Connect Client

MiTeam Meetings Solution Document for MiVoice Connect

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Mitel®

Contents

Introduction

This guide provides information on how to provision MiTeam Meetings for Connect Client users.

Note: The provisioning is supported from MiVoice Connect 19.2 release onwards.

Target Audience

This guide is intended for Mitel Partners who provision MiTeam Meetings for Connect Client. It is necessary that users of this document have a good working knowledge of CloudLink Accounts Console.

About MiTeam Meetings

MiTeam Meetings is a cloud-based video collaboration tool (based on the CloudLink infrastructure) that enables a user to access features, such as:

- Collaborate: Perform audio, video, and web sharing
- Chat: Hold chat sessions and receive chat notifications within the meeting

Users can launch the MiTeam Meetings application from Connect Client. For more information, see the *Accessing MiTeam Meetings From Connect Client* section in the *Connect Client User Guide*.

MiTeam Meetings limitations include:

- Full Video Meetings Support is for a maximum of 100 users per session.
- Fair use policy: This policy limits a meeting duration to 20 hours.

Provisioning MiTeam Meetings for Connect Client Users

Following are the high level steps to provision MiTeam Meetings for Connect Client users:

1. Log in to MiAccess and select the **CloudLink Accounts Console**. For more information, see Logging in to the CloudLink Accounts Console on page 6.
2. Create a Customer Account. For more information, see Creating and Integrating a Customer Account on page 7.
3. Assign licenses to the Customer Account. For more information, see Licensing for MiTeam Meetings on page 10.
4. Add users to the Customer Account. For more information, see Adding Users in the Customer Account on page 11.
5. Enable MiTeam Meetings for Connect Client users. For more information, see Enabling MiTeam Meetings for Connect Client Users.

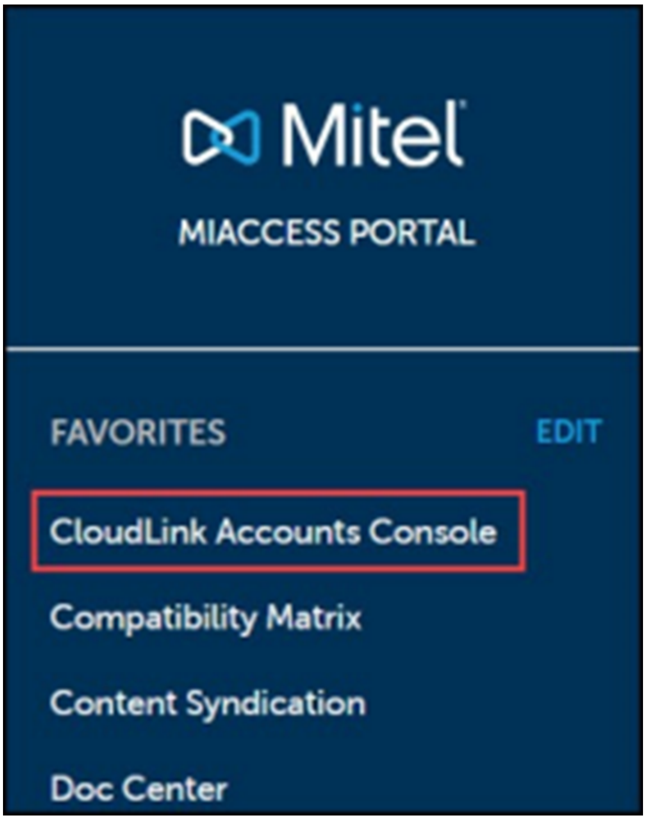
Logging in to the CloudLink Accounts Console

As a partner, and user, follow these steps to log in to the CloudLink Accounts Console:

Note: For the latest updates on the CloudLink Accounts Console, see the CLoudLink Accounts documentation located at https://www.mitel.com/document-center/technology/cloudlink/all-releases/en/cloudlink-accounts-html.

1. Log in to the MiAccess portal using your MiAccess credentials.
2. On the left column, select **CloudLink Accounts Console**.

Figure 1 : CloudLink Accounts Console



Note: If you are unable to view this option, contact MiAccess Support.

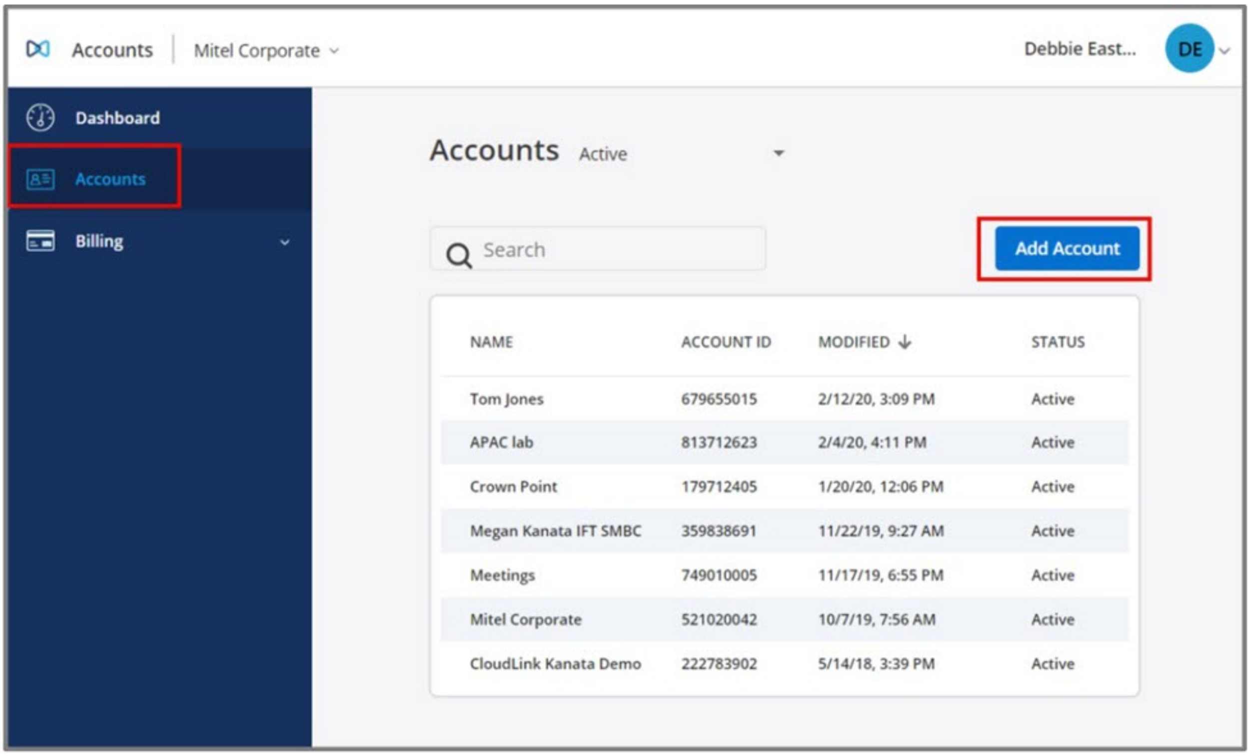
Creating and Integrating a Customer Account

