




Telstra Collaboration

Management Portal User Guide

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End users

Introduction

Welcome to your calling solution, Telstra Collaboration. You can set up and use this service to:

- Make and receive voice and video calls
- Collaborate with team members using instant messaging and presence

Telstra Collaboration Management Portal – currently for administrators only

In the future, as an end user, you'll also be able to use this portal to configure the call settings for your service.

Telstra Business Connect app

You can configure your service with the [Telstra Business Connect](#) app.



Telstra Business Connect allows you to search your enterprise directory for contacts, click easily to call a user or add them to your contact list, and it can be used to control your handset.

You can download Telstra Business Connect to tablets, PCs, Android phones, iPhones and iPads.



Need help?

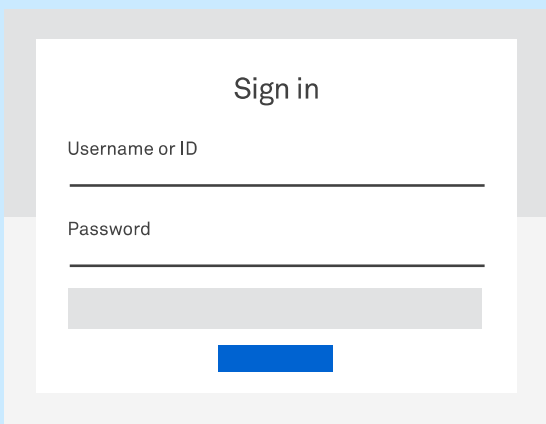
Contact your administrator.

Follow the welcome email

Use the link in the Telstra Collaboration welcome email to set your password, which can be used for the **Telstra Business Connect** app (see previous page).



Remember, the Telstra Collaboration Management Portal is currently for administrators only, so you won't have access to this after setting your password.



Sign in

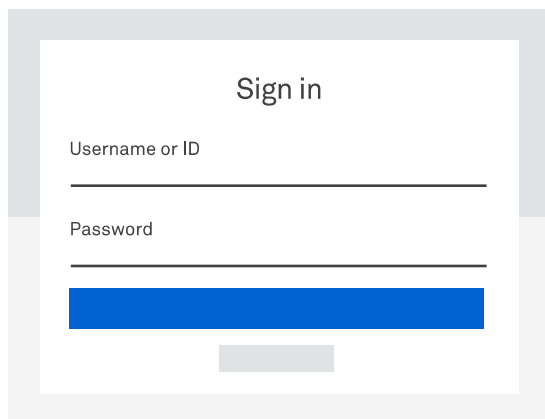
Username or ID

Password

Reset your password

Visit collaboration.telstra.com in your browser.

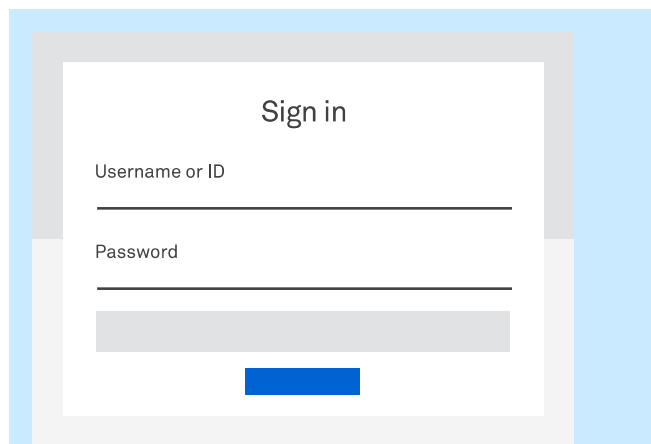
Select the **Forgot password** link and follow the prompts.



Login

Visit collaboration.telstra.com in your browser.

Enter your **email address** and **password** to log in to your account.



- 1. Try resetting your password**

Visit collaboration.telstra.com in your browser.

Select **Forgot password** and then follow the prompts.
- 2. Talk to your administrator**

Your administrator can confirm your email address and send a password reset email to you, if needed.

If all else fails, try clearing your browser's cache before trying again

Each browser is a little bit different; we recommend visiting refreshyourcache.com for relevant instructions.

