



APPTIXTM
EMAIL • CALL • UNITE


Admin Guide


Apptix Unified Communications (UC) – Control Panel Setup

Apptix Live Support: [866-428-0128](tel:866-428-0128)

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 **FEEDBACK:** If you note mistakes in this guide, or identify procedures that are incorrect, we encourage you to email your feedback to usercontentfeedback@hostaccount.com. We continually strive to improve our customer support resources and your feedback is invaluable in assisting us with our goal to provide exceptional customer service.

 **PLEASE NOTE:** This Aptix Hosting Control Panel **Support Resources** section is updated periodically as new customer resources are added to assist customers with the use of their hosted services. You should occasionally check for updates to these support resources by logging into the Admin Control Panel and selecting the **Help & Support** menu option under the **Hosting** menu.

1. Introduction to Unified Communications (UC)

Unified communications (UC) is the integration of real-time communication services such as instant messaging, presence awareness, telephony, and video conferencing with non-real-time communication services such as email and integrated voicemail.

UC is not a single product, but a set of products that provides a consistent unified user interface and user experience across multiple devices and media types.

1.1 Additional Unified Communications Support Resources

Additional support resources for Unified Communications (UC) can be found at the Support section of our website and within the **Control Panel | Help and Support** link.

Because the Unified Communications solution encompasses many of Apptix's products, please utilize the support resources found in the various sections of our website and within the **Help and Support** link.

2. DNS Settings

If you have requested a new Internet domain name, it may take up to 48 hours for that registration to propagate through the Internet. Your new Apptix, Inc. email accounts will already be programmed with the new domain's name; however, email will not start flowing to your Apptix, Inc. account until the DNS changes update over the Internet.

If your domain name is registered through another company, and you are not transferring hosting of your domain to Apptix, Inc., your order may be delayed for up to 24 hours while Apptix, Inc. verifies the validity of ownership for your domain. This is a necessary security measure which is required to maintain the proper functioning of our email system.

2.1. Inbound Mail DNS Settings

Customers who have not purchased their domain/DNS service from us (and plan to use their existing DNS provider) must configure the following two "MX" entries on each of their Domain Name Servers, which they plan to use with the mail system.

MX Record:

Server1.inboundmx.com (preference 10)

Server2.inboundmx.com (preference 20)

CNAME Record:

Create a new CNAME record for Autodiscover, and point the record to:
autodiscoverredirect.collaborationhost.net.

For example: if your domain name is "abc.com," your CNAME record will be called AUTODISCOVER.abc.com, with a "target host" of "autodiscoverredirect.collaborationhost.net"

TXT Record:

v=spf1 include:collaborationhost.net ~all

2.2. Office Communication Services (OCS) DNS Settings

In order for your Web Conferencing service to function properly with external attendees, some DNS changes will need to be made to your domain name(s).

If your domain name(s) is registered through another company the following DNS changes will need to be made:

A Record:

Sip.<yourdomain.com> pointing to IP Address **216.166.12.186**

SRV Record:

Service=**sip**

Protocol=**_tcp**

Port=**5061**

Host Offering Service=**sip.<yourdomain.com>**

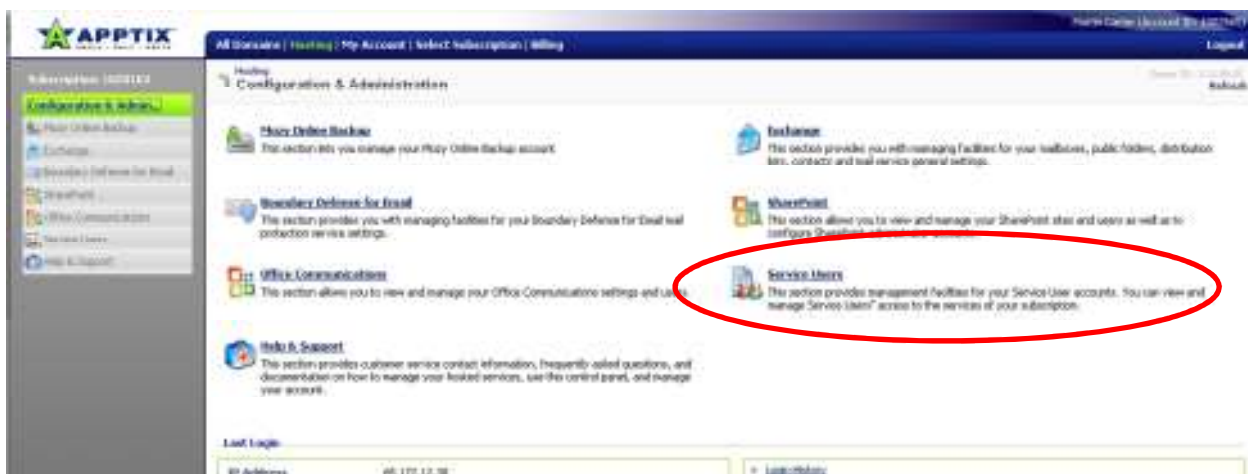
If Apptix hosts the DNS for your organization, all of these modifications will be made on your behalf.

