Clearspan[®] OpEasy[®] Advanced Provisioning Guide

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Clearspan® OpEasy® Advanced Provisioning Guide

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The following represents the revision history of this publication:

Overview

OpEasy is a tool that helps an administrator quickly and easily bring up a Mitel, Polycom, Panasonic and Cisco phone device within an Enterprise on the Clearspan platform and have it already for a specific user. When an administrator sets up a phone using profiles and templates in OpEasy, and designates a user for that phone, a unique configuration file is generated, which is loaded onto the phone when the phone starts up. The configuration file defines the lines and features that are enabled on the phone. Although this file is generated and stored on the Clearspan system, OpEasy controls the content of this file when an OpEasy template is assigned.

An OpEasy administrator's ability to access certain settings depends on the administrator's login level and assigned privileges.

This document provides instructions about performing the following functions, which are generally available to Group Administrators (GA), Enterprise Administrators (EAs), and those with higher levels of access privileges:

- Users-Add, Modify, Delete, or Search for Users.
- Virtual Users–Add a new virtual user or search for, and edit or delete virtual users, including Auto Attendants and Hunt Groups.
- Import–Use spreadsheets to create users and user features.
- Export-Export Clearspan data to a spreadsheet.
- Phone Management–Add, Modify, Delete, or Search for Phone Devices. A list of devices can be exported to a spreadsheet. Devices must be created before User Profiles are created.
- Phone Templates–Add, Modify, Delete, Copy, or Search for phone templates. Templates must be created before creating User Profiles.
- User Profiles—Add, Modify, Delete, or Search for User Profiles. The User Profile is a set of rules that is applied to a User. The User Profile must be created before the Basic OpEasy Admin can create Users.
- Enterprise Settings–Add or Modify departments, phone numbers, or service packs for an Enterprise.
- Group Settings–Configure authorization codes, call pickup groups, departments, custom device type tags, night forwarding, phone directory management, or phone numbers for groups.

Basic provisioning functions such as adding, modifying, and removing users, generally available to Department Administrators (DAs), are covered in the *Clearspan OpEasy Basic Provisioning Guide*.

Do not Sell My Personal Information: When the **Do Not Sell Link** checkbox is enabled in the System Settings by an administrator. It displays the **Do Not Sell My Personal Information** link on all the OpEasy page headers to support the CCPA compliance.

Skip Nav: In order to facilitate the navigation of an OpEasy page without the use of a mouse, a **Skip Nav** hyperlink has been added on all the OpEasy page headers.

When the **Skip Nav** link is clicked, the cursor focus is navigated past all the navigation links that exist across the top of the page and down the left side of the page.

When an administrator enters a page, he needs only to hit the tab key to bring focus to the **Skip Nav** link then hit return in order to skip past all navigation links. The administrator can use the tab key to navigate the page content beginning at the OK button.

Notes:

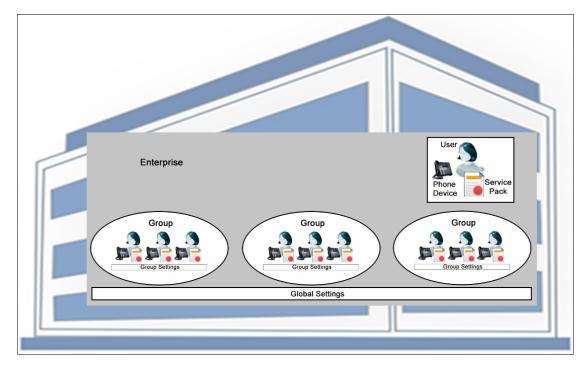
- OpEasy highlights all table rows with view or edit links, with a darker background color when you hover the mouse over the row, and a lighter background color when there are no links in the row.
 - Click anywhere on a row containing edit or view links to navigate to the edit link. To execute view, click on the view link or anywhere within the column containing the view link.
 - Whenever a row contains multiple links in the row, click on any column of the row for edit or view navigation, except columns containing links for other functions (such as, copy or delete) to navigate to the column's link instead of the edit or view link.
- Mitel 6800 series phones also include the phones formerly known as Aastra 6800 phones.

Initial System-Level Setup

E2

Using the customer's requirements for features and functionality, OpEasy comes set up with an Enterprise, one or more Groups within the Enterprise, Global Settings, and Service Packs to be used across the Enterprise. An Enterprise is the highest-level organization in OpEasy, typically representing an institution or business. At least one Group must exist within an Enterprise. Individual Users are assigned to Groups. Global Settings are set at the System, Enterprise, and Group levels for a specified phone device manufacturer. Clearspan creates the phone device types that OpEasy administrators can provision and assign to users on the Clearspan platform. A device type is typically a phone model, such as the Mitel 6869i SIP phone.

Clearspan and OpEasy administrators may work together to define the Service Packs that will be used within an Enterprise. Service Packs include features, some of which are licensed on a per-user cost basis. Administrators should be familiar with the Enterprise Settings, Global Settings, Groups, and Service Packs configured, so that they can set up devices and users appropriately.



Setting Up Users with Phones

After the system-level and global settings have been configured, and you are ready to set up a phone for someone, create a user in OpEasy with an associated phone device. The typical steps for creating a user and a phone for that user in OpEasy are as follows:



1. Choose or create a phone Template Definition. Templates define a reusable set of features for a specific type of phone. They control the behavior of each button and softkey; the ring tones,

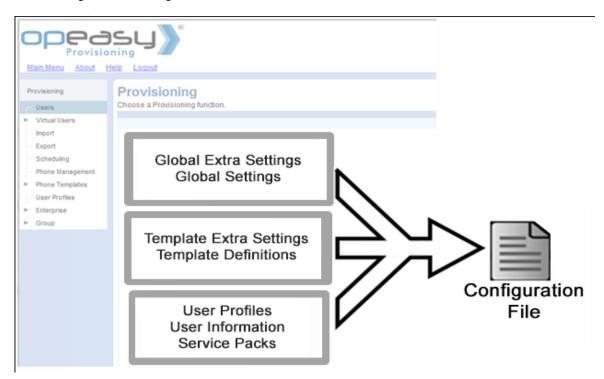
how items are displayed on the screen, and so on. For more information, see the Phone Templates section.