Administrators

Introduction

Welcome to Telstra Collaboration, your calling solution. You can set up and use this service to:

- Make and receive voice and video calls
- Collaborate with team members using instant messaging and presence

Telstra Collaboration Management Portal

Use the portal to set up and update end-user details and configure the group services (e.g. hunt group) that have been provisioned on your service.

If you have an existing calling service that you'll be transitioning to Telstra Collaboration, you'll also find the controls in this portal to initiate the cutover process.

What your end users can do

The Telstra Collaboration Management Portal is currently for administrators only.

End-user interaction with the portal is only for setting and resetting their password for use with the [Telstra Business Connect](#) app.

(Telstra Business Connect allows you and your users to search your enterprise directory for contacts, click easily to call a user or add them to your contact list, and it can be used to control your handset.

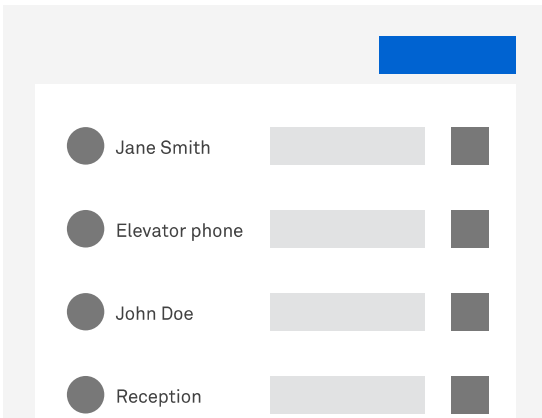
You can download Telstra Business Connect to iPhones, iPads, Android phones, tablets and PCs.)

Need help?

Log your issue with [Telstra Connect](#) and we'll be in touch.

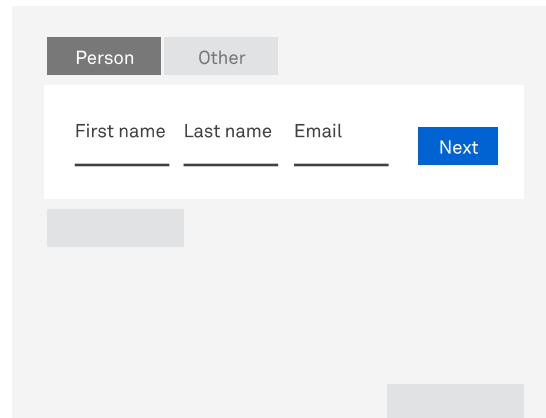
Telstra Connect is our self-serve hub where you can manage your business and enterprise services without having to call us or wait for an email response.

You can also access Telstra Connect by downloading the app: [iOS](#) / [Android](#).



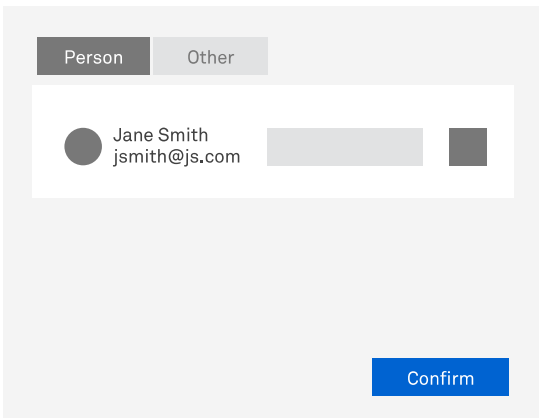
1. Start adding

After navigating to the **Users** page from the main menu, select the **Assign** button.



2. Enter the person's information

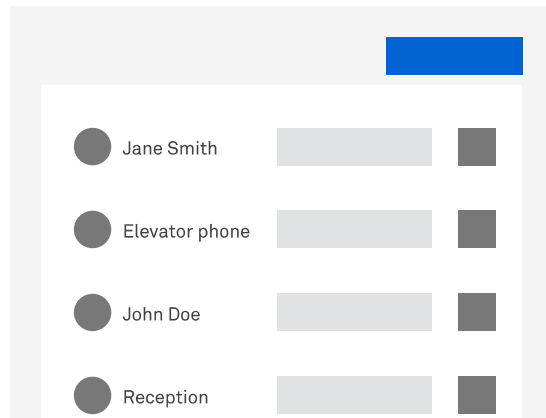
After selecting **Next**, you can then enter the relevant address, feature pack details and assign a device and number to the person.



