Avaya Access Guide
For Company and Sold To Administrators

Purpose
This document provides instructions on how to perform the tasks of a Company or Sold To Administrator:
- Monitor and approve your company’s user requests that required approval.
- Update the profile for a user in your company when needed.
- Manage who has access to your Sold To location information.

Audience
Customers and Partners who are designated as an Avaya Access Company or Sold To Administrator

Prerequisite
Before you begin:
- You must be registered as an Avaya Access Company or Sold To Administrator
- You should understand the responsibilities of your role as a Company or Sold To Administrator for your company by clicking here.

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Avaya Access Company Administrator and Sold-To Administrators

Company Administrator
A Company Administrator is responsible for monitoring and approving requests from their company users.

- Starting November 2020, Company Administrators also have the option for moving the Sold To-s showing on their own profiles from “Available” to “Your Numbers / Administered”.
- Company Administrators manage all users’ registration and on-boarding requests for their Company or Link id.
- Administrators can only approve requests for users within their Company. Once a Company Admin is established, they will be approving all users and related activities. Request Types for the Admin Roles include:
  - Approve / Decline New Registrant Requests (New Users)
  - Approve / Decline Sold To requests for users within his Company
  - Pre-Register New Users
  - Deactivate Users
  - Approve / Decline Email Address Change for users within his Company.
  - Approve / Decline User Access Type for users requesting administrator permissions.
  - User's Association to Company for users who originally registered as "No Relationship" and later request to be a user of your company.
- A Company can have more than one Company Administrator and is a good practice for Companies to have in fact two Company Administrators, in case one is not available.
- Company Administrator also has Sold To Administrator capabilities

Sold-To Administrator
A Sold To Administrator is responsible for assigning who can access their Avaya company account information by Sold To location. Granting access to your account information allows access to Avaya tools and downloads specific to a location on your company’s behalf.

The Sold To Administrator is responsible for the following tasks:

- Approving requests to "Add Sold To Association"
- Proactively assign (or remove) access to Sold To locations for users in your company.

Access Your Profile and Administrative Dashboard

<table>
<thead>
<tr>
<th>Step</th>
<th>Activity</th>
<th>Action</th>
</tr>
</thead>
</table>
| 1    | Login to Avaya Access and go to your profile | Enter the following url: [https://sso.avaya.com](https://sso.avaya.com).  
- If you are not already logged in, the Login page is displayed: Enter your e-mail address and password, then click SUBMIT.  
**OR**  
- From the Avaya Support site: [https://support.avaya.com](https://support.avaya.com):  
  - If you are not already logged in:  
  - Enter your e-mail address and password, |
### Activity

<table>
<thead>
<tr>
<th>Step</th>
<th>Activity</th>
<th>Action</th>
</tr>
</thead>
</table>
|      |          | – Then click LOG IN.  
|      |          | – Click “My Information -> SSO Login Profile”.  
|      |          | **Outcome:** Your profile information is displayed under the tab with your name, along with a Toolbox section that allows you to make changes to your profile.  
|      |          | If you forgot your password, go to Step 2.  
| 2    | Reset your password | From [https://sso.avaya.com](https://sso.avaya.com) url, click “Forgot Password”  
|      |          | Complete the two (2) Avaya Password Recovery steps:  
|      |          | – Step 1: Enter your e-mail address, then click SUBMIT.  
|      |          | – Step 2: Answer your security question, then click SUBMIT.  
|      |          | You will receive an e-mail with a temporary CODE to establish a new password, click the “Change Password” link. This link is only valid for 24 hours.  
|      |          | – Complete the Avaya Login Information, then click LOG IN.  
|      |          | **Outcome:** Your Avaya Access profile is displayed. |
Managing Your Avaya Access Profile

Administrators can see the options to manage your profile by clicking on “User Profile”.

Click “User Profile” to display the following sub-menu items:

- **Edit My Profile** – Update your profile information and permissions.
- **Manage My Sold Tos** – Manage your own Sold To account access.
- **E-Notification** – Subscribe to E-Notifications.

User Management

As a Company Administrator, you are accountable to approve and maintain the list of users that have access to your Company or Link ID.

