



# Avaya Cloud Office Onboarding

## End User Training





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# Overview

The end user training session is open to all employees within an organization. This Training will review how users can activate their Avaya Cloud Office accounts, use the Avaya Cloud Office desk phones and applications for daily business communications, and customize their personal extension settings.

# Introduction

The Avaya Cloud Office applications help empower employees to work together more effectively, whether they're sitting around the corner or around the globe from each another. Avaya Cloud Office includes a complete, cloud-based voice, Business SMS, fax, web and HD video conferencing solutions, as well as a unified project management tool, all accessible from mobile and desktop devices.

In this training, we will introduce the Avaya Cloud Office system and applications including:

- Activating and accessing your Avaya Cloud Office Online Account.
- Using a physical desk phone on the Avaya Cloud Office system.
- How to use the Avaya Cloud Office applications for daily business communication.

## What is Avaya Cloud Office?

Avaya Cloud Office uses the power of the cloud to consolidate:

- Cloud Private Branch Exchange (PBX)
- Audio/web/Video Meetings
- Group Messaging and Team Collaboration

All of those features are consolidated into a single, cloud-based solution which keeps users and administrators in a single ecosystem, giving them a single vendor to use and manage for their communications.

Up to 32 days a year are wasted by 69% of workers navigating between applications. Avaya Cloud Office's mission is to simplify business communications and the number of applications employees use on a daily basis. Today we will be reviewing the Avaya Cloud Office solution and how you can take advantage of a single communications platform.

# Activating Your Avaya Cloud Office Extension

## Overview

After you have been added to the Avaya Cloud Office business phone system, you will receive an email welcoming you, and an activation link to follow to set up your account.

In this section, we will walk through this Welcome email and activation process.

## Welcome Email

An activation email will be sent to your email address with the subject – “You have been added to your company’s Avaya Cloud Office business phone system.” From this email, you will see the number and extension assigned to you, and a button to **Set Up Account**. You can click this button directly or copy the link provided into a browser window to initiate the setup.

You will need to create a password, PIN, and security question and answer for your account. Follow the on-screen prompts. After completing this step, you will be taken to the **Express Setup**.

# Activating Your Avaya Cloud Office Extension

(continued)

## Express Setup

After you activate your account, Avaya Cloud Office starts the Express Setup process, which quickly guides you through the process of setting up your new phone system. You will have the option to quickly update the following options:

**User Info** — Confirm your User Details.

### **Call Handling**

*Call Forwarding* - Add a forwarding number for your business calls to reach if you are unable to answer your main phone on time.

### **Messaging**

*Voicemail* — Set up a custom voicemail greeting or keep the default greeting.

Once you finish the **Express Setup**, you will have the option to download the Avaya Cloud Office applications then go to your personal online account to view your extension settings.

# Calling from Anywhere



## What type of phone devices do you use? Discussion

- How do you make and receive calls today (using a physical desk phone or a phone through your computer or mobile device)?
- Do you take business calls outside of the office?

## Overview

Once your Avaya Cloud Office account is activated, you will be able to make and receive calls from your chosen phone. Currently, there are three types of phones you can use with Avaya Cloud Office:

- Avaya Cloud Office Phone application — standalone phone app.
- Avaya Cloud Office Mobile App — call, message, and meet from one app.
- A physical desk phone

In this section, we will do a quick overview of your organization's phone choice.



# Calling from Anywhere (continued)

## Avaya Cloud Office Applications Overview

Avaya Cloud Office has desktop and mobile applications available for all Avaya Cloud Office customers. These applications include:

- Avaya Cloud Office Phones – phone application for desktop and mobile.
- Avaya Cloud Office Meetings (both desktop and mobile)

We will be walking through the features and functionality of the apps your company will be using. We also have extensive online resources available to all Avaya Cloud Office users at [Avaya One Care](#).

## Avaya Cloud Office Phone Desktop App

To make and receive calls from your desktop computer use the Avaya Cloud Office Phone application. This application turns your computer into an all-in-one communication hub completely synced to your office network so you can collaborate with your colleagues and clients anywhere you have a broadband connection and a headset.


If you have a physical desk phone, you can still benefit from using this application to:

- Send and receive text and multimedia messages.
- Send and receive faxes.
- Add external and favorite contacts.
- Quickly start an audio conference.
- Check any incoming voicemail messages from your computer.
- Seamlessly join Avaya Cloud Office Meetings.
- Monitor colleagues' presence and availability.