3. Confirm to complete

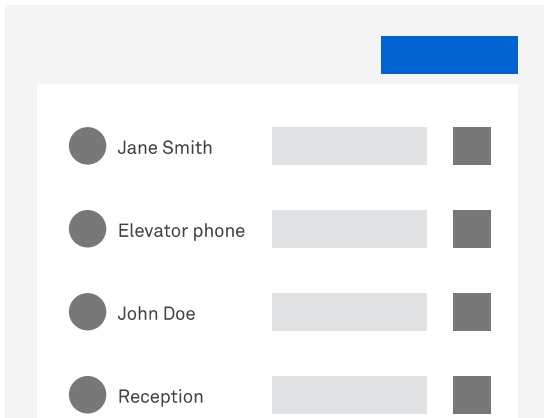
Select the **Confirm** button to finalise the additions.

Add more if desired.



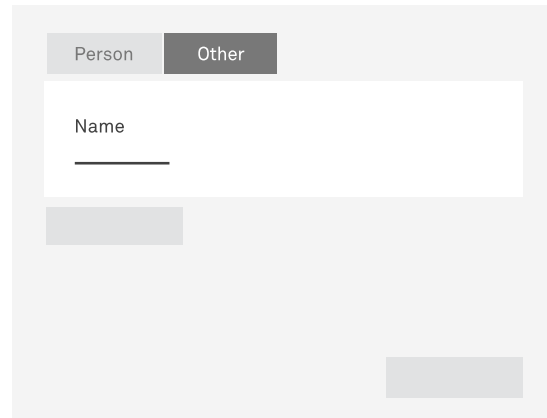
4. View your users

Visit the **Users** page again to see the new additions.



1. Start adding

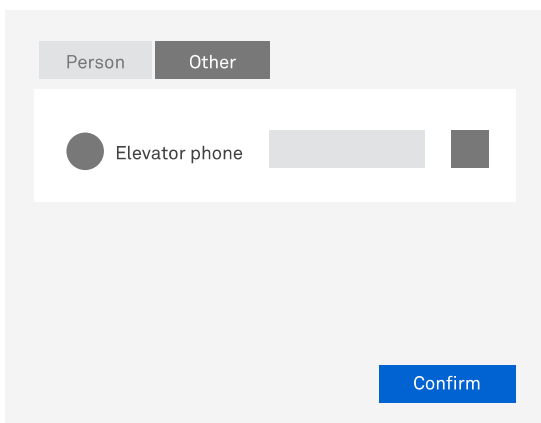
After navigating to the **Users** page from the main menu, select the **Assign** button.



2. Provide details

From the tabs, select the **Other** option. Enter the name of what you are adding and select **Next**.

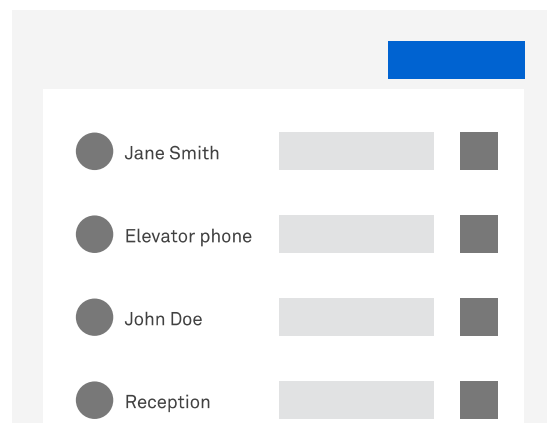
You can then enter the relevant address details and assign a device and number to the user.