Click “User Management” to display the following sub-menu items under User Management:

- **Approval Request** – Monitor and approve user requests that require approval.
- **Register New User** – Pre-register a new user from your company.
Approval Requests

Approval Requests – Basic Navigation

From the User Management tab, select Approval Request.

<table>
<thead>
<tr>
<th>Item</th>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
</table>
| 1    | All Requests and My Request tabs | • “All Requests” tab displays all requests, whether they are new or being worked. The state of the request is identified by the Action associated with the request.  
• “My Requests” tab displays the requests that you have taken ownership for working (approving or rejecting). |
| 2    | Sort  | Requests can be sorted by date or any of the headers by clicking on the arrow to sort in ascending or descending order. |
| 3    | Request Type details | Click on the Request Types to display the details of the request. |
| 4    | Action | • The Action section on the “All Requests” tab displays the state of the request:  
  − Claim – Identifies new requests that need to be claimed and worked (approved or rejected) by an administrator.  
  − Claimed – Identifies requests that have been claimed already.  
  − Unclaim – Identifies requests that have been claimed by you or another administrator. Clicking UNCLAIM allows you to move the request back to an Action type of “Claim” so you or another administrator to then Claim and work the request.  
• The Action section on the “My Requests” tab allows you to select whether you want to approve or reject the request. |
### Item 5: Pagination

- Page numbers display the page you are on and the total number of pages for the list results.
  
  a) To go to a specific page, enter the page number and hit the “Tab” key.

- Previous and next arrows are displayed when there is more than one (1) page of results. Click on the left arrow to page forward or right arrow to page back.

- “Results Per Page” can be selected to display more than 5 results per page.

### Item 6: Show Primary Tasks

A Company Administrator can display all the requests for their company, including requests for the Sold To Administrator. Deselect “Show Primary Tasks” from the All Requests tab.

### Item 7: Request Filters

Allows additional specific filters to be selected / implemented to faster find specific request/s.

## Approval Requests – Request Details

From the All Requests and My Requests tab, click on the Request Type link to display an overlay screen with the Request Details.
Approval Requests – All Requests

The “All Requests” tab is used to monitor all new requests and to make sure all requests are being worked in a timely manner.

<table>
<thead>
<tr>
<th>Step</th>
<th>Activity</th>
<th>Action</th>
</tr>
</thead>
</table>
| 1    | Claim a request in order to approve/reject the request | From the All Requests tab, the Action must be “Claim.”  
   a) Click CLAIM.  
   Outcome: The request is moved under your My Requests tab. You now own the request and are responsible for approving or rejecting the request.  
   The Action for the request on the All Requests tab will change to “Unclaim.” |
| 2    | Unclaim a request to move it back to an Action type of “Claim” for you or another administrator to then Claim and work the request | From the All Requests tab, the Action must be “Unclaim.”  
   a) You do not have to own the request to “Unclaim” it. To view who currently owns the request, click on the Request Type link to view the Request Details.  
   b) Click UNCLAIM.  
   Outcome: The request will be removed from the My Requests list of whoever owned the request prior you un-claiming the request.  
   The Action for the request on the All Requests tab will change to “Claim” which then allows you or another administrator to then Claim and work the request. |
Approval Requests – My Requests

To approve (or reject) a request, you must move the request to your list of items to approve/reject under “My Requests.”

<table>
<thead>
<tr>
<th>Step</th>
<th>Activity</th>
<th>Action</th>
</tr>
</thead>
</table>
| 1    | Move a request to your My Requests list | From the All Requests tab, click CLAIM.  
**Outcome:** The request is moved to your My Requests list. The “Action” on the All Requests tab will change to Unclaim. |
| 2    | View the request details | From My Requests, click on the Request Type for the item you want to view.  
 a) An overlay screen of the Request Details is displayed for you to verify the user’s request information.  
 b) Click the “X” to close the Request Details.  
**Outcome:** You are returned to the list of My Requests. |
| 3    | Approve/reject the request | From the Actions for the request:  
 a) To approve the request, click in the box under the “✓” column.  
 b) To reject the request, click in the box under the “X” column.  
 c) Click SUBMIT.  
**Outcome:** The request will be remove from the Approval Requests lists for All Approvals and My Requests. The user will receive an e-mail with the status (approved or rejected) of their request.  
**NOTE:** if a registered user is requesting a change to their e-mail address; *do not approve the request if the user is changing companies*. The user will need to re-register with their new company account information. You will need to inactivate the user’s login that is in your company.
Pre-Register New User

Administrators can pre-register a user for Avaya Access.