3. Configure Your Unified Communication Services and User Accounts

3.1. Create User Accounts

Follow the steps below to create your Unified Communication User Accounts.

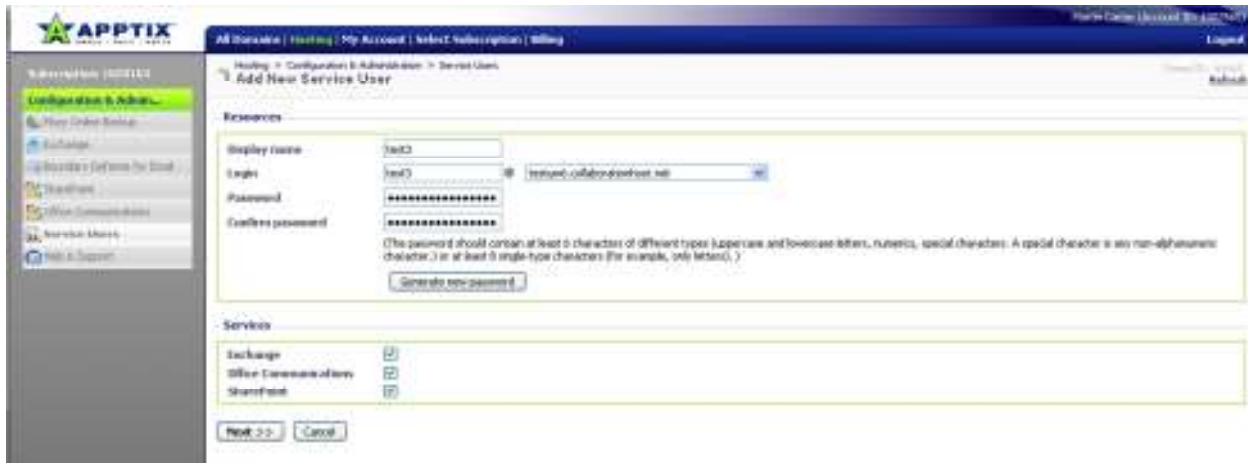
1. Log into the Control Panel using the account name and password provided in your Welcome Letter. Note that this is your overall company account and password, and that each individual mailbox/account will have its own unique login ID (the user's email address) and password.
2. On the top menu bar, insure that **Hosting** is selected, and click [Service Users](#).



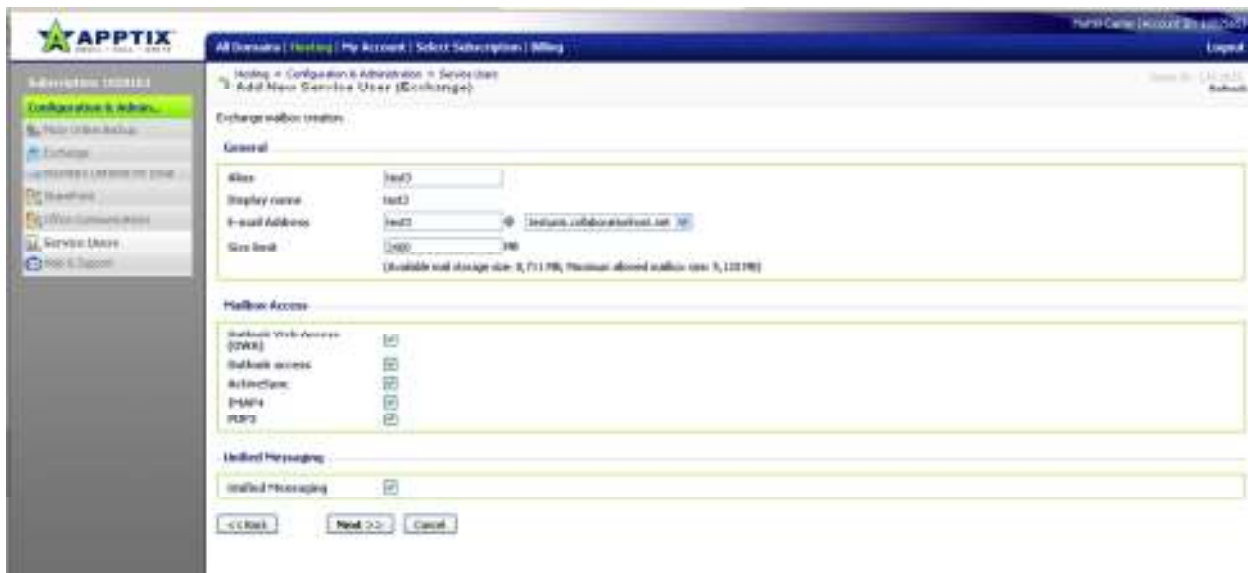
3. Click on the **[Add New Service User]** button.



4. Enter the user's **Display Name** (typically Firstname Lastname).
5. Specify the **Login ID** for the user (typical format is firstname.lastname). If more than one domain name has been enabled for this account, you can select the domain name for this user using the drop down list. Note that the Login ID is typically the same as a user's email address so that it is easier to remember and guaranteed unique.
6. Enter a **password** or click the **[Generate new password button]** to have the system create a password for you.
7. Check the boxes (**Exchange, Office Communications, and SharePoint**) the user will have access to.