Note: To add administration accounts to allow you to provision MiTeam Meetings, see the *CloudLink Accounts Help* document located at https://www.mitel.com/document-center/technology/cloudlink/all-releases/en/cloudlink-accounts-html.

To create a Customer Account, follow these steps:

1. In the CloudLink Accounts Console, go to **Accounts** and click **Add Account**.

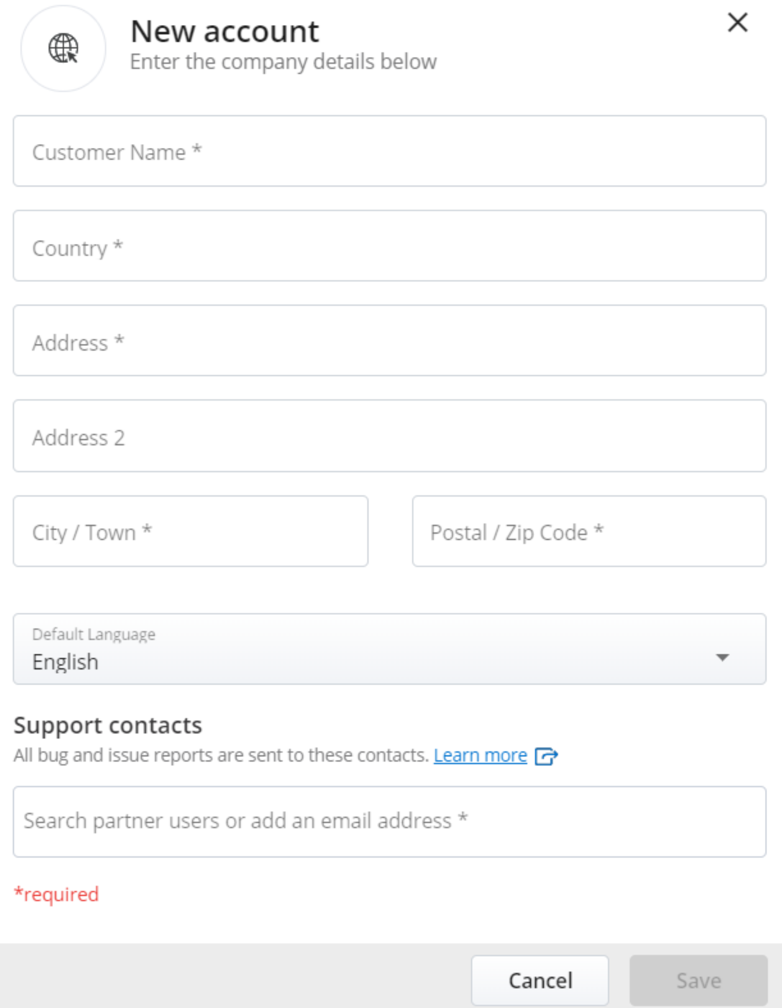
   Figure 2 : Adding an Account



2. Complete the following fields:

- **Customer Name**
- **Country**
- **Address**
- **City/Town**
- **Postal/Zip Code**
- **Default Language**
- **Support Contacts:**
  - To add a partner in the **Support Contacts** search field, enter the name of the Partner you are searching for, and select the name.
  - To add an explicit email address as that of a Support Contact, enter the email address in the **Support Contacts** search field. If the email address is valid, the **Add** option will be displayed. Click this option to add the email address as that of a Support Contact.
    Note: If the email address is not valid, the message **Last entered text doesn't match with partner user nor is it a valid email address** will appear.