- 2. Choose or create a User Profile. User Profiles are reusable sets of rules to be applied when new users are created. User Profiles contain information such as which phone template to use, which Service Packs to assign, what phone number to assign, the Voice Mail settings to use, and so on. For more information, see the User Profiles section.
- 3. Create a User in OpEasy for each person who will be using a phone. User information includes first name and last name, email, passwords, phone numbers, phone assignments, location, optional services configuration, and so on. Choosing a User Profile while creating a User simplifies the configuration requirements by automatically filling in many of the details. For more information, see the Users section.

OpEasy allows you to create a primary Phone Device for a User as part of creating the User. Creating a Phone Device includes identifying information such as the brand and model of phone, associated Phone Template, number of lines/ports, MAC address, assigned phone number or extension, and so on.

You can create one user at a time in the Users section of OpEasy, or you can create multiple users at once using the OpEasy Import feature. For more information, see the Import section.

- 4. After a User and an associated Phone Device are created, OpEasy sends setup instructions to the user's Email. New User E-mail Notifications are configured in General Settings under Users.
- OpEasy also generates a phone configuration file based on device, profile, template, and user information. For more information about how these settings are combined, see the Viewing or Editing Global Settings section.



6. Install the phone at the user's location. When a phone is connected to the network and started up, it prompts you for a Device ID or for device credentials depending on the device type, to

apply the appropriate configuration file. For more information, refer to the Set Up a New Phone for a New User section.

7. The phone is ready to use.

Third Party Phone Provisioning

OpEasy supports creating templates and devices for certain third-party phone manufacturers (Cisco, Panasonic, and Polycom).

This functionality requires a system license quantity to be purchased and installed.



Note: For Hosted systems, the system licenses will be allocated (or set for Auto usage) for each enterprise.

Third Party Phone Support

The Clearspan team provides support for certain third-party phone manufacturers (Cisco, Panasonic, and Polycom).

For Premise systems, support charges are included in your annual maintenance fees.

For Hosted systems, a small charge (per device) will be added to the monthly invoices for deployed quantities of the above devices.

Phone Templates

The Phone Templates function allows you to manage device configuration files for phones, by creating and assigning phone templates to a phone. The Clearspan system uses the assigned template when building or rebuilding the configuration files for the associated phone. The Provisioning application of OpEasy allows editing, deleting, or copying of templates. You can also create a template for Clearspan Communicator clients and certain AudioCodes devices. The following illustration shows a graphical representation of a phone template.

Build the Templates before configuring the Phone Management, User Profiles, and Users. Building a phone template consists of configuring the following:

- Definitions (Templates)–Creates the phone template definitions.
- Key Definitions–Displays and configures system-wide or Enterprise-wide definitions for keys.
- Global Settings–Displays and changes the global Clearspan settings for a specified Phone Manufacturer.
- EMS Addresses–Displays the list of EMS Server addresses (host names/IP addresses). The EMS server is used by the phone soft keys.

Notes:

- All the Aastra phones are now known as Mitel phones.
- For a new Opeasy setting added to Templates and Global Settings, the '(Unspecified)' selection option or text value is displayed. The '(Unspecified)' value indicates that no value has ever been set, because of which OpEasy has NOT generated configuration file fields for that new setting. As such, any existing Global Extra Settings for that configuration file field continue to be used.

However, once a setting has been changed to an actual value (replacing the '(Unspecified)' value), then OpEasy generates configuration file fields for that setting from then on. These actual values then override any Global Extra Settings for that field. Once a value is selected to replace the '(Unspecified)' value, the '(Unspecified)' value is no longer an option.

Polycom Phone Support

2

You can use OpEasy to configure certain Polycom phones when the Polycom Phone Support 3rd party system license for Clearspan is installed. Refer to the appendix of this guide for more information about using OpEasy to provision Polycom phones.

Viewing Phone Template Definitions

Phone Templates are displayed and configured from the Template Definitions page. There can be many templates for the same device or phone type, depending upon the needs of an organization.

To view a phone template definition:

1. From the main menu, select **Provisioning**, and then select **Phone Templates**.

 Click **Definitions** in the menu tree or click **Definitions** in the Phone Templates menu. The Template Definitions page opens.

Template Defin Display and configure phone	
OK	
Template Level:	Enterprise and Group
Enterprise:	(Select Enterprise)
Group:	(Select Group) -
Device Type:	(Select Device Type) *
Phone Model:	

Figure 1: Template Definitions Page

- 3. Choose the Template Level from the drop-down list.
- 4. Select the Enterprise and Group from the respective drop-down lists, if needed.
- 5. Select the **Device Type** (phone type) from the drop-down list. All existing templates, including the default for this phone type under this Template Level, display in the list. As soon as you select the device type, the remaining part of the page opens.

Viewing, Adding, or Editing Key Definitions

There may be times when a new key must be added to a template to access new applications, speed dials, and so on. The Key Definitions page allows you to add additional feature keys to the default list that will be used when building phone templates. All the defined feature keys display in the Key Definitions page.

Each key added requires a label that will appear on the phone key and a value, which can be a URL, an XML application, a feature access code, a number, blank, and so on. The value is the action taken when the key is pressed.



Note: The default feature codes for Clearspan are described in the Feature Access Codes Quick Reference Guide, which is available on the Clearspan Technical Publications website.

- 1. From the main menu in OpEasy, select **Provisioning**, and then select **Phone Templates**.
- 2. From the **Phone Templates** page, click **Key Definitions** from the menu tree, or click **Key Definitions** in the Phone Templates menu.
- 3. Select an Enterprise to view key definitions for a specific Enterprise. or select (System Keys) to view key definitions for all Enterprises in the system.
- 4. Select one of the following options from the Template Keys drop-down list:
 - Both System and Enterprise Keys
 - System Keys Only
 - Enterprise Keys Only

The Template Keys selection determines the keys Administrators will be able to use while creating templates. The Admins can configure to use only System defined keys, only Enterprise Keys or the System and Enterprise Defined Keys.