8. Click the **[Next]** button.



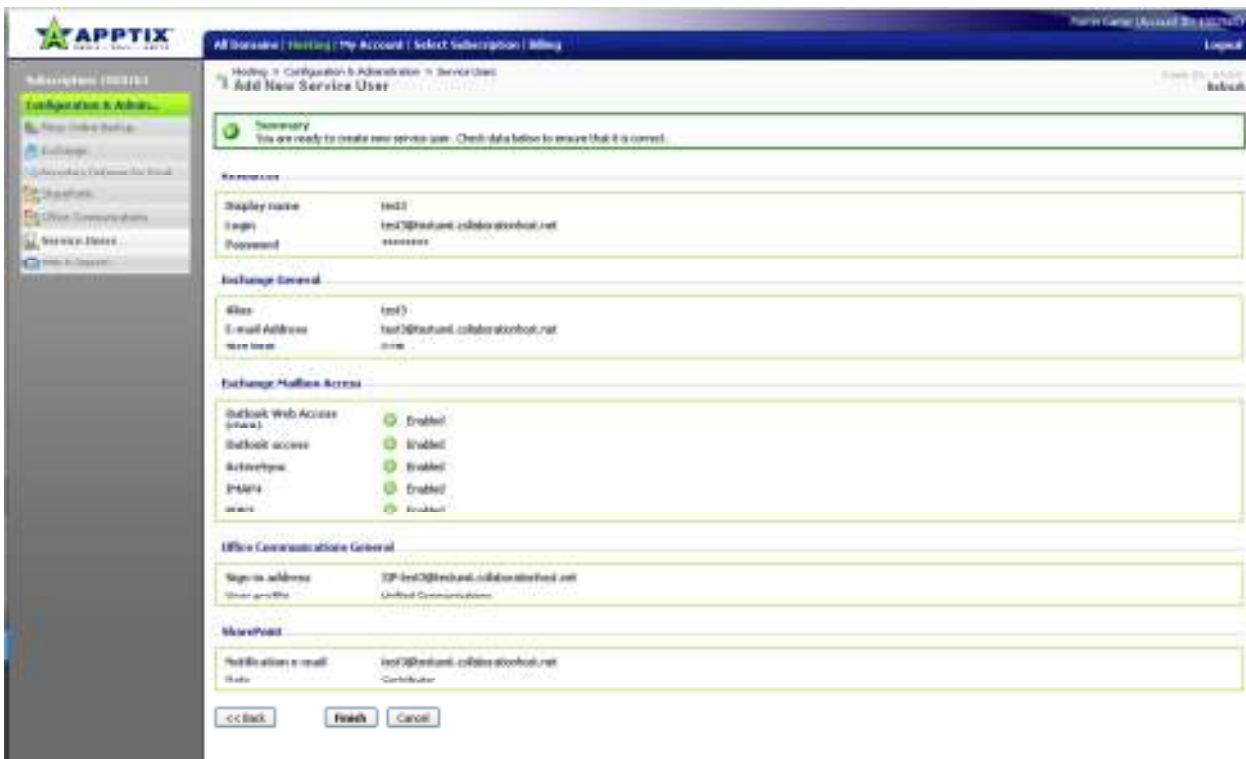
9. The user's email address and Display Name are carried over from the previous screen, but you can edit them if you wish. Ensure that the domain selected from the drop-down list is correct—this will be the user's primary email address (the "from" address on all emails). Additional email aliases for this mailbox can be added later if necessary.
10. Edit the amount under **Size Limit** to whatever storage limit this mailbox should have.
11. Ensure that you check the boxes next to each service/feature that this mailbox should have enabled.
12. Check the **Unified Messaging** check box.
13. Click the **[Next]** button.



14. The OCS sign-in address is carried over from the **Service Account** screen, but you can edit it if you wish. Ensure the domain selected from the drop-down list is correct.
15. The **User profile: Unified Communications** is the only profile available.
16. Click the **[Next]** button.



17. Choose the proper SharePoint Role the user should have. The available options are: **Reader**, **Contributor**, **Web Designer**, and **Administrator**. You can also create custom roles should you desire.
18. Click the **[Next]** button.