# Calling from Anywhere (continued)

## Avaya Cloud Office Mobile App


<p>The Avaya Cloud Office Mobile application can be downloaded to any iOS or Android phone by going to the App or Play store. Having this app on your mobile device(s) gives you the ability to take business communication on the go. The features and functionality are very similar to the Desktop application, so if you are familiar with that software, you can easily utilize both for different situations.</p> <p>Let's walk through a scenario using the mobile application:</p>	<p><b>Facilitator's Notes:</b></p> <p>Share your Mobile app through the screen share, if you have an iPhone. Use the share option for iOS devices. You must be logged in to the meeting with your Avaya Cloud Office app, then you can share the screen from the app.</p> <p> <b>Reminder!</b> Choose one scenario to demo.</p>
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# Calling from Anywhere (continued)

Scenario	Demo
<p>You are at the airport and realize you forgot to change your voicemail.</p>	<ol style="list-style-type: none"> <li>1. Access your profile.</li> <li>2. Go to <b>Extension Settings &gt; Messages &amp; Notifications.</b></li> <li>3. Access <b>Voicemail Greeting &gt; Custom.</b></li> <li>4. Record new voicemail greeting.</li> </ol>

<p>You are at the Avaya Cloud Office user conference and would like to send a picture of the amazing hotel where the conference is being held to a colleague.</p>	<ol style="list-style-type: none"> <li>1. Go to <b>Messages</b>.</li> <li>2. Select New Text icon and <b>New Text</b>.</li> <li>3. Find your colleague's name by typing in the first few letters in the <b>To:</b> field.</li> <li>4. Select the picture icon to add the photo to the message.</li> <li>5. Type a quick message.</li> <li>6. Tap the send icon.</li> </ol>
<p>You are driving to client site and on the phone with a colleague when you notice the quality is dropping. You see that your data connection is not strong but your cellular service shows all the bars.</p>	<ol style="list-style-type: none"> <li>1. Initiate an active call.</li> <li>2. Select <b>Switch to Carrier</b>.</li> <li>3. <b>Call Flip</b> can also be used to flip the call to your personal cell phone service. There will be a brief hold on the other caller's side, if you have hold music set, it will play during the Call Flip but not if you select Switch to Carrier.</li> </ol>

## Conferencing and Collaborating

 <p><b>Conducting online meetings Discussion</b></p>	<ul style="list-style-type: none"> <li>• Do you work remotely and/or have colleagues and clients in different parts of the world?</li> <li>• Would it be helpful if you had a tool to meet with others in different locations and share your screen?</li> <li>• Do you conduct audio calls with multiple participants?</li> </ul>
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### Overview

As an Avaya Cloud Office customer, you have access to powerful audio and video conferencing tools. Avaya Cloud Office is a Cloud Video Conferencing service that unifies HD video conferencing, mobility, and web meetings together as a free cloud service. Avaya Cloud Office Meetings gives you the power to video conference and web share, as part of your complete business communications solution. Hold face-to-face meetings in high definition and share your desktop or documents with anyone, anytime, anywhere.

If you choose to hold audio-only conference calls, you can use the audio conference feature from multiple areas including the Avaya Cloud Office Phone desktop and mobile apps and directly from your online account. The audio conference feature give you access to host up to 1,000 participants on your personal bridge.

# Conferencing and Collaborating (continued)

## Avaya Cloud Office Meetings



Avaya Cloud Office Meetings is a complete web conferencing solution for business with HD video conferencing, and collaborative screen sharing. All end users have the ability to host face-to-face meetings, their desktops, applications, or whiteboard with anyone, anytime, anywhere.

We have been using the Avaya Cloud Office Meetings application to conduct our training sessions, so you should be familiar with the basic functionality while participating in a meeting.

## Avaya Cloud Office Audio Conferencing

Avaya Cloud Office Audio Conferencing enables Avaya Cloud Office customers to setup and join conference calls. Each Avaya Cloud Office User gets a unique Host access code, and unique Participant access code. With the 'invite' feature, Avaya Cloud Office Users can easily send conference details to participants via text or email.


You can access your personal audio conference information from the following areas:

- In the online account under **Settings > Phones & Numbers > Conference.**
- In the online account through the Conference Icon .
- In the Desktop or Mobile applications through the Conference Icon .

In the Avaya Cloud Office phone applications, you can quickly start an audio conference without having to enter the host code.



# Messaging (Chats, SMS, Fax)

 <p><b>Team collaboration Discussion</b></p>	<ul style="list-style-type: none"> <li>• Do you currently use any instant messaging tools?</li> <li>• What do you know about team collaboration applications?</li> </ul>
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## Overview

In addition to making and receiving calls with the Avaya Cloud Office app, you can streamline workflow with built-in options such as instant messaging with individuals and teams, text messaging, and faxing. You can also manage calendars, task management, and file sharing using the team messaging (Glip) feature. Within the app, you can switch between different modes of communication with options that include sending messages via chat, SMS/MMS, or fax, and making a call or a video chat.

## Avaya Cloud Office Glip

80% of those surveyed by ZK Research report that team messaging and collaboration tools boost productivity and efficiency.