5. Select the **Phone Manufacturer**, if necessary. The available manufacturers depend on the device types configured for the Enterprise. The Key Definitions page opens, as shown in the following figure.

		Key Definiti	ons			
		(1-25 of 29) 🛛 🔫	12 🔊	►I.		
Туре	Label 💠	Value 💠	Idle	Connect	Incoming	Outgoin
Auto Call Distribution 🔹	ACD - Ent		~			
XML 👻	ACD_Avail	http://%CS_SOFT_KEY_URI%/acd.php?funct	~			
XML 👻	ACD_SignIn	http://%CS_SOFT_KEY_URI%/acd.php?funct				
XML 👻	ACD_SignOut	http://%CS_SOFT_KEY_URI%/acd.php?funct				
XML 👻	ACD_Unavail	http://%CS_SOFT_KEY_URI%/acd.php?funct				
BLF/List -	BLF List					
Call Forward 👻	Call Fwd					
Speeddial -	Call Pull	*11	~		~	
Speeddial -	Call Rtn	%BWFAC-CALL-RETURN-1%	~		~	
Callers -	Callers		~			
XML 👻	CallLog	http://%CS_SOFT_KEY_URI%/calllog.php?sp	~		~	V
XML -	Call_Mark	http://%CS_SOFT_KEY_URI%/callmark.php?	~		~	~
Conference -	Conf		~		~	
Speeddial -	Dir CallPick	%BWFAC-DIRECTED-CALL-PICKUP-1%	~		~	~
Directory -	Directory		~		~	~
Do Not Disturb 👻	DND		~	~	~	~
Empty -	Empty					
Empty -	Ent MT		~	~	~	~
XML -	LDAP	http://%CS_SOFT_KEY_URI%/ad.php	~	~	~	~
Line 👻	Line		~	~	~	~
Phone Lock -	Lock		~	~	~	~
Speeddial -	Park	(*68			Image: A start of the start	
Speeddial 👻	Park Rtrv	%BWFAC-CALL-PARK-RETRIEVE-1%	~		~	~
XML -	SD 100	http://%CS_SOFT_KEY_URI%/cs.php?is100=	~			
XML -	SD 8	http://%CS_SOFT_KEY_URI%/cs.php?is100=	~			
		(1-25 of 29) 14 <	12 >>>	►I		
		- End of Defini	tions -			

Figure 2: Key Definitions Page Part 2 – Keys Portion

Z

Note: You can modify an existing Key Definition or add a new one.

6. To add a new Key Definition, click **Add**. A new row is added at the top of the list, and its type is "None" as in the following example.

		Key Definiti	ons				
		(1-25 of 30) 🛛 🖂 🤜	12 🔊	▶1			
Туре	Label 💠	Value 💠	Idle	Connect	Incoming	Outgoing	B
None -							
Auto Call Distribution 👻	ACD - Ent		~				
XML -	ACD_Avail	[http://%CS_SOFT_KEY_URI%/acd.php?funct]					
XML -	ACD_SignIn	http://%CS_SOFT_KEY_URI%/acd.php?funct	~				

Figure 3: Key Definition Row Added

7. Select the key type from the drop-down list as shown in the following example.

Auto Call Distribution 👻	ACD - Ent		~				
None	ACD_Avail	http://%CS_SOFT_KEY_URI%/acd.php?funct	 Image: A start of the start of				
Auto Call Distribution	ACD_SignIn	http://%CS_SOFT_KEY_URI%/acd.php?funct	~				
BLF/List	ACD_SignOut	http://%CS_SOFT_KEY_URI%/acd.php?funct	V				
BLF/Xfer	ACD_Unavail	http://%CS_SOFT_KEY_URI%/acd.php?funct	~				
Call Forward Callers	BLF List		~				
Conference	Call Fwd						
Directed Call Pickup	Call Pull	*11	~	~	~	~	
Directory Do Not Disturb	Call Rtn	%BWFAC-CALL-RETURN-1%	~	~	~	~	
Empty	Callers		~				
Flash	CallLog	http://%CS_SOFT_KEY_URI%/calllog.php?sp				~	
- Line - Mobile	Call_Mark	http://%CS_SOFT_KEY_URI%/callmark.php?					
Park	Conf					~	
Phone Lock	Dir CallPick	%BWFAC-DIRECTED-CALL-PICKUP-1%	~	~		~	
- Pickup - Services	Directory						
Speeddial	DND		~	~	~	~	
Speeddial/Conf	Empty						

Figure 4: Key Definitions – Key Type Drop-Down List

- 8. Enter a Label for the key. Key labels are a maximum of 12 characters.
- **9.** Enter a **Value**, if applicable. The value is blank by default. However, it can be a link to an application that this key will access, or a link to an internet news service, and so on. This information should be provided by the system administrator.
- **10.** Select the phone states defining when this key will display on the phone. All states are unchecked by default.

Auto Call Distribution 👻	ACD - Ent	Key Definitions – Key Type Drop-Down List					
XML	ACD_Avail	http://%CS_SOFT_KEY_URI%/acd.php?funct					
XML -	ACD_SignIn	http://%CS_SOFT_KEY_URI%/acd.php?funct	~				
XML -	ACD_SignOut	http://%CS_SOFT_KEY_URI%/acd.php?funct	~				
XML 👻	ACD_Unavail	[http://%CS_SOFT_KEY_URI%/acd.php?funct]					
BLF/List -	BLF List		~				
Call Forward -	Call Fwd						
Speeddial 👻	Call Pull	*11					v
Speeddial 👻	Call Rtn	%BWFAC-CALL-RETURN-1%	~	~	V		~
Callers -	Callers		~				
XML 👻	CallLog	http://%CS_SOFT_KEY_URI%/calllog.php?sp	~				~
XML -	Call_Mark	http://%CS_SOFT_KEY_URI%/callmark.php?	~	~			~
Conference -	Conf		~	~	~	V	~

Figure 5: Key Definitions – Added Auto Call Distribution

- 11. Click OK or Apply.
- **12.** If you make changes that affect any templates, the Rebuild Configuration Files page appears. Click **Save and Rebuild** to save the changes and start the configuration file rebuild process, or click **Cancel**.