New User Contact Information

(To begin the onboarding process please fill out the information below)

<table>
<thead>
<tr>
<th>Relationship with Avaya</th>
<th>User Access Type</th>
<th>Company ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customer</td>
<td>User</td>
<td>7778320228</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>First Name</th>
<th>Last Name</th>
<th>Country</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>United States of America</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Address Line 1</th>
<th>Address Line 2</th>
<th>State</th>
<th>ZIP Code/Postal Code</th>
<th>City</th>
<th>Work Phone (To verify your company)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
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<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Fax Number</th>
<th>Reason For Pre Registration</th>
<th>Email Address (This will be your username)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### Step 1: Pre-Register a user from your company

From the User Management tab, the Company Administrator has to select “Register New User.”

a) Complete the online pre-registration form to on-board a New User.

b) Click SUBMIT.

**Outcome:** A message is displayed confirming that the new user registration was successful.

- The pre-registration doesn’t require any approval.

Once submitted, the pre-registered user will receive an e-mail containing a link and asking the pre-registered user to complete the registration process. The user will need to setup a password, security question and answer, and accept the site Terms of Use.

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**Search**

Select the Search option to display the following sub-menu item under Search:

- **Users** – Search for a user in your company, view their profile, and even perform some profile changes on their behalf.
User Profile Search

**Step 1**  
**Activity:** Search for a user  
**Action:**  
From the Search tab, select “Users.”  
a) Enter search criteria. You can search by email address or First / Last name.  
b) You can also apply filters for user types, by checking the proper boxes.  
c) Click SEARCH.  
**Outcome:** The search results are displayed.  
If results could not be found based on the search criteria entered or the user does not belong to the same company, a message is displayed: “No User exists”

**Step 2**  
**Activity:** View a user’s profile  
**Action:**  
From the list of search results, click “View” for the user’s profile you want to view.  
**Outcome:** The user’s profile is displayed.  
You’ll also be able to see the users’ status:  
d) ‘Pending approval’: user is in the approval queue under ‘User Management’  
e) ‘Pre-registered’, user was pre-registered by a Company Administrator or an Avaya user and hasn’t completed the registration yet.  
f) If nothing is displayed between brackets, the user is Active.
<table>
<thead>
<tr>
<th>Step</th>
<th>Activity</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td><strong>TEST TETDST</strong></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Company: Diocece of St Josaphat in Parma</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Country: United States of America</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Work Phone: 645656565656</td>
<td></td>
</tr>
<tr>
<td></td>
<td>User Name: <a href="mailto:testqueuecxp@yopmail.com">testqueuecxp@yopmail.com</a></td>
<td></td>
</tr>
<tr>
<td></td>
<td>User Id: tttedst</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Access Level: User</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Avaya Relationship: Customer (Pending Approval)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Member since: 09-Oct-2020</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>PRAVIN JAGTAP</strong></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Company: Diocece of St Josaphat in Parma</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Country: India</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Work Phone: 07756058041</td>
<td></td>
</tr>
<tr>
<td></td>
<td>User Name: <a href="mailto:issue66222dsds@gmail.com">issue66222dsds@gmail.com</a></td>
<td></td>
</tr>
<tr>
<td></td>
<td>User Id: jagtap56</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Access Level: User</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Avaya Relationship: Customer (Pre Registered)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Member since: 01-Oct-2020</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>NEWTEST VERONICA</strong></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Company: Diocece of St Josaphat in Parma</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Country: United States of America</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Work Phone: 423232323232323</td>
<td></td>
</tr>
<tr>
<td></td>
<td>User Name: <a href="mailto:ahegowy-6070@yopmail.com">ahegowy-6070@yopmail.com</a></td>
<td></td>
</tr>
<tr>
<td></td>
<td>User Id: nveronica</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Access Level: User</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Avaya Relationship: Customer</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Company field search</td>
<td>By searching using a wildcard ‘*’ you’ll be able to list all users registered under your Company</td>
</tr>
<tr>
<td>---</td>
<td>----------------------</td>
<td>------------------------------------------------------------------------------------------------</td>
</tr>
</tbody>
</table>

### Change a User’s Profile

With the exception of inactivating the user’s account, users should be managing their own profile. Any changes the user makes that requires approval will be sent to the administrator to approve and the user would receive an e-mail once their request has been processed.