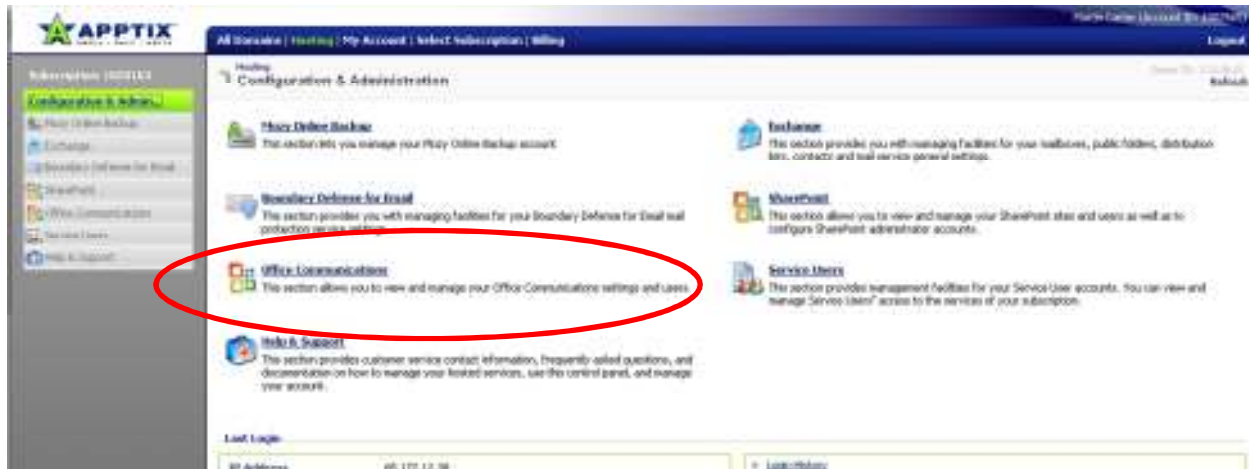


19. At the **Summary** screen review all of the settings to ensure they are correct. If something needs to be changed, you can press the **[Back]** button. User settings can be modified after the account has been setup.
20. Click the **[Finish]** button, once everything is correct.

3.2. Assign Phone Numbers to Users

Follow the steps below to assign available phone numbers to your Unified Communication users.

1. Log into the Control Panel using the account name and password provided in your Welcome Letter. Note that this is your overall company account and password, and that each individual mailbox/account will have its own unique login ID (the user's email address) and password.
2. On the top menu bar, insure that **Hosting** is selected, and click the **Office Communications** icon.



3. To view the available phone numbers for your organization, click on [Phone Numbers](#).



4. This is what the available phone number screen looks like.



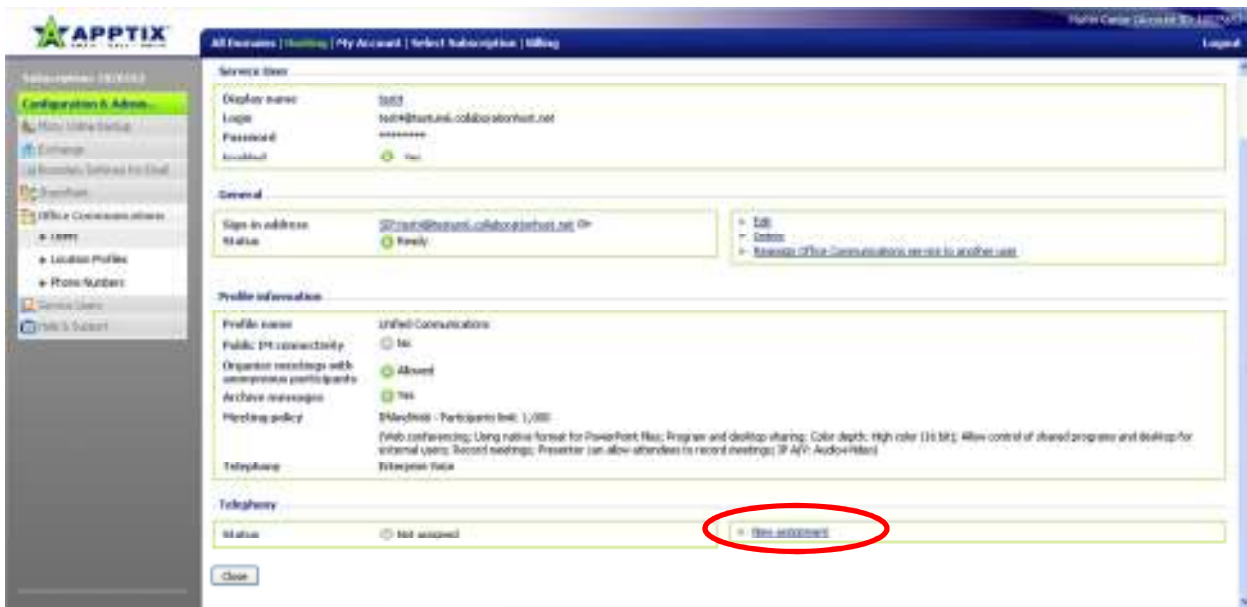
5. Click on [Users](#) on the left, or from the main page.



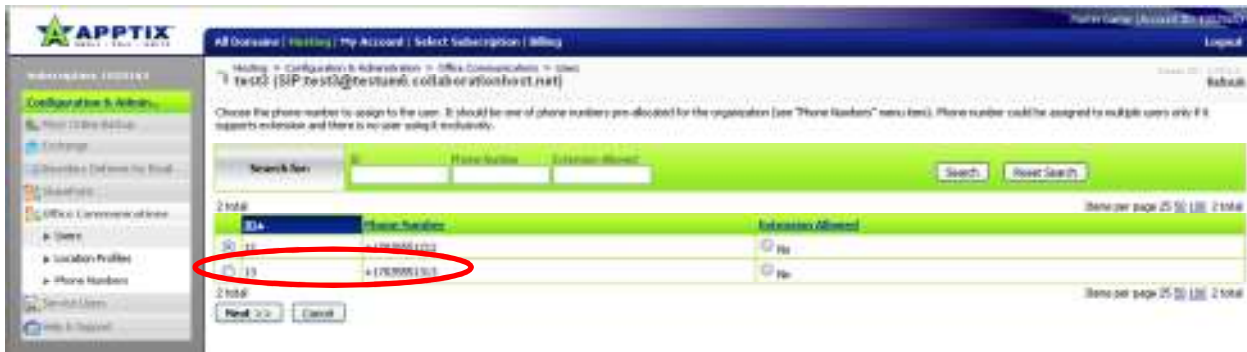
6. Click the [User](#) to configure the Unified Communication service for.