Figure 3 : Creating the account

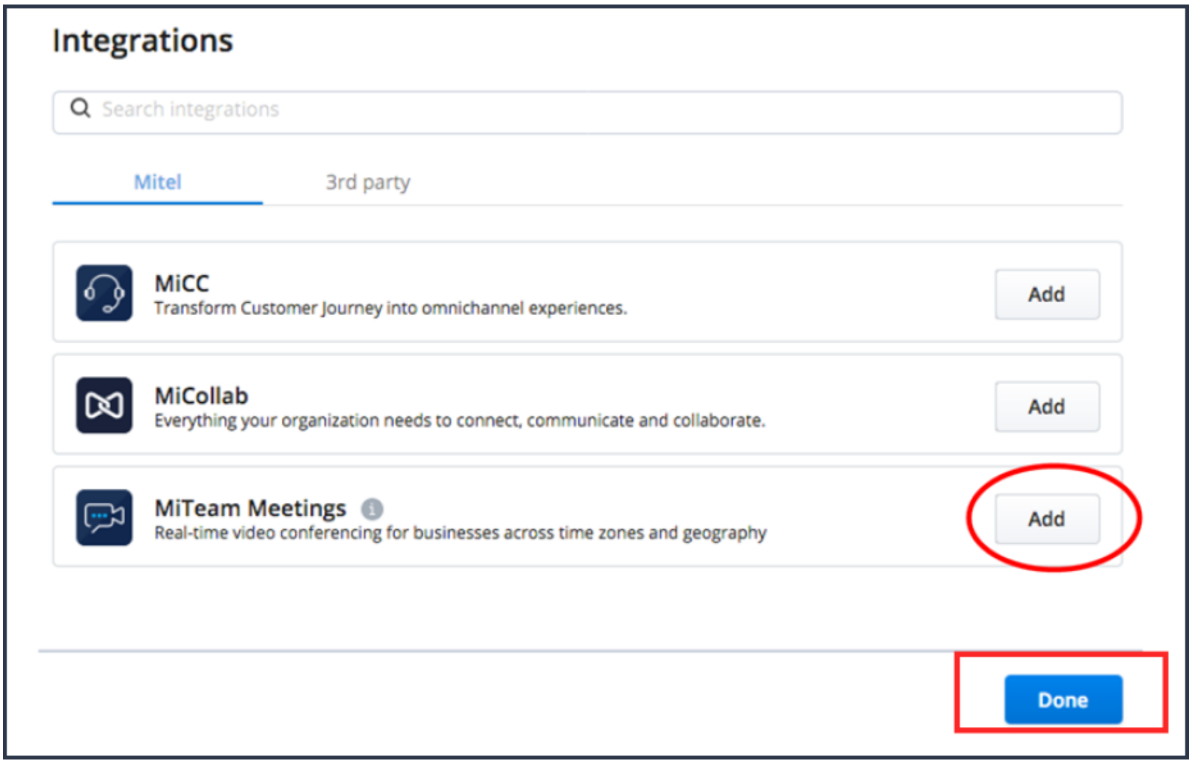


3. Click **Save** to create the customer account.
4. In the **Account Information** page that opens, go to **Integrations** and select **Add new**.

Figure 4 : Integrations page

5. In the page that opens, select **MiTeam Meetings** from the integration list, and click **Add** > **Done** to enable the required privileges for the customer account.

Figure 5 : Integrations List



Licensing for MiTeam Meetings

Partners order MiTeam Meetings subscription licenses using CPQ. The ordered licenses are listed in the **Orders** page of the CloudLink Accounts Console (for the Partner). Partners can assign licenses from these orders to Customer Accounts.

After licenses are assigned to a Customer Account, MiTeam Meetings can be enabled for users in that Customer Account by the Partner or by an Account Admin of that Customer Account.

Note: Only registered MiTeam Meeting users can create meetings using MiTeam Meetings.

Assigning MiTeam Meetings Subscription Licenses

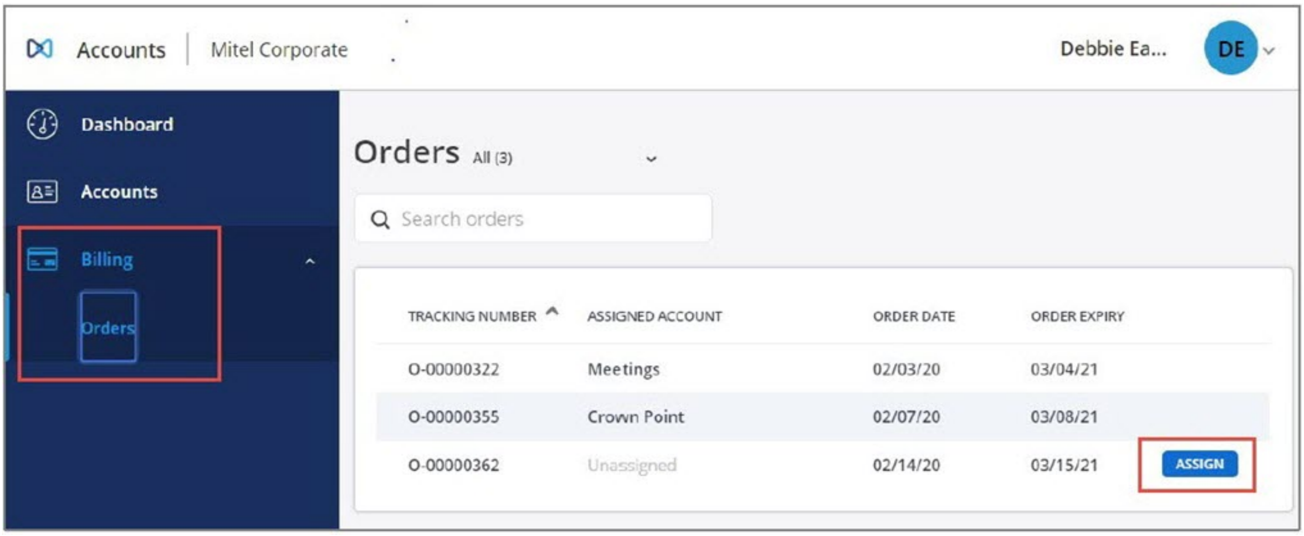
Note: As a Partner representative, you must have:

- A CloudLink Account Console Administrator user name and password.
- Access privileges to any Customer Account you want to view or assign licenses to.

As a Partner (or Partner representative) you can view and assign MiTeam Meetings subscription licenses by using the following procedure:

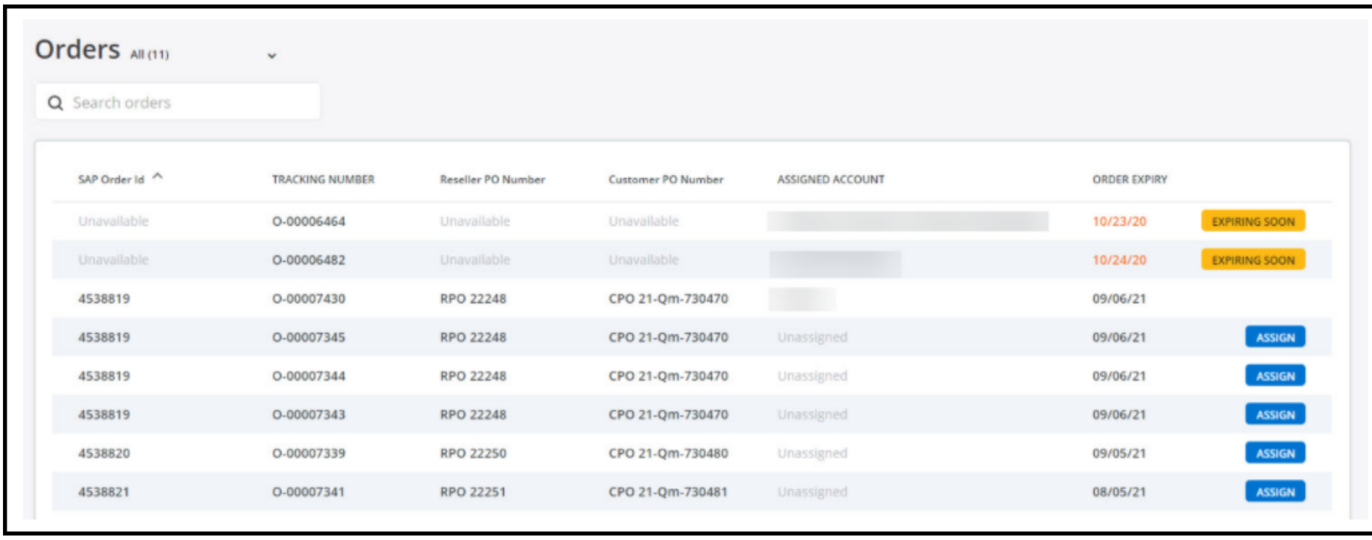
1. On the CloudLink Account Console, select **Billing**> **Orders**. The **Orders** page opens, listing the MiTeam Meetings licenses you purchased.
   Note:
   - The **Orders** page lists the MiTeam Meetings subscriptions purchased by a Mitel Partner. When a Partner purchases a subscription it is automatically listed in this page as an Order.
   - The **Orders** page will display a table including the Tracking Number, Assigned Account (the actual Customer Company, only for orders already assigned to some Customer Account), Order Date, Order Expiry. An un-named column will appear indicating **Assign** or if that order will expire soon. If **Assign** appears, the Assigned Account will be blank. This means that licenses against that order have not yet been assigned to any Customer Account.

Figure 6 : Orders Page



2. To view the orders, click the down-arrow beside Orders, and from the drop-down list, select to view a list of all orders, unassigned orders or expiring orders by clicking **All**, **Unassigned**, or **Expiring** respectively.

Figure 7 : Viewing the Orders



3. In the **Search** orders bar, the SAP order ID, the reseller PO number, the customer PO number, the account to which an order is assigned, the tracking number, or the expiry date of order you are searching for. The **Orders** page displays a list of matching orders as you type the characters.
4. Click the **Assign** button adjacent to the Order you purchased. A panel opens.
5. To assign the license, from the drop-down list, choose the **Company** name (Customer Account) to which you want to assign the Order. Click **Assign**. All the licenses in that Order are assigned to the Customer Account. See the **Orders** section of the **Account Information Page** to view the license details.
   Note: If there is no existing Customer Account, select **Create Account**. CloudLink will redirect you to the **Accounts** section where a Customer Account can be created.

Note: After you assign the licenses to a Customer Account, you can identify how many MiTeam Meetings licenses will be provided to that Customer Account based on the Tracking number for the Order.

Adding Users in the Customer Account

Users can be added to a Customer Account in the CloudLink Account Console using one of the following methods:

- Adding a user one at a time. For more information, see Adding Users One at a Time and Enabling MiTeam Meetings.

- Bulk import the users using the CSV file. For more information, see Adding Users and Enabling MiTeam Meetings by Using the Bulk Import Option on page 14.

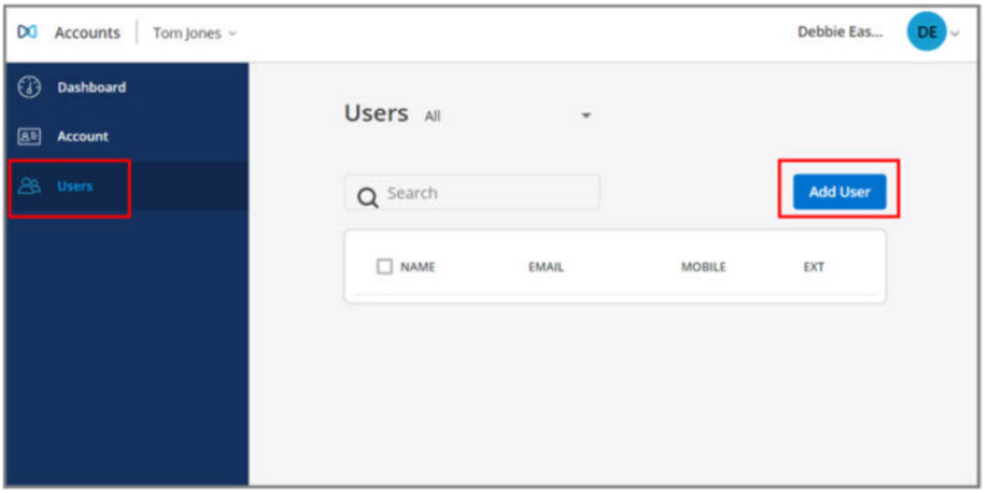
Adding Users One at a Time and Enabling MiTeam Meetings

Note: Both Partners and Account Admins of a Customer Account can add users to a Customer Account.

To add users one at a time, follow these steps:

1. On the CloudLink Account Console, select the Customer Account to which you want to add the user, go to **Users**, and click **Add User**.