However, an administrator does have the capability to can make the following profile changes on the user’s behalf:

- Change a user to SoldTo or Company Administrator
- Deactivate a user who is no longer in the Company
- Change user’s email address

**Note:** All administrators do not necessarily have access to change all the items in the Toolbox. Only the activate links can be changed.
<table>
<thead>
<tr>
<th>Step</th>
<th>Activity</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Search for a user</td>
<td>From the Search tab, select “Users.”</td>
</tr>
<tr>
<td></td>
<td></td>
<td>a) Enter search criteria.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>b) Click SEARCH.</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Outcome:</strong> The search results are displayed.</td>
</tr>
<tr>
<td>2</td>
<td>View a user’s profile</td>
<td>From the list of search results, click “View Profile” for the user’s profile you want to view.</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Outcome:</strong> The user’s profile is displayed.</td>
</tr>
<tr>
<td>3</td>
<td>Change the user’s profile</td>
<td>From the user’s profile:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>a) Verify that it is the correct User Profile.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>b) From the Toolbox for the user, select the available option to be changed on the user’s behalf.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>c) Complete the entries for the option selected.</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Outcome:</strong> A message is displayed confirming the change.</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Note:</strong> You may want to notify the user once a change has been made. Unlike when the user makes their own profile changes, they will not receive an online or e-mail confirmation for changes an administrator makes on their behalf.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Please note that you will not be able to make changes on users who are in status ‘Pending approval’ or ‘Pre-registered’</td>
</tr>
</tbody>
</table>

**Change a User’s Sold To Account Access**

![Change a User’s Sold To Account Access](image-url)
<table>
<thead>
<tr>
<th>Step</th>
<th>Activity</th>
<th>Action</th>
</tr>
</thead>
</table>
| 1    | Search for a user | From the Search tab, select “Users.”  
   a) Enter search criteria.  
   b) Click SEARCH.  
   Outcome: The search results are displayed. |
| 2    | View a user’s profile | From the list of search results, click “View” for the user’s profile you want to view.  
   Outcome: The user’s profile is displayed. |
| 3    | View the user’s Sold To lists | From the user’s profile:  
   a) Verify that it is the correct User Profile.  
   b) Click “View Sold To Numbers” under their profile.  
   Outcome: The user’s list of Available and Administered Sold To Numbers are displayed. |
| 4    | Add Sold To location(s) to the user’s list of accounts they can access | From the list of Available numbers:  
   a) If you only want to grant access to some of the Available numbers, then:  
      – Select the Sold To number(s) you are granting access to.  
      – Click GRANT SELECTION.  
   b) If you want to grant access to all of the Available numbers, then click GRANT ALL.  
   Outcome: The screen is refreshed and the Sold To numbers you granted access to will move from the Available numbers list to Administered. |
| 5    | Remove the user’s access a Sold To location(s) | From the list of Administered numbers:  
   a) If you only want to remove access to some of the Administered accounts, then:  
      – Select the Sold To number(s) you want to remove for the user’s list.  
      – Click REVOKE SELECTION.  
   b) If you want to remove access to all of the Administered numbers, then click REVOKE ALL.  
   c) Once you click Revoke Selection or Revoke All, a message is displayed: “Are you sure you want to remove these Sold To(s)?” Click OK.  
   Note: Partners could see Sold To accounts in their list that are marked as “Derived.” To remove these from the user’s list, you would to raise a ticket in OneCare portal.  
   Outcome: The screen is refreshed and the Sold To numbers you revoked will be removed from the list of accounts that user can access. |
Tools

Click “Tools” to display the following sub-menu items under Tools:

- **Sold To User Association** – Assign Sold To account access to a specific user(s) in your company.
- **Copy Sold Tos – Users** – Copy the list of Administered Sold Tos from one user to another user in your company.