7. From the **Telephony** section on the bottom of the page, click [New assignment](#).



8. Choose the available phone number to associate with the user.



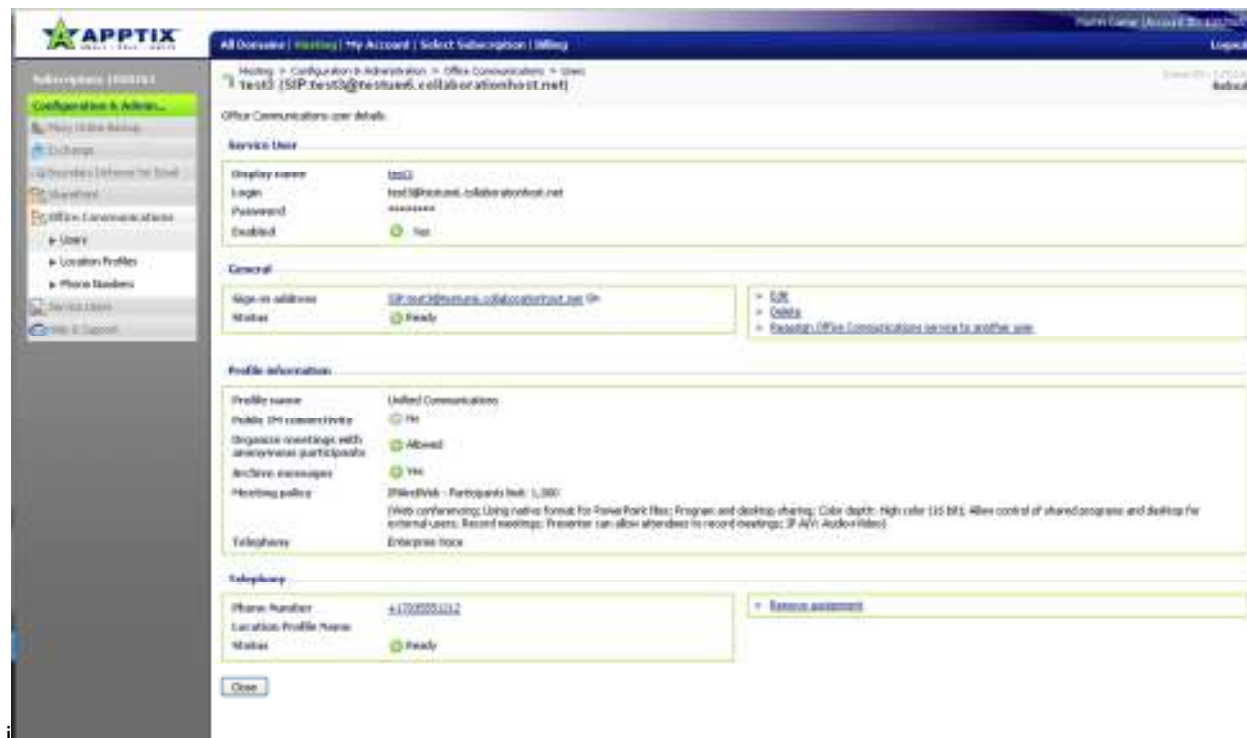
9. Click the **[Next]** Button.