Review the number of Enter	s: Rebuild Configuration Files prises, Groups, and Templates affected by modifying this Enterprise Key. All devices in the Enterprise that use this Key will be rebuilt. Click "Save and Rebuild" to save th files using this template. Click "Cancel" to return without saving or rebuilding.
Cancel	Save and Rebuild
The following areas may	require Phone Device configuration files to be rebuilt as a result of this change:
the following areas may	require r none berne configuration mes to be repair as a result of and onlinge.
Template Name:	16 Templates affected
Template Level:	Enterprise and Group Level Templates affected.
Device Type:	4 Device Types affected
Phone Manufacturer:	Mitel (Aastra)
Enterprise:	5 Enterprises affected
Group:	38 Groups affected

Figure 6: Key Definitions: Rebuild Configuration Files Page

13. Click OK. Rebuild Status is shown on the Template pages and Global Settings page.

Deleting a Key Definition



CAUTION: Deleting a Key Definition affects all phones using that definition.

You can delete a key definition from the Key Definitions page as in the following examples.

- 1. From the main menu, select **Provisioning**, and then select **Phone Templates**.
- 2. From the Phone Templates page, click **Key Definitions** from the menu tree, or click **Key Definitions** in the Phone Templates menu. The Key Definitions page opens.
- 3. Select an Enterprise to remove a key definition at the Enterprise level only, or select (System Keys) to remove a key definition for the system.
- **Key Definitions** (1-25 of 29) 1 2 🕨 🖬 Label 💠 Incoming Value
 the function of the second sec Busy Type Auto Call Distribution 💌 Idle Connect Outgoing Delete ACD ~ XML http://%CS_SOFT_KEY_URI%/acd.php?funct ACD Avail XML 👻 ACD SignIn http://%CS_SOFT_KEY_URI%/acd.php?funct ~ Delete XML 👻 ACD_SignOut http://%CS_SOFT_KEY_URI%/acd.php?funct ~ Delete XML 👻 http://%CS_SOFT_KEY_URI%/acd.php?funct ACD_Unavail ~ Delete BLE/List BLE List ~ Delete Call Forward 👻 Call Fwd Delete
- 4. Click **Delete** on the far-right side of the row of the key to delete the key definition.

Figure 7: Key Definitions – Delete

- 5. Click **OK** in the confirmation dialog box. The key definition is deleted and no longer appears in the list.
- 6. Click OK. The Phone Templates page opens.

Creating a New Phone Template

- 1. From the main menu, select **Provisioning**, and then select **Phone Templates**.
- 2. Click **Definitions** in the menu tree or click **Definitions** in the Phone Templates menu. The Template Definitions page opens.
- 3. Select a Template Level from the drop-down list if necessary.
- 4. Select the Enterprise and Group, if necessary.
- 5. Select a **Device Type** from the drop-down list.
- 6. Select a New Template Level from the drop-down list.
- 7. Enter the name of the template in the **New Template Name** text box.

Template Definiti Display and configure phone tem		
ОК		
Enterprise: Bu Group: Gr Device Type: Aa Phone Model: Mite	nterprise and Group Ilk Provisioning Lab Val, Inc roup_G Group, Gewel astra 6869i Il (Aastra) 6869i fresh Group: None pendin	
	st1	Add Template
		Templates
Name 💠	Level 💠	Description 💠
<default></default>	Group	
Legacy_69i_Grp	Group	69i Legacy Device
		- End of Templates -

Figure 8: Enter New Template Name

- 8. Click Add Template. The Template Add page opens. The General tab opens by default.
- **9.** Configure the general settings, lines, and keys for the new template as described in the following sections, and then click **OK**.

Configuring General Settings

On the Template Add page:

- 1. Enter a **Description** of the template.
- 2. If an expansion module is used, select the **Type of Expansion Module**. Choices depend on the phone device type. Also select the number of **Expansion Modules**. The maximum allowed is no more than three, but it depends on the type of phone and expansion module. When expansion modules are specified, new tabs appear to allow assignment of the additional keys.

Template Add
Create a new phone template.
OK Cancel Apply
Template Name: Test2
Template Level: Enterprise
Enterprise: Bulk Provisioning Lab Val, Inc
Device Type: Aastra 8889i
Rebuild Status: Refresh. Enterprise: None pending.
Restart Phones: 🔲 NOTE: If Restart Phones is unchecked, the template will not take effect until a resync or when the phone is rebooted.
General Lines Soft Keys Top Soft Keys Hard Keys Features Extra Settings
General Lines Jointreys hop Jointreys Transineys Features LAUS Jetunitys
Name: Test2
Description:
Uescipion
General Settings
Type of Expansion Module: None + URI for Soft Keys: (Select EMS Address) +
Expansion Modules: 0 - Time Zone: (Use Global Settings) +
Use VLAN: WARNING: Enabling VLAN may cause some phones to stop operating.
Outbound Proxy: 👿 Use Global Settings
Use DNS SRV Lookup
Port (No Encryption):
Port (Encryption):
Encryption (TLS/SRTP): (Use Global Settings) 💌 WARNING: Configure encryption in the network before setting Encryption to Required.
Encryption Certificate File:
Subscription Time: 📝 Use Global Settings
(as-feature-event) seconds
Display Settings
Background Image URL:
Idle Soreen Mode: Primary Soreen Mode) •
Idle Screen Font Color: Bue +
Screen Saver Image:
Soreen Saver Wait Time: 0

Figure 9: Template Add Page

- 3. Select the URI for Soft Keys from the drop-down list. You cannot save the configuration unless you choose the URI. This entry is used to point to the appropriate EMS server for certain key definitions.
- 4. Select the Time Zone from the drop-down list. Use Global Settings uses the time zone configured in Global Settings under Phone Templates. User Time Zone uses the time zone of the first primary user assigned to the phone. Use DHCP uses the time zone from the DHCP server. You can also select a specific time zone.
- 5. Select **Use VLAN** to add support for configuring phones to use their VLAN capability.