   Figure 8 : Adding Users

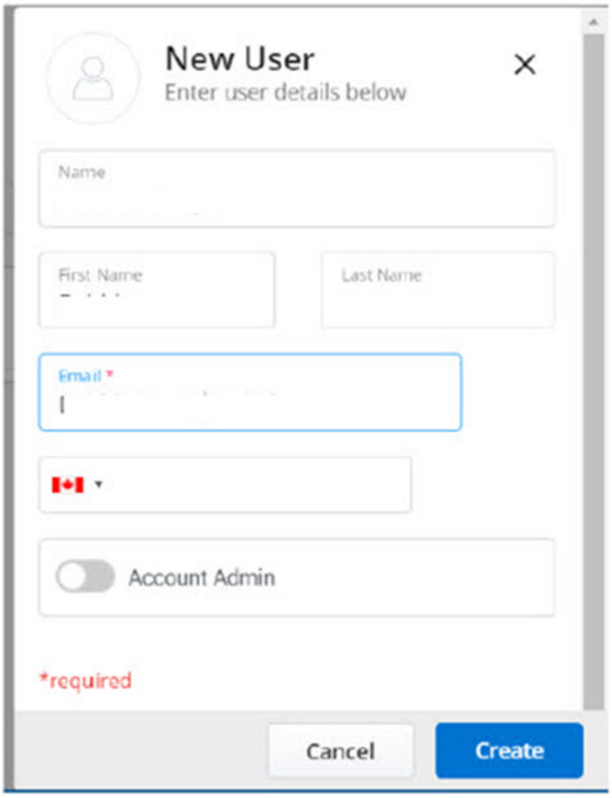


2. In the window that opens, complete the following fields and click **Create** to add the user to the selected Customer Account.

   Table 1: Fields on the New User Window

Field	Description
Name	Enter the user's full name.
First Name	Enter the user's first name.
Last Name	Enter the user's last name.
Email	Enter the user's email address. **Note**: Ensure that the email address is correct, otherwise the user will not be added.
Region as indicated by flag	Select the flag for the user's country.

Figure 9 : New User Window

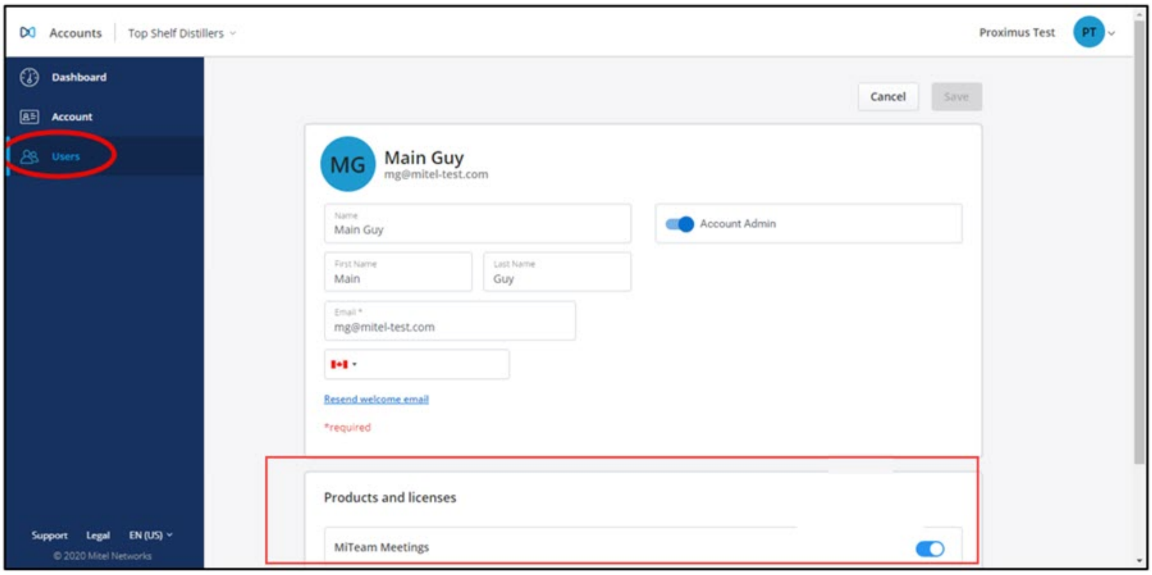


Note: A welcome email is automatically sent to the user, using which the user can validate and register the Customer Account.

3. Enable MiTeam Meetings for the users by following these steps:

   a. Click the user for whom you want to enable MiTeam Meetings. The **User Details** form opens.
   b. In the **Products and licenses** section of this form, enable the **MiTeam Meetings** toggle button to enable MiTeam Meetings for the selected Connect Client user.
   Note: MiTeam Meetings can be enabled for users included in a Customer Account by both Partners and Admins of that Customer Account.

   Figure 10 : Enabling MiTeam Meetings

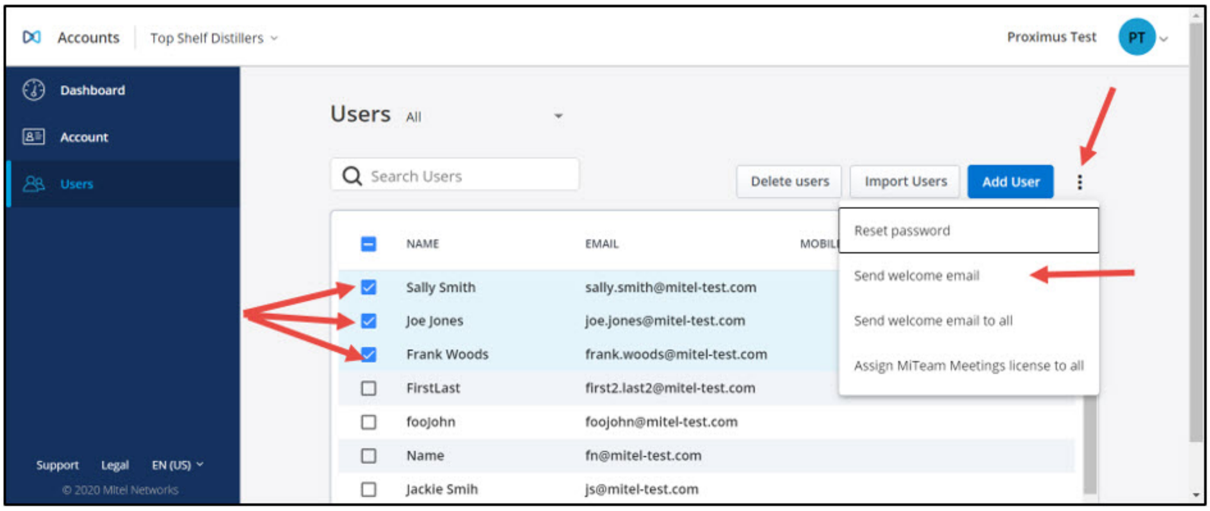


   c. After MiTeam Meetings is enabled for the user, send a welcome email. To send the email, select the list of users, expand the icon beside the **Add User** option and select either of the following options to send an email:

   - **Send welcome email** (an email is sent to the selected users)

- **Send welcome email to all** (email is sent to all users)

Figure 11 : Sending a welcome email



Note:

It is recommended that the users are informed of the following:

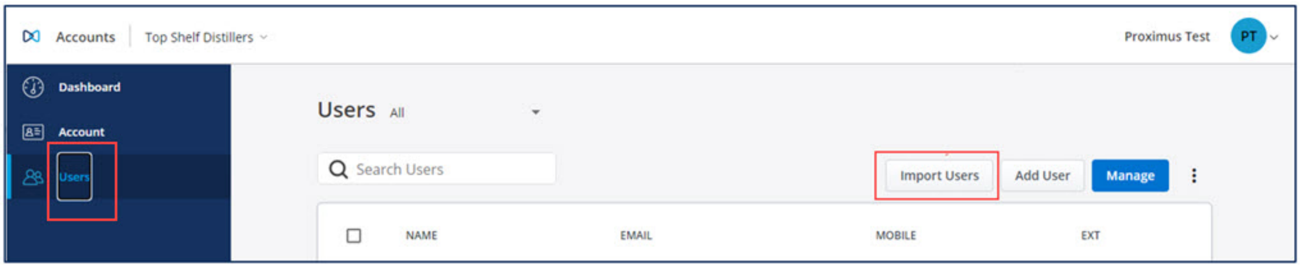
- They have been provided access to MiTeam Meetings.
- The MiTeam Meetings application is enabled on Connect Client.
- They must register their MiTeam Meetings account by using the welcome email they received when they were added to a Customer Account. For more information, see the *Registering MiTeam Meetings Account* section in the *Connect Client User Guide*.

Adding Users and Enabling MiTeam Meetings by Using the Bulk Import Option

To add users by using the **Bulk Import** option, follow these steps:

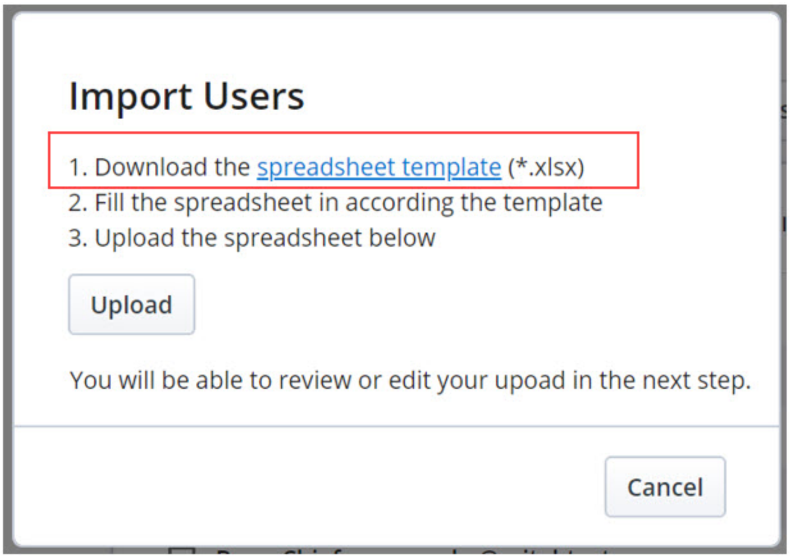
1. On the CloudLink Account Console, select the Customer Account and click **Import Users** from the **Users** page of the Customer Account. The **Import Users** panel opens.

   Figure 12 : Import Users



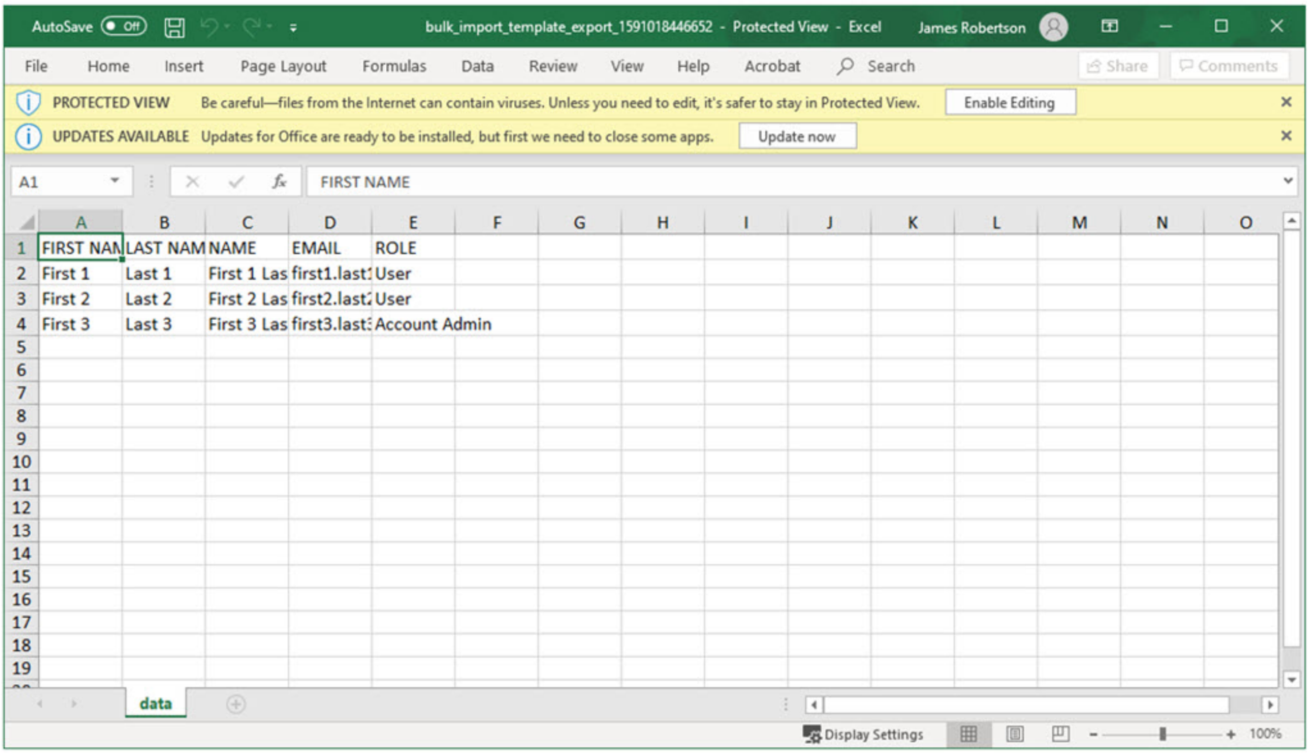
2. In the **Import Users** panel, click the **spreadsheet template** link. An Excel sheet template opens.

