

MaxACD Release 7.1

Federation Guide Enterprise Deployments

This short guide gives an overview of configuring and using a Federated deployment of MaxACD 7.1. Most of this material also appears in the MaxACD 7.1 Deployment Guide and the MaxACD 7.1 New Features Guide. We are simply combining it here for your convenience.

During Deployment

While installing and configuring a Federated system, there are a few extra steps to take, as spelled out in the Deployment Guide.

In the Deployment guide, make sure that you perform the steps in the section "Federated Deployments."

Federation Support

When you order MaxServer with MaxACD, you can choose whether you want a Federated service or a regular service. Note that if you are ordering only MaxACD, without Altigen-hosted Skype-for-Business, you will automatically get a Federated version of MaxACD.

In order to use a Federated deployment of MaxACD, you must first configure the Federation feature in your Skype for Business deployment (if you are using your local Skype for Business). Those steps are beyond the scope of this document. For details on configuring your Skype for Business deployment for Federation, refer to the Microsoft documentation. One article that may be helpful:

<https://docs.microsoft.com/en-us/skypeforbusiness/set-up-skype-for-business-online/allow-users-to-contact-external-skype-for-business-users>

Note that MaxACD does not support Skype for Business Online Federated users.

In general, Federated users can perform all of the same call functions as local users would, with the following exceptions:

- A Federated MaxGroup Member cannot perform a consultative transfer to an outside number
- A call to a Skype for Business user who forwards the call to a Federated SIP URI will fail

If you configured your Exchange server in MaxAdmin, then you will receive voicemail messages as specified in the Exchange Integration Guide.

Additional Setup Steps Required for Federated Users

Perform the following one-time steps to prevent Federated users from getting popups when they are in a call or conference.

1. On the MaxACD server, open the LyncProxyMain.txt file that is stored under C:\AcdRoot\AcdProxy\log\.
2. Search for "Viewer@" in that file. You should find a SIP URI xxxViewer@xxx.
3. Copy that SIP URI.
4. For each Federated user, add that SIP URI as a contact to the user's Skype for Business client. Right click that contact and select *Change Privacy Relationship*. Change it to *Workgroup*.

Federation Does Not Work with Active Directory

Be aware that there are limitations within MaxAdmin when you have a federated MaxACD deployment.

Because Federation does not use Active Directory, the AD features within MaxAdmin are not supported. For example, you cannot upload AD users into the Service Hub and/or into MaxAdmin by searching your Active Directory users. You must enter users manually (or upload them from a .CSV file), as Custom users.

In addition, you cannot populate your Custom User Directories by simply searching for AD users; you must enter custom user entries or import Directory entries from a .CSV file.

Adding Users into a Federated Deployment

To add users into MaxACD, you can add them manually as Custom users or you can import them from a CSV file.

Adding Federated Users Manually

1. In MaxAdmin, switch to the *User* tab. Click **Add** below the user list.
2. Because you have a Federated deployment, you cannot click the *Search* button to search your Active Directory for a user. Users must be entered manually.

Enter the details for the user and click **OK**. Required fields have a red asterisk.

Custom User field	Description
First Name	The user's first name.
Last Name	The user's last name.
Password	Enter the MaxAgent password for this user; this password may be different from the user's Skype for Business password.
Line URI	The user's Line URI.
SIP URI	The user's SIP URI.
UPN	The user's User Principal Name (UPN).
Email	The user's email address.

You can then assign licenses to the custom users and add any further details.

Importing Federated Users into MaxAdmin from a CSV File

To import users from a CSV file, you must create the file must with the following format:

ADFS,firstname,lastname,password,lineuri,sipuri,upn,email

	A	B	C	D	E	F	G	H
1	adfs	firstname	lastname	password	lineuri	sipuri	upn	email
2	1	Frank	Underwood	12345	4085979299	sip:funder@altigen.com	funder@alti2019.com	frank@altigen.com
3	1	Robin	Wright	12345	4085979289	sip:robin@altigen.com	robin@alti2019.com	rwright@altigen.com
4	1	Doug	Stamper	12345	4085979292	sip:dougs@altigen.com	dougs@alti2019.com	dstamper@altigen.com
5	1	Carrie	Matheson	12345	4085979293	sip:carrie@altigen.com	carrie@alti2020.com	cmatheson@altigen.com
6	1	Saul	Brody	12345	4085979283	sip:saul@altigen.com	saul@alti2020.com	sbrody@altigen.com
7	1	Dana	Skully	12345	4085979291	sip:starbuck@altigen.com	starbuck@alti2020.com	dana@altigen.com

The .CSV file must contain a header row. Note that the *ADFS* column must be either 0 (for custom users) or 1 (for AD FS users).