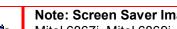
Note: Enabling VLAN may cause some phones to stop operating.

6. Use Global Settings for Outbound Proxy, Outbound Proxy Port (No Encryption) and Outbound Proxy Port (Encryption), or uncheck Use Global Settings checkbox to enter the Outbound Proxy Address, Outbound Proxy Port (No Encryption) and Outbound Proxy Port (Encryption) used by this phone. These optional fields can contain text up to 256 characters, as well as tags.

- 7. Select the Use DNS SRV Lookup option to use the Outbound Proxy Port (No Encryption) and Outbound Proxy Port (Encryption) of the DNS SRV.
- 8. Select the setting for Encryption (TLS/SRTP). For the Encryption Certificate File, enter the certificate filename for the device type. Enabling encryption affects both encryption of signaling using Transport Layer Security (TLS) and encryption of the media (voice) using Secure Real-time Transport Protocol (SRTP). These settings are available for Mitel 6800 and 6900 phone models, AudioCodes MP-11X (DMS) and Media5 devices.

When Encryption (TLS/SRTP) is required, the transport protocol is set to TLS. Otherwise, the transport specified by the device (UDP or TCP) is used as the transport protocol.

- 9. Use Global Settings for subscription time (as-feature-event) or uncheck the Use Global Settings check box and enter the subscription time in seconds.
- **10.** Enter the location of the Image to be used as the background image on the idle screen of the phone in the **Background Image** field. The Background Image is a text file. The requirements for the file are as follows:
 - 320x240 pixels (Mitel 6867i, 6920)
 - 480x272 pixels (Mitel 6869i, 6930) •
 - 800x480 pixels (Mitel 6873i, 6940)
 - 24 or 32-bit color depth
 - 1MB maximum file size •
 - JPG and PNG are supported
 - There should be no frame around the image •



Note: Screen Saver Image and Screen Saver Wait Time setting are supported for Mitel 6867i, Mitel 6869i, Mitel 6873i and Mitel 6900 series phones. This note applies to the following four steps.

- 11. Set the Idle Screen Mode to control the screen display mode when the phone is idle. Primary Screen Mode displays the user's name and line number in the top status bar, along with a larger date and time. Secondary Screen Mode displays the user's name and phone number or extension. Along with a smaller repositioned date and time.
- **12.** Set the **Idle Screen Font Color** to control the font color used on the idle screen of the phone. The options are Blue (Default setting for System level), White, or Black.
- 13. Enter the location of the Image to be used as the Screen Saver image on the idle screen of the phone, in the Screen Saver image field.
- 14. Enter the number of seconds to activate the screen saver in Screen Saver Wait Time field.

Assigning Lines

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The Lines tab provides Clearspan Line Position to Phone Key mapping. Lines can be assigned to soft keys, programmable keys, and specific hard keys (for some Mitel phone models such as the 6867i). You can also select the Line Label and Ring Type for a line.

1. On the Template Add page, select the **Lines** tab. The number of lines displayed depends on the number of lines that the phone supports.

- 2. Change the **BLF Line/User** if necessary. This value applies when the Busy Lamp Field (BLF) feature is assigned. The default of 1 is generally the preferred setting. The value is used to identify which line will be associated with the BLF list URI.
- 3. Select the Clearspan Line Position that you want to assign.

Template Add Create a new phone template.			
OK Cancel Apply			
Template Name: Test2			
Template Level: Enterprise			
Enterprise: Bulk Provisioning Lab \	al, Inc		
Device Type: Aastra 6869i			
Rebuild Status: Refresh Enterprise: 1	lone pending.		
Restart Phones: 📄 NOTE: If Restart f	hones is unchecked, the template	will not take effect until a resync or when the phone is	ebooted.
General Lines Soft Keys Top Soft H	eys Hard Keys Featur	es Extra Settings	
BLF Line / User: 1 Use	ul tags for Line Label text: {Ext}, {	Number}, {FirstName}, {LastName}	
	Pho	e Line to Clearspan Line Position Mapping	
Phone Line Clearspan Line Position	Phone Key	ine Label	Ring
1 (Unassigned) 👻	Line 1		
2 (Unassigned) +	Line 2		
2 [/[leaseisped]] -	(Leassianed)		

Figure 10: Phone Line to Clearspan Line Position Mapping

For the Mitel DECT 112 phones

- 1. Choose the Line Label from the Line Label drop-down box. All the handsets lines use the same line label. The Line label drop-down box contains the following options:
 - Extension
 - Phone Number
 - Text
- 2. Select the Clearspan Line Position. Handsets range from 1 to 16.

emplate Modify	
nange an existing phone template.	
OK Cancel .	Apply
Template Name: Test 112	
Template Level: Enterprise	2
Enterprise: Bulk Prov	isioning Lab Val, Inc
Device Type: Mitel DEC	T 112 (DMS)
Rebuild Status: Refresh	Enterprise: None pending.
Restart Phones: 📄 NC	TE: If Restart Phones is unchecked, the template will not take effect until a resync or when the phone is rebooted.
General Lines Extra Set	tings Template Users
USETUI TA	gs for Line Label text: {Ext}, {Number}, {FirstName}, {LastName} Handset to Clearspan Line Position Mapping
Handset	Clearspan Line Position
1	Position 1 +
2	Position 2 -
3	(Unassigned) V
4	((Unassigned)
5	(Unassigned) (Unassigned) (Unassigned) (Unassigned)
7	(Unassigned)
8	(Unassigned)
9	(Unassigned) *
10	(Unassigned) -
11	(Unassigned) +
12	(Unassigned)
13	(Unassigned)
14	(Unassigned) +
15	(Unassigned) +
16	(Unassigned) +

Figure 11: Handsets to Clearspan Line Position Mapping – Mitel DECT 112

- 3. Choose the Line Label, which determines the label shown on the phone display. Choosing Text allows you to enter up to 16 characters of text along with the Extension, represented by the tag {Ext}, or phone number, represented by the tag {Number}. To display a name, set the Text label to "{First Name} {Last Name}" or "{Last Name}, {First Name}".
- **4.** Choose the **Ring** type. The default can be changed on the phone, but initially it is the common ring: "2-4", or two seconds of ringing followed by four seconds of silence.
- 5. Repeat these steps for every line on the phone that you want to assign.

