRANSFER$$ ALL`
- `$$SET FACS$$ ALL`

4 Follow the steps in *Migrate to MiCloud 3.2 Flow Through Provisioning* if you upgraded from MiCloud Business 2.0 to MiCloud Business 3.2.

MIGRATE TO MICLOUD 3.2 FLOW THROUGH PROVISIONING

Any customer that is using MiVoice Business (MiVB) is upgraded as part of the MiCloud Business 2.0 to MiCloud Business 3.2 upgrade.

Important: After the upgrade you may need to clear your browser cache memory for example, when performing a task such as creating or changing a bundle. To clear your browser cache do one of the following:

1 (preferred) Force reload the page (usually by pressing: CTRL + F5)

2 Clear browser cache

3 Reboot Oria

To update MiVB versions, go to the Oria Service Provider maintenance command window and run the following command:

```
$$UPDATE MCD VERSION$$ CUSTOMER custId
```

If you upgraded the platforms from MiCloud 2.0 to a MiCloud 3.2, run ONE of the following commands:

Note: Make sure that you run the command BEFORE switching the configuration from FQDN to IP (The FDQN is used to also update any MiVB references in corresponding MBGs). If the FQDN is changed before running the command, the administrator will have to go directly into the MBGs and change the MiVB reference from FQDN to IP.

NAT: Run the following maintenance command for moving from an FQDN to an IP address which is required with MiCloud 3.2 flow through provisioning.

- `$$UPDATE MCD CUSTOMER HOST NAME$$ <Management Host Name IP Address>, <New Customer Host Name>`

For example:

```
$$UPDATE MCD CUSTOMER HOST NAME$$ mmg.fqdn1.public.com, 192.168.20.1
```

non-NAT mode: Change the Host Name from FQDN to an IP address. In non-MMG, there is no Management and Customer Host Names, just one Host Name for the MiVB configuration (in MiVoice Business tab in the Platform Groups UI).

Use this maintenance command to change the Host Name from FQDN to an IP address:

- `$$UPDATE MCD HOST NAME$$ <Existing Host Name FQDN/IP Address>, <New Host Name>`

For example:

```
$$UPDATE MCD HOST NAME$$ fqdn1.com, 10.168.20.1
```

Verify that the command was successful by viewing the MiVoice Business tab in Platform Groups for the corresponding MiCollab platform.