10. The **Location Profile** is not currently being utilized, so leave the setting to **None**.



11. Click **[Finish]**.

12. The correctly configured user account will look similar to this.

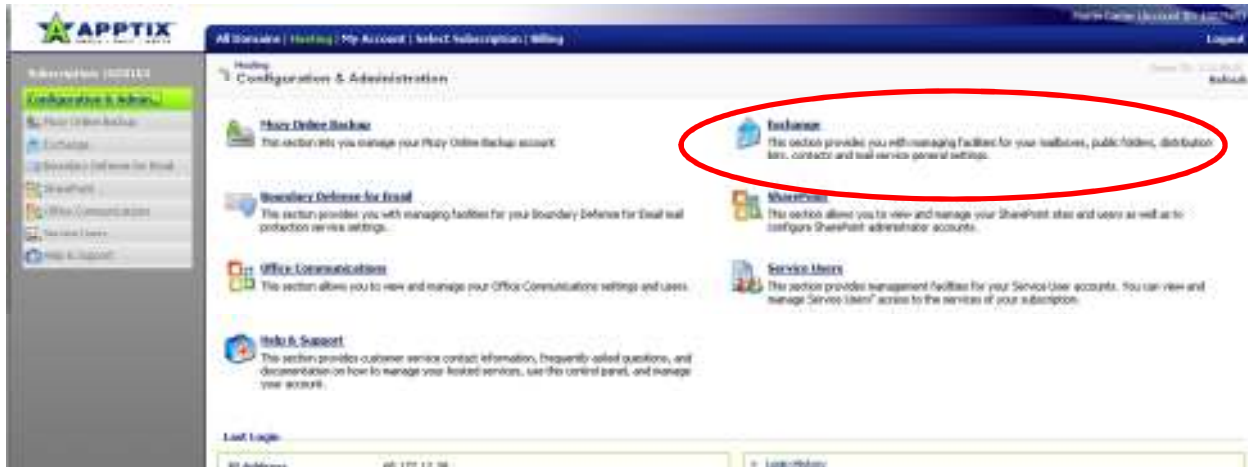


13. Click **[Close]**.

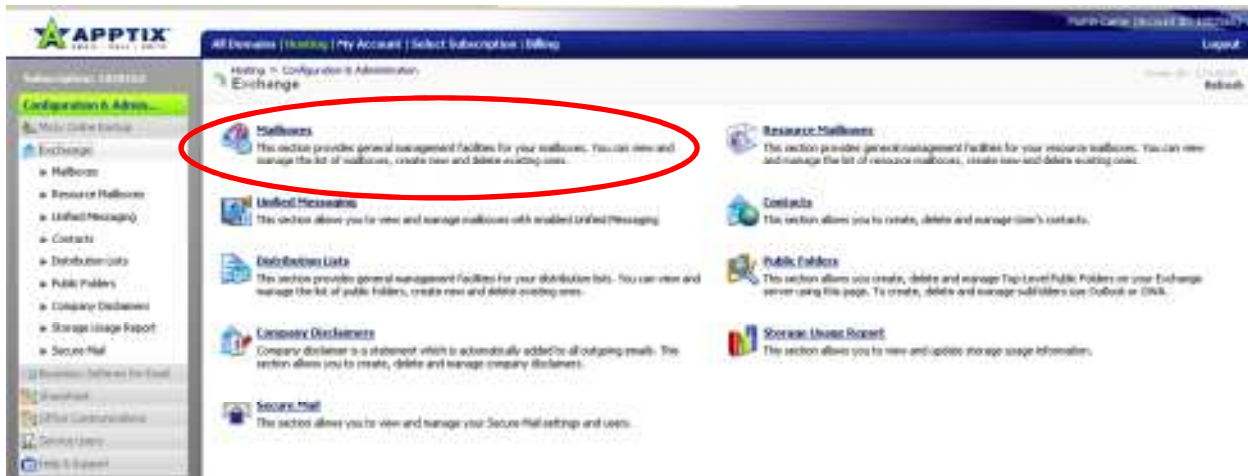
3.3. Enable Voice Mail for the User

Follow the steps below to enable voicemail to your Unified Communication users.

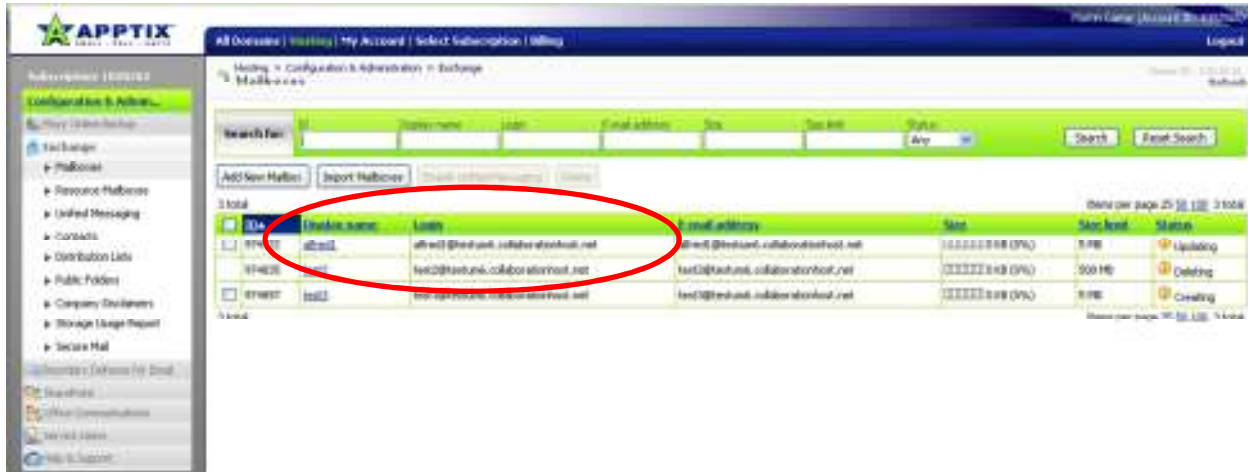
1. Log into the Control Panel using the account name and password provided in your Welcome Letter. Note that this is your overall company account and password, and that each individual mailbox/account will have its own unique login ID (the user's email address) and password.
2. On the top menu bar, insure that **Hosting** is selected, and click the [Exchange](#) icon.