1. On the *Users* tab, click **Add**.
2. Click **Browse** to browse to your CSV file.
3. Review the list of users in the *Users* tab. Users with a checkmark will be imported, so clear the checkboxes of any users that you do not want to import. Click **OK** to import the users

Populating Custom User Directories in a Federated Deployment

To add Federated users to a Custom Directory, you can import the list of users from a CSV file.

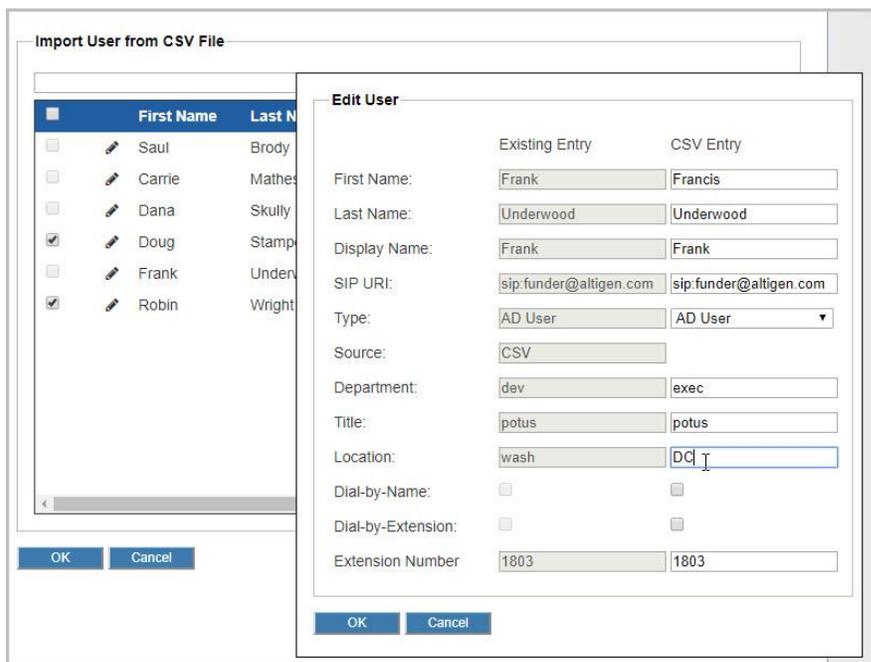
The CSV file should have the following format:

firstname,lastname,displayname,sipuri,department,location,title,extension,dialbyname,dialbyext,type,import

1. From the Sidebar, choose **AA/IVR**. Then select **Directories**.
2. Select the Directory that you want to populate from the list on the left.
3. Pull down the *Action* menu, choose **Import Users from CSV Files** and click **Go**.
4. Navigate to the CSV file and select it.
5. After a moment, the entries contained in the CSV file will appear on the screen. (Those entries with the Import field marked as *No* will not appear.) By default, checkboxes for any duplicate records will not be selected.

On this page you can sort the entries by any field, by clicking the column title (for example, to sort the list by the user's last name, click the Last Name column).

6. To import a user record, select the record's checkbox. If you do not want to import a record, clear the record's checkbox. If you cannot select a checkbox, that means that the record is a duplicate.
7. To edit the data in a record being imported, click the pencil icon for that record. A pop-up shows you both the current entry and the new data; only the new data fields can be edited. Click **OK** after making your changes.



8. After making your selections and editing records as needed, click **OK**. The selected entries are imported into the database and will appear in the Directory's member list.

Limitations

If you have Exchange Integration configured on-premise and you have configured voicemail notifications, those notifications will fail.