   Figure 13 : Spreadsheet Template Link



An example of the spreadsheet is as follows:

Figure 14 : Example of Spreadsheet Template

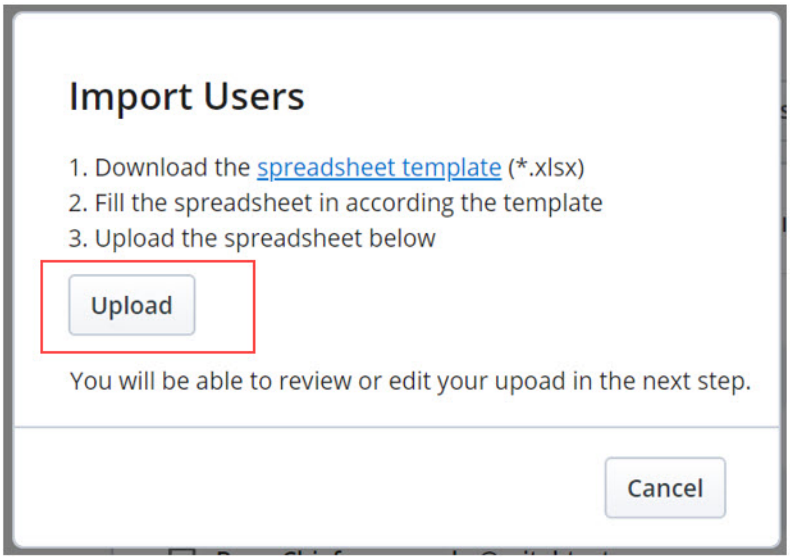


3. In the template that opens, enter details in the following fields for each user that you want to add to the Customer Account:

   - **First Name**
   - **Last Name**
   - **Name (full name)**
   - **Email:** Enter a valid email address
     Note: Ensure that you do not enter:
       - An email address of a user already in the selected Customer Account.
       - The same email address for different users.
   - **Role:** Enter a user role for each user.
     Note: If you want to grant admin rights to a user, enter **Account Admin** as the role. If you do not enter a user role, the default role **User** is assigned to that user.

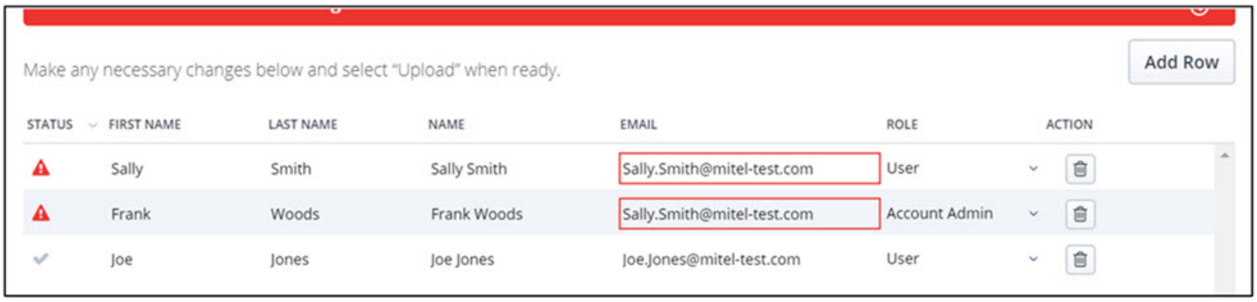
4. Click **Save** to save the spreadsheet on your machine and close the spreadsheet.
5. Return to the **Import Users** page of the Customer Account, and click **Upload** from the **Import Users** panel. A window opens. Navigate to the location where the spreadsheet is saved, select the spreadsheet, and click **Open**. A Preview window opens.

Figure 15 : Uploading the spreadsheet



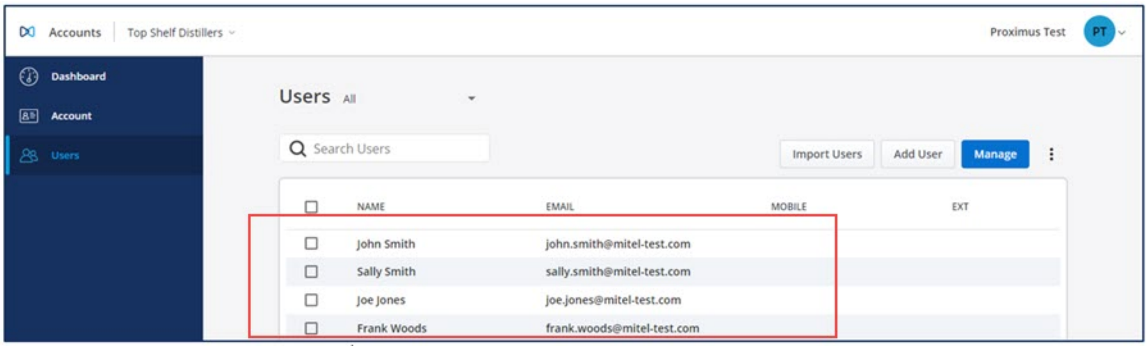
6. The Preview window summarizes the user details you entered. The **STATUS** column for a user will show an error icon if there is an error in the entry for a user's details.