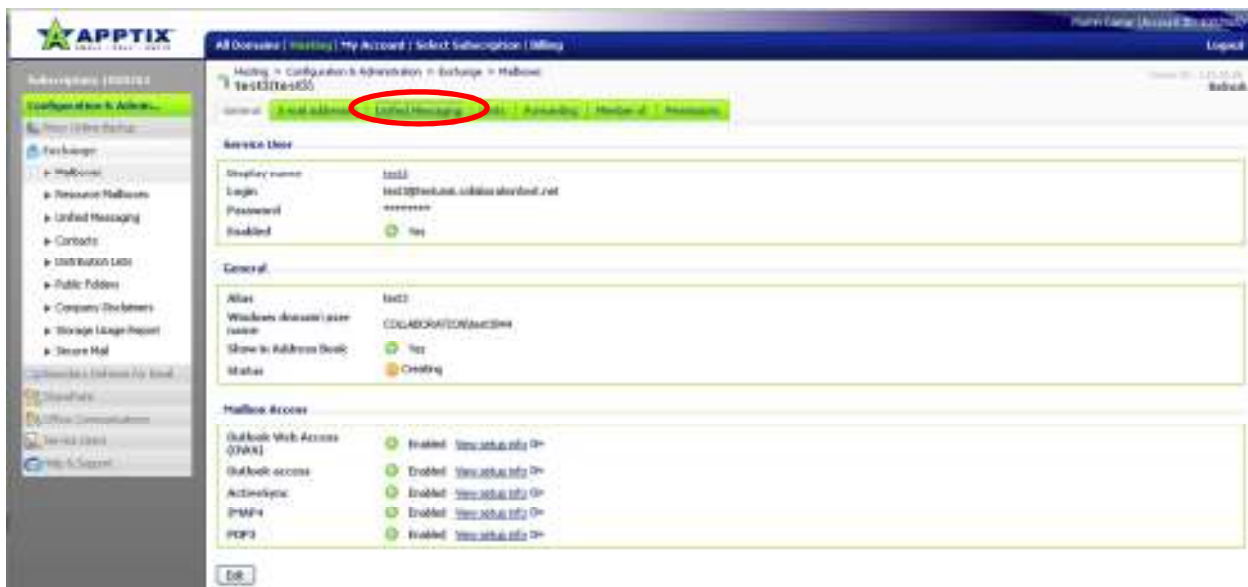
3. Click on the [Mailboxes](#) icon.



4. Choose the user account you want to enable voicemail for.



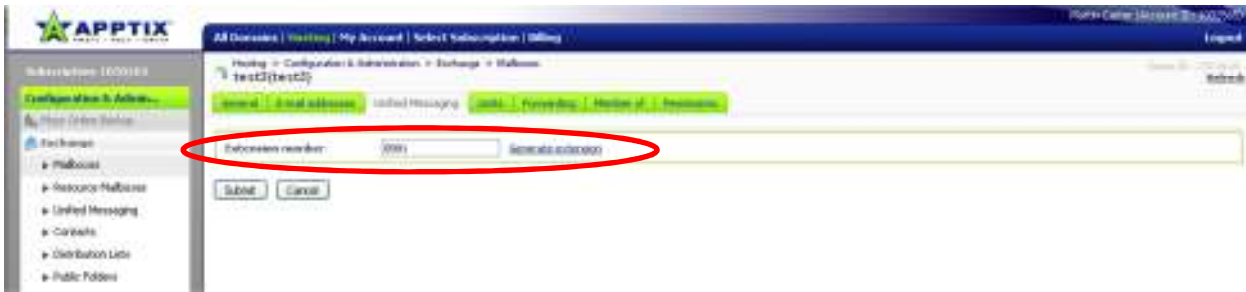
5. Select the **Unified Messaging** tab across the top of the screen.



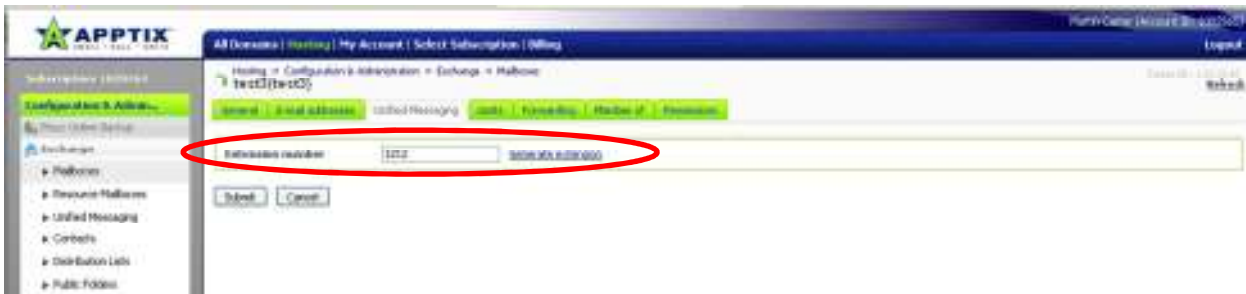
6. Click on **[Enable]**.