3. Confirm to complete

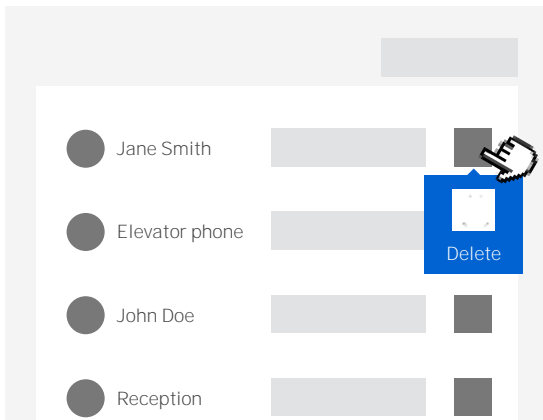
Select the **Confirm** button to finalise the additions.

Add more if desired.



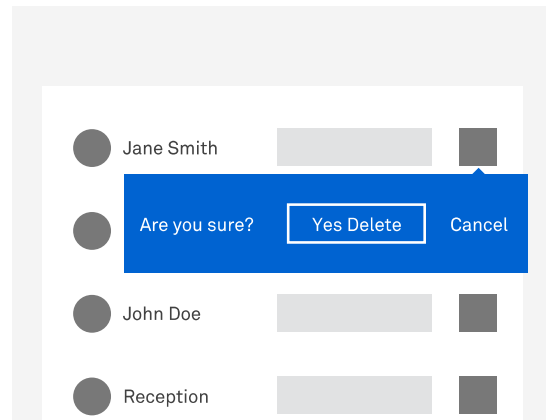
4. View your users

Visit the **Users** page again to see the new additions.



1. Find the user

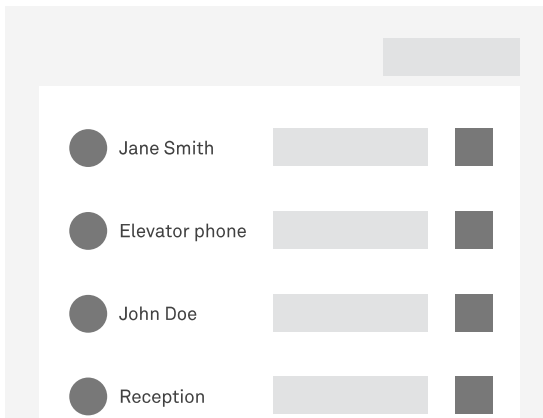
From the user list page, select the three dots on the right of the user you would like to remove.



2. Confirm the removal

Select the **Delete** option and confirm with the **Yes Delete** button.

This user slot will now be available for you to assign to a different user.



1. Find the user

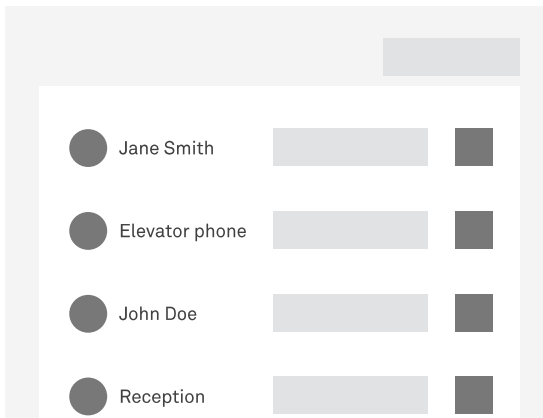
From the **Dashboard** or **User list**, select one of your users.



2. Change personal information

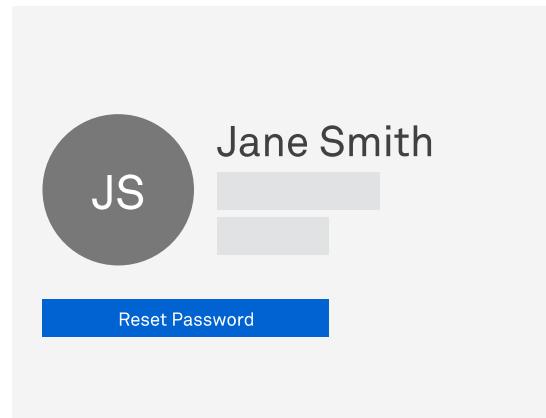
Select the pencil icon to edit the associated name or email address.