**Sold To User Association**

Assign Sold To account access to a specific user(s) in your company. From the Tools tab, select Sold To User Association.
### Step 1
**Activity**: Select Sold To number(s)

**Action**: From the list of Available numbers:

- a) If you only want to grant access to some of the Available numbers:
  - Select the Sold To number(s) you are giving access to.
  - Click **TRANSFER SELECTION**.
- b) If you want to give access to all of the Available numbers, then click **REQUEST ALL**.
- c) You can click on “Show Details” to see the Sold To Names.
- d) You can also use the “search” box, if the list is large, and you are looking for specific a site. The search will work with Sold To Number or Sold To Name.
- e) Click on the right arrow at the bottom.

### Outcome:
The Sold To numbers you are giving access to will move from the Available numbers list to the list of Added accounts; and the step to Select Users is displayed.
## Step 2
**Activity:** Select user(s)  
**Action:**  
From the list of Available users:
  a) If you only want to grant access to some of the Available users, then:
     - Select the user(s) you are giving access to.  
     - You can filter by Basic User and Administrators  
     - You can also use the “search” box to find specific users.  
  b) If you want to give access to all of the users, then click TRANSFER ALL.  
  c) Click the red arrow at the bottom.  

**Outcome:** The users you are giving access to will move from the Available list to the list of Added users; and the button to “Complete Associations” is displayed.

## Step 3
**Activity:** Finalize associations  
**Action:** To finalize the associations of Sold Tos to the users:  
  a) Verify the Selected Sold To Numbers and the Selected Users; and modify the lists as needed.  
     - Modify the entries by selecting the item(s) you want to remove, then click REMOVE SELECTION; or  
  b) Go back to a previous step by clicking on the left arrow at the bottom  
  c) Click COMPLETE ASSOCIATIONS.  

**Outcome:** A message is displayed confirming the submission was successfully processed.

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## Copy Sold Tos – Users

Copy a user’s Sold To Administered list to another user’s profile in your company. From the Tools tab, select Copy Sold Tos – Users.

<table>
<thead>
<tr>
<th>Step</th>
<th>Activity</th>
<th>Action</th>
</tr>
</thead>
</table>
| 1    | Enter the user’s registered e-mail address | From “Copy Sold To Profile:”  
  a) Enter the user’s e-mail address you are copying from.  
  b) Enter the user’s e-mail address you are copying to.  
  c) Click SUBMIT.  

**Outcome:** A confirmation message will be displayed informing that the operation completed successfully.
### Appendix A – List of Request Types

<table>
<thead>
<tr>
<th>Request Type</th>
<th>Description</th>
</tr>
</thead>
</table>
| Add Sold To Association      | A registered user is requesting access to the account information for a Sold To location.  
• These are requests from users within your company.  
• Partner’s who need access to a customer’s Sold To account information must make the request to the customer directly. |
| Change User Access Type      | A registered user is requesting administrator permissions.  
• A request for a higher level of security from what the user currently has will go to an administrator for approval. For example, a request from a basic User wanting to be a Sold To Administrator will go to the Company Administrator for approval.  
• A change to downgrade the user’s access is automatically approved and will not go to an administrator for approval. For example, a Company or Sold To Administrator changes their User Access Type to a basic User. |
| Email Address Change         | A registered user is requesting a change to their e-mail address.  
• Do not approve the request if the user is changing companies. The user will need to re-register with their new company account information.  
• If the user is no longer associated with your company, you should inactivate their user account. Refer to “Change a User’s Profile” under Search. |
| New Registrant Approvals     | Registration or pre-registration requests for a new user to be setup with Avaya Access and permissions.  
• Pre-registrations completed by a Company Administrator (or Avaya Access Administrator) are automatically approved and will not go to an administrator for approval. |
| User’s Association to Company| A user who originally registered as having “No Relationship” defined with Avaya has submitted a request to be a user of your company.                                                                                   |