7. The **Extension** will auto-generate an extension to use to access the user's voicemail. This auto-generated extension begins at 0000 and proceeds numerically. This can be modified to something more recognizable for the user (e.g. the last 4 digits of their phone number.) should you wish.



Auto-generated extension

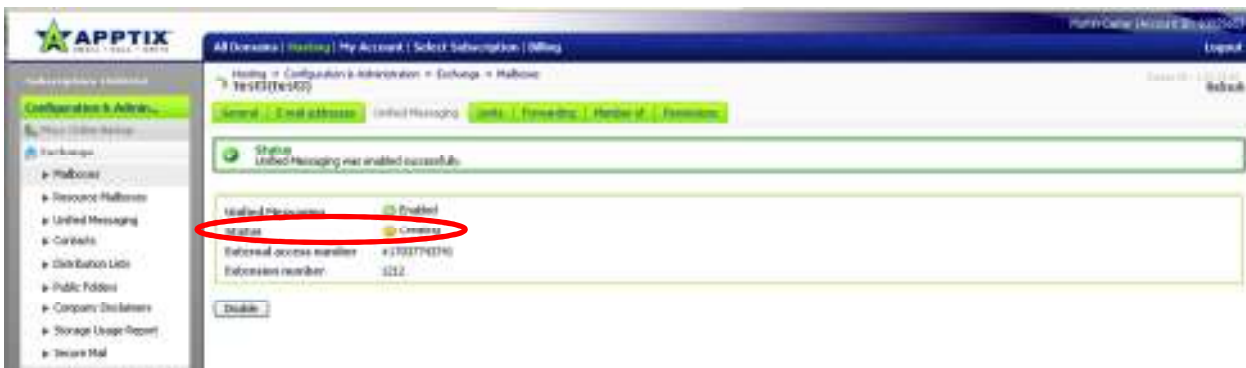


Custom extension

8. Click **[Submit]**.



9. The status will initially show as **Creating**. Once the voicemail is created, the status will change to **Ready**.



10. Please notify the users of the access number as well as their personal extension.

11. Upon first logging into the system, the users will have to create a passcode to access their voicemail.

3.4. Download and Install Outlook & Entourage

Your subscription to Apptix includes a fully-licensed copy of Microsoft Outlook. From the **Help & Support** menu in the control panel, you can download Outlook using the [Outlook Configuration Tool| Outlook & Entourage Download](#) link under Microsoft Exchange. Instructions for manually configuring your profile are in the Getting Started Hosted Exchange User guide, see Links to Documentation below.

3.5. To Access Outlook Web Access

Outlook Web Access can be accessed from the following URL:

<https://mail.apptix.net>

3.6. Download and Install Outlook Communicator

The Office Communicator, Live Meeting, and Outlook Add-In desktop PC software are all installed by downloading and running the installer at http://www.apptix.com/downloads/ocs/ocs_setup.exe.

Detailed instructions can be found in the **Control Panel | Help & Support** or from the Support section of our website:

- [OCS Client Software Installation – Quick Start Guide](#)

4. Create SharePoint Site

Please be advised that, for your convenience, a default SharePoint site is automatically created for you, using the domain name that you provided during signup (e.g.: <http://mydomain.com>), however, you may not want to use this domain name as your SharePoint Site, instead, you may want to use a sub-domain (eg: <http://intranet.mydomain.com>) etc.

Before creating users and uploading data into the existing SharePoint Site, please verify that the site is indeed using the correct domain name you would like to use for your final SharePoint Site.

If the site that was automatically provisioned does not suit your needs you can delete the site, add the correct domain/sub-domain, and create the new SharePoint site. Click on SharePoint > Sites>Check the box to left of the site and then click Delete on the right. Add the new Domain or Sub-domain in Domain Administration. Follow the instructions below for creating a new site.

4.1. To Manage SharePoint Site(s):

Using the credentials provided above, you may access the Control Panel by [typing https://cp.collaborationhost.net](https://cp.collaborationhost.net) into your Web browser. From the main screen, select **SharePoint > Sites**. You will see the site that was automatically created for you, and the domain name associated with it.

Following are instructions for creating a SharePoint site. See above to create SharePoint users.

Summary Instructions for Creating a New SharePoint Site

Log into the Control Panel using the account name and password provided above. Note that this is your overall company account and password, and that each SharePoint user will have their own unique login ID and password.

- On the top menu bar, ensure that Hosting is selected, and click SharePoint in the left menu.
- Select Sites, and click the Add New Site button.
- Specify the domain or sub-domain you would like your new SharePoint site to use.
- Decide and select whether to create a new user or choose an existing user to be the administrator of this new SharePoint site.
- Select a template on which your new SharePoint site will be designed, and denote the default storage quota.
- Select the preferred language (if available for your account) and the notification email address at which to receive administrative notifications/updates. This email address will receive a confirmation email with the initial SharePoint site login information.
- Click the Finish button.

You will see a list of available SharePoint sites. The In Sync column will show Yes when your new SharePoint site is ready to use. Once your site is In Sync, you can begin to add users.

Detailed instructions can be found in the **Control Panel | Help & Support** or from the Support section of our website:

- [SharePoint – Admin Guide](#)