Select the dropdown site selector to update the user's location where available.



1. Find the user

From the **Dashboard** or **User list**, select the relevant user.

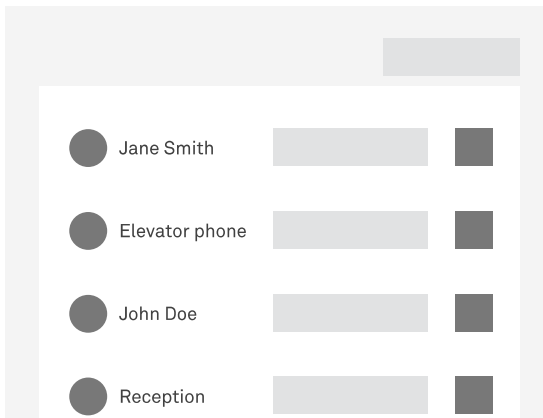


2. Reset the password

Select the **Reset Password** button to initiate the change flow.

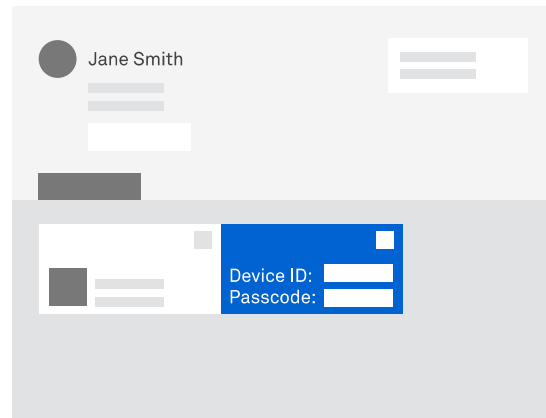
3. User will receive an email

The associated user will receive an email that provides a link to set up a new password.



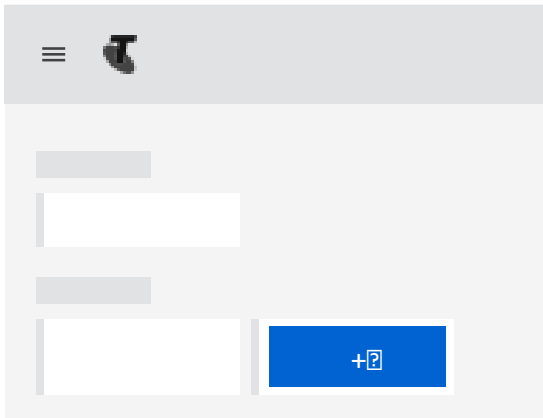
1. Find the user

From the **Dashboard** or **User list**, select the relevant user.



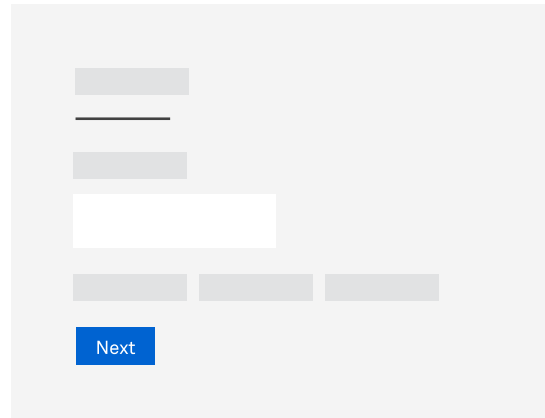
2. View the device information

Select the relevant device to view a popup with device information.



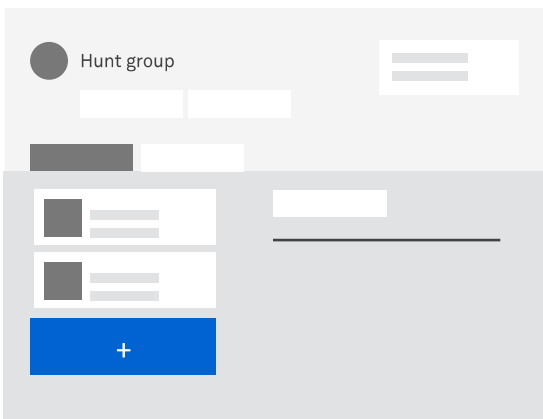
1. Navigate to services

- Select hunt groups from the menu and select **Configure hunt group** from an available slot.