Note: For information about configuring the ringtone for a line on Polycom or Panasonic phones, refer to the appendixes of this guide.

Configuring Soft Keys

EA

The **Soft Keys**, **Top Soft Keys**, and **Programmable Keys** tabs allow you to assign specific functions to programmable keys on the phone. Top Soft Keys are those located higher on the phone console.

1. On the Template Add page, select the **Soft Keys**, **Top Soft Keys**, or **Programmable Keys** tab. A list of available keys is displayed. The tabs available, the number of lines, and the number of programmable keys depend on the phone.

Template Add Create a new phone template.					
OK Cancel Apply					
Template Name: Test2 Template Level: Enterprise Enterprise: Bulk Provisioning Lab Val, Inc Device Type: Aastra 68691 Rebuild Status: Refresh Enterprise: None pending.					
Restart Phones: NOTE: If Restart Phones General Lines Soft Keys Top Soft Keys	Hard Keys Features	not take effect until a resync or when the phone is	rebooted.		
General Lines Soft Keys Top Soft Keys	Haru Neys Features	Extra Settings			
		Top Soft Keys			
Key	Label		Phone Line		
1	Call Fwd -		Line 7 V		

Figure 12: Template Add – Soft Keys Tab

- 2. Select a feature or line from the Label drop-down list for Key 1. This drop-down list of features is derived from the list of Key Definitions.
- 3. Choose a Phone Line for the key if presented.
- **4.** Continue configuring the keys until you have assigned all the features desired to the programmable keys in the template.



Note: In addition to the standard Polycom soft keys, some OpEasy-configured soft keys can be assigned to Polycom or Panasonic phones. For more information, refer to the appendixes of this guide.

Configuring Hard Keys

On the Template Add page, select the **Hard Keys** tab. The Hard Keys list appears. The number of lines and keys depends on the phone. For Mitel phones that support reprogrammable hard keys, the **Hard Keys** tab displays the functions for keys that can be reassigned.

Template Add Create a new phone template.							
OK Cancel Apply							
Template Name: Test2							
Template Level: Enterprise							
Enterprise: Bulk Provisioning Lab Val, Inc	Enterprise: Bulk Provisioning Lab Val, Inc						
Device Type: Aastra 6869i							
Rebuild Status: Refresh Enterprise: None pending.							
Restart Phones: NOTE: If Restart Phones is unche General Lines Soft Keys Top Soft Keys Hard H	cked, the template will not take effect until a resync or when the phone teys Features Extra Settings	is rebooted.					
	Hard Keys						
Key	Key Label Phone Line						
Line 1 (hardkey1)	Manufacturer Default>						
Line 2 (hardkey2)	Manufacturer Default>						
Redial (hardkey3)	<manufacturer default=""> 💌</manufacturer>						
Callers (hardkey4)	Manufacturer Default>						

Figure 13: Template Add – Hard Keys Tab

1. Select a feature from the Label drop-down list for each key.



Note: For some Mitel phone models, selected hard keys (such as Callers List and Redial for the Mitel 6867i) can also be assigned as a Line, BLF, BLF/List, BLF/Xfer, or Auto Call Distribution. Only the selected hard keys can be used as Line keys.

- 2. Choose a Phone Line for the key.
- **3.** Continue configuring the keys until you have assigned all the features you want to the hard keys in the template.

Configuring Features

On the Template Add page, select the **Features** tab. The Features list appears.

Template Add Create a new phone template.
OK Cancel Apply
Template Name: Test2 Template Level: Enterprise Enterprise: Bulk Provisioning – Lab Val, Inc Device Type: Astra 6899! Rebuild Status: Refresh Enterprise: None pending.
Restart Phones: 🧧 NOTE: If Restart Phones is unchecked, the template will not take effect until a resync or when the phone is rebooted.
General Lines Soft Keys Top Soft Keys Hard Keys Features Extra Settings
Features Disable Missed Calls Msg. Conference Server: (Use Global Settings) Clearspan Directory Type: Enterprise Common Group Group Common Foroup Personal
Static Call Park/Pickup: (Use Global Setting) 🗸

Figure 14: Template Add – Features Tab

- 1. Select **Disable Missed Calls Message** to disable the Missed Calls message from displaying on Mitel phones.
- 2. Select the Conference Server from the Conference Server drop-down box.
- 3. Select the Clearspan Directory Type. You can select multiple directory types from the following list:
 - Enterprise
 - Enterprise Common
 - Group
 - Group Common
 - Personal



Note: The **Clearspan Directory Type** option is supported only for 6800 and 6900 series phones.

4. Enable Static Call Park/Pickup if you want Park and Pickup keys to appear on the phone automatically, without the need to specifically define a Park or Pickup key. If you enable this

setting when those keys are also defined, then two Park/Pickup keys appear on the phone. This setting appears only for phone models that support display of these keys.

- 5. Select the **Enable Mobile Link Dir** checkbox to enable the mobile contacts to be synced to the phone and displayed as a directory on the desk phone.
- 6. Enter the desired name for the mobile directory on the desk phone in the **Name for Directory** field.



Notes: The **Enable Mobile Link Dir** and **Name for Directory** fields are available for Mitel 6930 and Mitel 6940 phones.