Avaya Cloud Office Glip provides access to all of a team’s resources— such as shared files, calendars, and task lists—in one place. Glip, at its core is a chat tool, but also builds upon the general instant messaging into an immersive collaborative workspace where teams collaborate in real time. This collaborative workspace offers the context and content teams need to get more work done and complete projects more successfully. Rather than checking inboxes and calendars, users see a real-time team experience within a shared virtual team meeting place that transforms communications into collaboration.

Let’s review some of the most common issues companies face, and how Glip can help solve them.

Problem	Solution
Communication breakdowns	Avaya Cloud Office Glip supports frequent, ongoing communication with team message posts, online video meetings, and one-click calling.

Communication overload	Glip reduces the amount of back and forth and 'reply all' emails with quick one-on-one or team chat conversations.
Collaboration is a behavior, not a technology	Glip encourages collaboration as a routine part of team communication, so that sharing a file or assigning a task is as easy as sending a basic message.
Today's workplace is not confined within the walls of an office	The Glip mobile application allows people to check in and get work done from anywhere.
Employee perception that managers are out of touch	The team collaboration environment creates an open atmosphere that encourages people to speak their minds and reach their managers directly.
Trouble managing files	Glip has no limit on file upload size and storage.



## Sending and Receiving Text Messages

You can send and receive SMS and MMS messages within you Avaya Cloud Office phone application using your business presence. When your colleagues and external contacts are also using Glip, it is easy to send a quick chat ans attach a file to interact with contacts using the Avaya Cloud Office app.

If your contacts are not using Glip in the Avaya Cloud Office app, it is just as easy to send a quick message directly to their mobile devices. You can also easily send SMS and MMS messages using the standalone Avaya Cloud Office Phone application.

## Avaya Cloud Office Faxing

The Avaya Cloud Office Fax feature lets you easily send and receive faxes directly from your laptop, tablet, or smartphone. Send your faxes by:

- Email
- Faxout from your online account (  icon)
- Desktop and Mobile Applications (  icon)

You can receive faxes to your direct number, and retrieve them from the **Messages** features in the online account and phone applications.

# Managing Your Extension Settings

## Overview

Avaya Cloud Office puts the power of customization into the end users' hands, with direct access to personal extension settings through the Avaya Cloud Office Online Account. Users can access their own extension settings through the Avaya Cloud Office Online Account by logging in to <http://service.cloudoffice.avaya.com> with your Avaya Cloud Office phone number and password or single sign-on. You can also log in with your email address, if you set up that access.

In the online account, you can:

- Check all messages and calls received.
- Access Company contacts and add external contacts.
- Download the Avaya Cloud Office applications.
- Update password and security information.
- Set up Presence display and permissions.
- Customize the caller experience.
- Set up Call Forwarding rules for different situations.
- Update voicemail greeting and notifications.
- Change outgoing caller ID on specific devices.
- Customize outbound fax settings.

## Settings

The Settings feature contains the bulk of the sections end users will want to access to update the caller experience. These sections are organized under two tabs and include:

- User Details
- Phones & Numbers
- Screening, Greeting & Hold Music
- Call Handling & Forwarding
- Messages & Notifications
- Caller ID
- Fax Settings
- Meetings Settings

We will present a high-level overview on a few of these sections that are configured most often, but if there are any questions on other sections, we can go into those areas as well.

# Managing Your Extension Settings (continued)

## Phones & Numbers

In the Phones & Numbers section, you can view your phones and numbers, edit your presence and intercom settings as well as view your conference numbers and invite people to a conference call via email.

The **Presence** and **Intercom** features are located under the **Phones** tab. Users can set up **Appearance** and **Permissions** for the Head-Up Display on their phones.


Audio conferencing information can be found under the **Conference** tab. All end users have access to their own conference line, which can host up to 1,000 callers.

## Call Handling & Forwarding

A user can set up different call forwarding rules for their extension by adding up to 10 forwarding numbers. Calls can be set to ring at these numbers sequentially or simultaneously. The Avaya Cloud Office Phone applications will always ring together.

You can indicate for how long you want one device to ring before the call is forwarded to another phone, as well as forward calls to others.

Let's walk through a scenario:

Scenario	Demo
<p>You will be in an all-day meeting and are expecting an important call. A colleague has agreed to answer your phone calls.</p>	<ol style="list-style-type: none"> <li>1. Go to <b>Call Handling &amp; Forwarding</b> &gt; click the  button &gt; <b>Forward to Other's Phones</b>.</li> <li>2. Select a user to which the calls should be forwarded.</li> <li>3. Click <b>Done</b>.</li> <li>4. When you no longer need calls forwarded, make sure you removed that user using the same process.</li> </ol>



You are working from home and sometimes have spotty cell and Internet connections, so you have to use your land line at times.