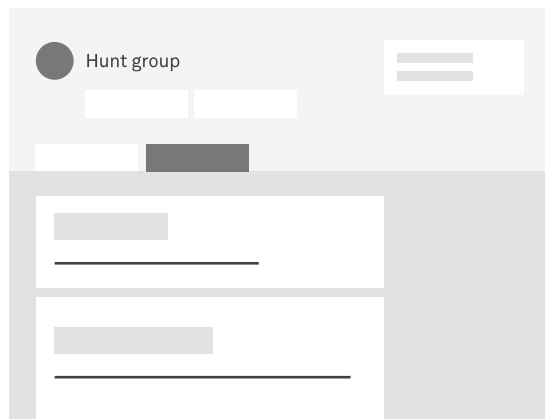
2. Provide details

- Enter the requested information about the hunt group.
- Pick a distribution type for how you want calls routed. Use the visuals for more details.



3. Add members to the group

- Search or select an existing user to add them to the hunt group.
- You can re-order the list by dragging, if needed.



4. Manage additional settings

- From the settings tab, manage how calls are routed depending on different scenarios.

What is a cutover?

A cutover is the process of moving your existing phone service to Telstra Collaboration.

Do I need to do a cutover?

If you've ordered new services, these should already be active so you won't need to perform a cutover.

If you have an existing phone service set up, this will still be active until you perform a cutover.

When should I cut over?

Once you've completed configuring all your users and calling settings, you're ready to cut over your services.

You will need to ensure this is complete for each of your locations within seven days of activating your incoming calls.

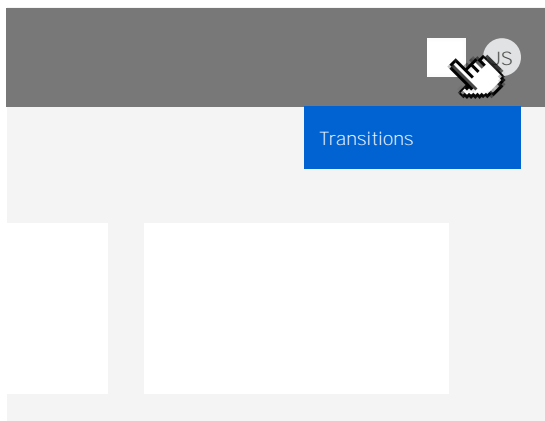
Don't forget you can always roll back the cutover and try again if you think something didn't work the first time. Find out how in the next section.

Need help?

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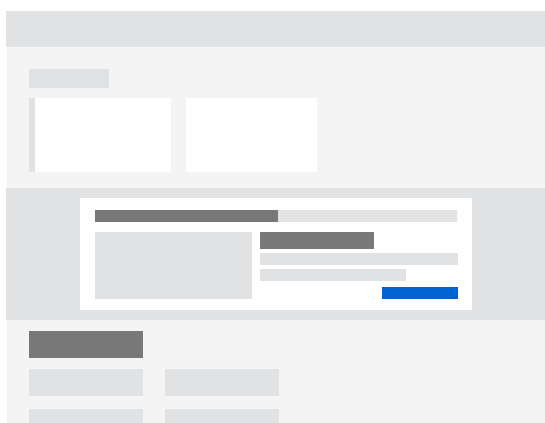
1. Navigate to transitions

- When you have an available transition (numbers awaiting transition), you'll be able to navigate to it from the **Notification** icon in the top menu.



2. Select the site whose phone service you want to activate

- Select the site you would like to transition from (numbers are moved across together).
- You can review the steps and affected numbers from this page.



3. Follow steps and test

- Click through each of the steps, following the relevant instructions for each one.
- If you experience issues, it's recommended you select **Rollback** to revert the changes. Doing so restarts your seven-day transition period.



4. Transition completed (with seven days to roll back, if needed)

- You can now use the new service.
- If you experience issues, you have seven days to roll back your changes. Select **Rollback** if you need to.