7. Click OK or Apply.

Z

Notes: For information about Features Settings for templates specific to Polycom or Panasonic phones, refer to the appendixes of this guide.

Configuring MiVoice Conference Phone Applications

Templates for the Mitel MiVoice Conference Phone (UC360 Collaboration Point) include an Applications tab. Select the box beside an application to enable it on the phone: MiCollab Conference, Browser, Smart Office 2, Cisco WebEx Meetings, Join.me, Remote RDP, and Remote VNC.

Configuring Extra Settings

Template Add Extra Settings:

1. On the Template Add page, select the **Extra Settings** tab to view or change configuration information. The Extra Settings tab allows entry of additional configuration file information that is specific to this template, as shown in the following example.

	plate Ad										
0	к Са	ncel Ap	apity								
	Enterpris Device Typ	et: Enterprise	4	ending.							
	Restart Phone	IS: 📄 NOT	E: If Restart Phones	is unchecked, the	e template wil	I not take effect until	a resync or wh	ten the phone is	s rebooted.		
Gene	ral Lines	Soft Keys	Top Soft Keys	Hard Keys	Features	Extra Settings					
	play a ring spla announcement # Special so # This will all # there is a m # But the line is announcement #mwi led line: 9 #line9 ring tone	appickup preto: th: 1 meanenenenenenenenenenenenenenenenenenen	ones o turn on when	******							

Figure 15: Template Extra Settings Tab

2. Click Browse to choose a configuration settings file that was previously created, if necessary, and use the Upload File button to access the file. You can create a text file that contains extra settings that apply to many templates. The text file can be uploaded using this field to reduce the risk of typos and provide consistency of content.



Note: For information about configuring items for Polycom or Panasonic phone templates on phone template tabs, refer to the appendixes of this guide.

OpEasy analyzes the Template Extra Settings to determine whether there are any parameters in the Extra Settings that are being overridden by the Template settings. If parameters that correspond to any of the Template settings are found in the Extra Settings, then the **Template Definitions: Extra Settings Audit Results** page is displayed, indicating the extra settings parameters that conflict with the Template settings configuration.

	Femplate Definitions: Extra Settings Audit Results Isplay of the results of an audit of the Extra Settings to determine if any content configured in Extra Settings is in conflict with settings configured in the Template Settings:								
ОК									
Enterprise:	TestTest								
Template Name:	Aastra6869_TEMPLATE_RSuccess1								
Template Level:	Enterprise								
Device Type:	Aastra 6869l (DMS)								
The following Temp	plate Extra Settings content is OVERRIDING the Template configuration settings. The specified content should be removed from the Template Extra Settings:								
idle screen mode: 1 idle screen font colo	yr: White								

Figure 16: Template Definitions: Extra Settings Audit Results Page

Editing a Template

- 1. From the main menu, select **Provisioning**, and then select **Phone Templates**.
- 2. Click **Definitions** in the menu tree, or click **Definitions** in the Phone Templates menu. The Template Definitions page opens.
- 3. Choose the Template Level from the drop-down list.
- 4. Choose the Enterprise from the drop-down list.
- 5. Choose the Group from the drop-down list.
- 6. Choose the **Device Type** from the drop-down list. A list of templates that were created for this device type is displayed.
- 7. For the template you want to edit, click on the **Edit** link at the end of the row or click anywhere on the template you want to modify. The Template Modify page opens.
- **8.** Follow the procedures in the Creating a New Phone Template section to make any changes by using the Template Modify tabs.
- 9. Click OK or Apply.
- **10.** On the Rebuild Configuration Files page that appears, click **Save and Rebuild** to save the changes and start the configuration file rebuild process, or click **Cancel** to discard the changes.



Notes: This only applies to Group and Enterprise and does not display for System Settings.

Review the number of Group	fy: Rebuild Configuration Files is affected by modifying this enterprise-level template. All devices in the Enterprise that use this template are affected. Click "Save and Rebuild" to save the Tei template. Click "Cancel" to return without saving or rebuilding.
Cancel	Save and Rebuild
The following areas may	require Phone Device configuration files to be rebuilt as a result of this change:
Template Name:	Test1
Template Name: Template Level:	Test1 Enterprise
Template Level:	
Template Level: Device Type:	Enterprise Aastra 6757i (DMS)
Template Level: Device Type: Enterprise:	Enterprise Aastra 6757i (DMS)

Figure 17: Template Modify: Rebuild Configuration Files Page

Rebuild Status is shown on the Template pages and the Global Settings page.

Searching for Template Users

- 1. From the main menu, select **Provisioning**, and then select **Phone Templates**.
- 2. Click **Definitions** in the menu tree, or click **Definitions** in the Phone Templates menu. The Template Definitions page opens.
- **3.** Click on the **Edit** link at the end of the row or click anywhere on the template you want to modify. The Template Modify page opens.
- 4. Select the Template Users tab.
- 5. Select **Usage Displayed By** for a list of users or devices that use the template.
- 6. You can use search criteria to filter the list, or you can click **Search** or enter Search parameters to view the full list.

Template Mod Change an existing phone							
OK Canc	el Apply						
Template Name:	Aastra6867						
Template Level:	Template Level: Enterprise						
Enterprise:	Moorehouse Moo	ore Enterprises of Texas					
Device Type:	Aastra 6867i						
Rebuild Status:	Refresh Enterp	orise: None pending.					
Restart Phones:	NOTE: If Re	estart Phones is unchecked, th	e template will not take effect	until a resync or when the	phone is rebooted.		
General Lines	Soft Keys Top	Soft Keys Hard Keys	Features Extra Settin	s Template Users			
	Usage Displayed By: User Device Enter Search Criteria: Search						
(All Template Assignm	nents) 🚽 Contain	S: 👻			- +		
Comun ID .	C	un Mana a		e Devices			-
Group ID No devices reference t		up Name 💲	Device 💲	Device L	enel Ĉ	MAC Address 💠	
			- End of	Devices -			
			Template U	Iser Profiles			
Group ID 💠		Group Name 💠		User Profile Name 💠		User Profile Description 💠	

Figure 18: Searching for Template Users

Notes:

• If you select **All Template Assignments**, both the **Template Users** table and the **Template User Profiles** table are displayed.