Figure 16 : Example of errors in the spreadsheet



7. You can proceed to add the users in the spreadsheet to the Customer Account by clicking **Upload**. However, if you proceed to add users when the **STATUS** for some of the users shows the error icon:
   - The users without errors in the user details are added to the Customer Account and will be removed from the Preview window.
   - The users with errors in the user details will not be added to the Customer Account. They will continue to remain in the Preview window until you make the required corrections and add them to the customer account or delete them.
8. Click the fields that have errors and make the required corrections. If there are no errors in any of the user details, a label at the top of the Preview window displays **No errors found**.
9. Click **Upload** to add the remaining users to the Accounts Console. The users will now be listed in the **Users** page of the Accounts Console.
   Note: If you click **Cancel** in the **Import Users** page, the bulk import operation is canceled.

Figure 17 : Example of New Users List

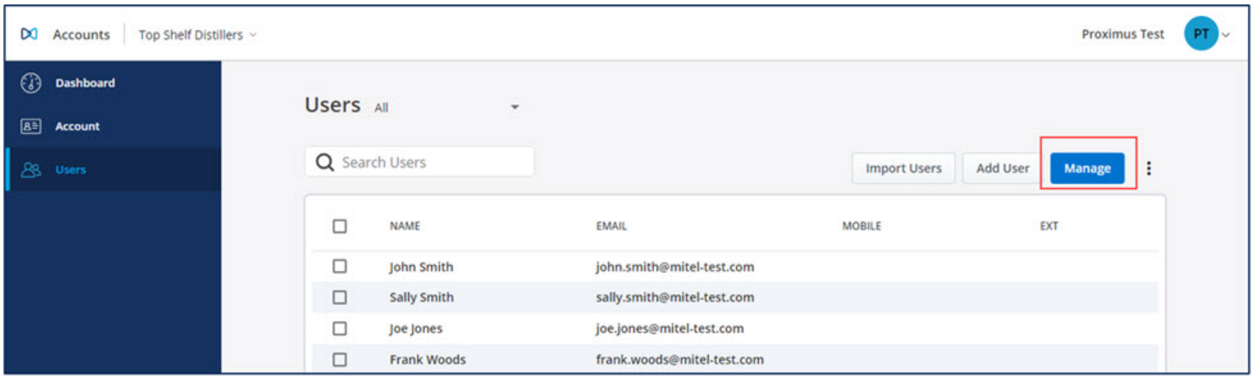


Note: The **Bulk Import** option does enable you to automatically send a Welcome Email and it must be done manually.

10. Enable MiTeam Meetings for the users by following these steps:

   a. From the **Users** page, select the list of users for whom you want to enable MiTeam Meetings.
   b. Click **Manage** to enable MiTeam Meetings for these users.

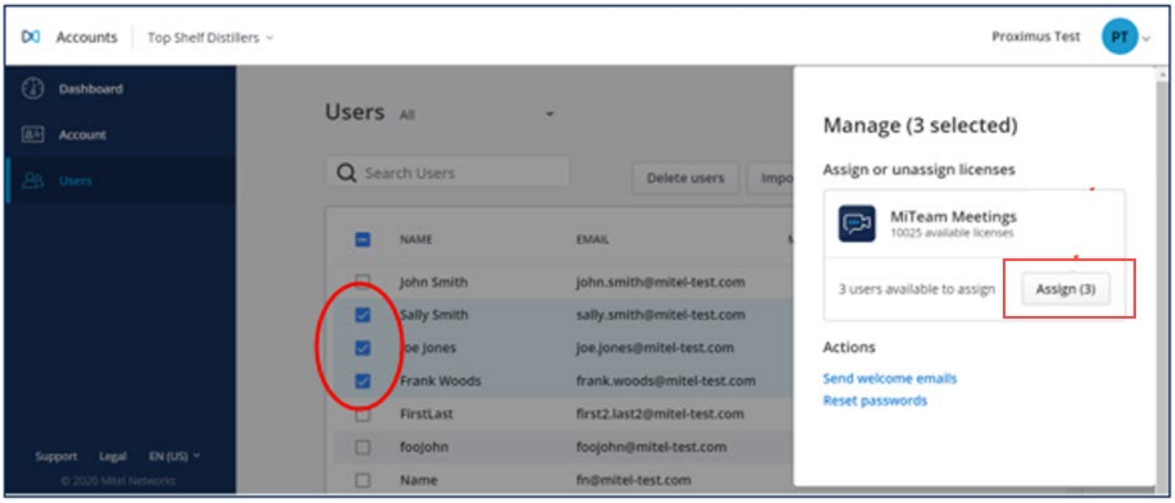
Figure 18 : Manage option



Note: This option allows you to:

- Assign MiTeam Meetings licenses to selected users. (see Enabling MiTeam Meetings)
- Assign MiTeam Meetings licenses to all users (if the **Users** option is not selected).
- Unassign MiTeam Meetings licenses to all users (if the **Users** option is not selected).
- Unassign MiTeam Meetings licenses for selected users.
- Send Welcome emails to all or selected users.
- Reset passwords to all or selected users.

Figure 19 : Enabling MiTeam Meetings



c. After MiTeam Meetings is enabled for the users, select **Send welcome emails** to send a welcome email the users for whom MiTeam Meetings is enabled.

Reference Documents

For additional information, refer to the following documents located at Mitel Doc Center:

- CLoudLink Accounts
- MiTeam Meetings
- Connect Client User Guide