1. Go to **Call Handling & Forwarding > + Add Call Forwarding Phone.**
2. Enter your home phone number into the **Number** field.
3. Enable the phone under the **Active** column.
4. Indicate the amount time for the call to ring before it is forwarded in the **Ring For** column.

## Messages & Notifications

In this section, users can decide if they would like to take messages, set up a voicemail greeting, and choose how to be notified for different interactions.

### User Hours

*Take Messages* — Enable voicemail.

*Voicemail Greeting* — Update voicemail greeting to a Custom greeting, or keep Default greeting.

*Message Recipient* — Indicate if you would like your voicemail messages received by a different extension.

**After Hours** — Update the same options as under the **User Hours** for when you will be out of the office.

### Settings

*Notifications* — Indicate if and how you would like to be notified of new voicemail messages, received faxes, missed calls, fax transmission results, and received text messages. In the **Advanced Settings**, you can click on the **Customize**

**Notifications** link to select if you would like to receive an attachment of a voicemail message or fax with the email notification.



# Resources

## Overview

Avaya Cloud Office has many self-service resources available for any customer to use at any time to help with employee onboarding and questions, as well as to collaborate with the Avaya Cloud Office community.

## Customer Care Center (Success)

The Avaya Cloud Office Customer Care Center can be located at <http://onecare.avaya.com/avayacloudoffice> for access to online learning resources and Knowledgebase Search for any topic to access an extensive database of helpful articles and guides.

Scenario	Demo
An end user was unable to attend this training session so they need to go to Avaya Cloud Office University to access learning resources.	<ol style="list-style-type: none"> <li>1. Go to Avaya Cloud Office University and log in.</li> <li>2. Click the <b>Video Board</b> to display the video options available.</li> <li>3. Click the <b>My Learning &gt; Catalog</b> to display the Learning Plan options available.</li> </ol>

## Summary

This training session provided an overview of how an end user can interact with the Avaya Cloud Office Online Account, as well as the available applications. We hope the information will help you get started with Avaya Cloud Office, and eventually become a power user who is able to efficiently streamline different types of communication through the available tools.

# Appendix

## Online Account - Overview

The Overview page is your account homepage. It shows your recent voicemail, faxes, and inbound and outbound calls.

## Online Account - Messages

All voicemail and faxes are stored within the Messages section. These messages can be reviewed, saved, forwarded, and deleted from this area.

## Online Account - Call Log

The **Call Log** provides customized reports on inbound and outbound calls and faxes for the company number and specified extensions. Users can select the time period, type of call (inbound or outbound), blocked calls, or recorded calls, and also save reports for analysis. Call logs can be delivered to an email address daily, weekly, or monthly on specified days.

The **Detailed** link will display a more extensive view of the Calls received. Gathering information from this view is recommended when you experience any possible call quality issues. Providing the more detailed log information to our Support team is very helpful.

## Online Account – Contacts

The **Contacts** feature will have your Company directory pre-loaded, and you can search for contacts under the **Company** tab. In the **Personal** tab, you can add external contacts individually, or as groups. You can enter the contact information manually, as well as import a CSV file from Microsoft Outlook. The personal contacts can also be exported from this area.

## Online Account - User Details

### General

*Record User Name* — If you have a name that is difficult to pronounce, you can record the correct pronunciation of your name here.

*Contact Phone* — This phone number is used to verify your identity.

*Change Password* — Password, PIN, and Security Question can be changed from this area.

## Online Account - Screening, Greeting & Hold Music

The Avaya Cloud Office system comes with a default personal greeting, connecting message, and audio while connecting. Users can easily disable or change these options in this section. Hold music can also be customized, and users can block specific phone numbers from reaching their line.

*User Greeting* - Turn on this option when you want the system to answer the call with a recorded welcome message so callers know they've reached the right person. Please note this greeting is not a personal voicemail announcement.

*Call Screening* - Turn on this option when you want callers to announce their name before continuing to connect the call. If a user has Call Screening enabled, they can update how calls are handled **After Hours** under that tab.

*Connecting Message* — A recorded message can be set to let callers know the call is being connected to your line.

*Audio While Connecting* - Incoming callers will hear the music selection that is configured with this setting.

# Appendix (continued)

## Online Account - Outbound Caller ID

Users can select what phone number displays as their outgoing Caller ID on different devices. If they have a direct number, that number can be selected, or they can choose to display a general Company number. Features to which Caller ID can be customized:

- RingMe
- Call Flip
- Fax Number
- Common Phone
- Additional devices or applications assigned to the extension

## Online Account - Fax Settings

The following items can be updated from this section:

- Fax Number
- Fax Cover Page
- Faxes Sent via Email

## Online Account - Meetings Settings

Under the **Meetings** tab, Avaya Cloud Office Meetings users can customize available settings to enable or disable specific options when using the application. Admins can control end user access to each setting, if certain items should be restricted, by going to **Tools > Meetings > Meetings Settings**.