- If you select All User Profiles, only the Template User Profiles table is displayed.
- If you select any other option, only the Template Users table is displayed.

For Clearspan Communicators:

• The MAC Address column is not displayed in the Template Users table.

Renaming a Phone Template

- 1. From the main menu, select **Provisioning**, and then select **Phone Templates**.
- **2.** Click **Definitions** in the menu tree or click **Definitions** in the Phone Templates menu. The Template Definitions page opens.
- **3.** Click on the **Edit** link at the end of the row or click anywhere on the template you want to modify. The Template Modify page opens.
- 4. Change the **Name** on the Template Modify page.

Template Modify Change an existing phone template.
OK Cancel Apply
Template Name: Aastra8887 Template Level: Enterprise Enterprise: Moorehouse Moore Enterprises of Texas Device Type: Aastra 8887i Rebuild Status: Refresh Enterprise: None pending.
Restart Phones: 📄 NOTE: If Restart Phones is unchecked, the template will not take effect until a resync or when the phone is rebooted.
General Lines Soft Keys Top Soft Keys Hard Keys Features Extra Settings Template Users
Name: Moorehouse Temp Description:
General Settings
Type of Expansion Module: None URI for Soft Keys: (Select EMS Address)
Expansion Modules: 0 Time Zone: (Use Global Settings)
Use VLAN: 📄 WARNING: Enabling VLAN may cause some phones to stop operating.
Outbound Proxy: 📝 Use Global Settings
Use DNS SRV Lookup
Port (No Encryption):
Port (Encryption):
Encryption (TLS/SRTP): (Use Global Settings) WARNING: Configure encryption in the network before setting Encryption to Required.
Encryption Certificate File:
Subscription Time: 👿 Use Global Settings
(as-feature-event) seconds
Display Settings
Background Image URL:
Idle Screen Mode: Primary Screen Mode *
Idle Screen Font Color: Blue
Screen Saver Image:

Figure 19: Renaming a Template

5. Click **OK**. The template appears in the list with "(Rename Pending)" next to the template name to indicate that OpEasy is searching for user profiles or devices that use the template. While the rename operation is pending, the template cannot be assigned, edited, or copied.

Template Definit Display and configure phone tem				
ОК				
Enterprise: B Group: G Device Type: M Phone Model: Min Rebuild Status: R	nterprise and Group ulk Provisioning Lab Val, Inc roup_G Group, Gewel itel 6873i (DMS) lel (Aastra) 6873i efresh Group: None pendir select Level)	e. Enterprise: None pending. Add Template		
		Templates		
Name 👌	Level 💠	Description 👌	Edit	Сору
<default></default>	Group		Edit	Copy
6873i_dms-(Rename Pendin	g) Group	73i Test_Screen_Saver		
6873i_dms BLF	Group	73i BLF Test - This One	Edit	Copy

Figure 20: Template Rename Pending

The search for template usage may take several minutes. Refresh the page to view the status updates. If OpEasy confirms that the template is not in use, it is renamed. However, if any references are found, "(Rename Failed: Template In Use)" appears next to the template name, with a link to the Template Usage page.

Template Definitions Display and configure phone template definitions.		
OK		
Template Level: Enterprise and Group • Enterprise: TestTest Shivu's Enterprise • Group: A_Group Group A • Device Type: Aastra 6869I (DMS) • Phone Model: Mitel (Aastra) 6869I Rebuild Status: Refresh Group: None pending. Enterprise: None pending.		
New Template Level: (Select Level) New Template Name: Add Template Templates		
Name 🗠 Level 🖒 Description 🖒	Edit	Сору
<default> Group</default>	Edit	Copy
Aastra6869_TEMPLATE_IN_USE- Rename Failed; Template In-Use) Enterprise	Edit	Copy

Figure 21: Template Rename Failed: Template In Use

mplate Modif					
inge an existing phone ter					
OK Cancel	Apply				
Template Name:	6873i_dms				
Template Level:	Group				
Enterprise:	Bulk Provisioning Lab Val, Inc				
Group:	Group_G Group, Gewel				
Device Type:	Mitel 6873i (DMS)				
	Refresh Group: None pendin	IG.			
Usage Displayed B Enter Search Criteri	Device a: Search				
Enter Search Criteri	O Device				
Enter Search Criteri	Device a: Search	Tem	plate Users		
Enter Search Criteri ((All Template Assignmer	Device a: Search	Tem,	plate Users Device Level ☆	MAC Address ç	Type ≎
Enter Search Criteri ('All Template Assignmer Name ©	Device a: Search Its) Contains:	Device Mitel6873iDMS-9722221028	Device Level \$ Group		Type ≎ Primary
Enter Search Criteri (All Template Assignmer Name 😋	Device a: Search tts) Contains: Phone Number	Device Mitel6873iDMS-9722221028	Device Level 📚	MAC Address 📚	
Enter Search Criteri	Device a: Search tts) Contains: Phone Number	Device ≎ Mitel6873iDMS-9722221028 - End	Device Level ≎ Group d of Users -	MAC Address 📚	
Enter Search Criteri (All Template Assignmer Name ©	Device a: Search tts) Contains: Phone Number	Device ≎ Mitel6873iDMS-9722221028 - End	Device Level \$ Group	MAC Address 📚	

Figure 22: Template Usage Page

6. If you still want to rename the template, edit the associated users or devices to remove the template from their configuration, and then try again. The "(Rename Failed: Template In-Use)" message remains for 24 hours or until you modify the template (if a change is made or saved).

Copying a Phone Template

- 1. From the main menu, select Provisioning, and then select Phone Templates.
- 2. Click **Definitions** in the menu tree, or click **Definitions** in the Phone Templates menu. The Template Definitions page opens.
- 3. Choose the Template Level from the drop-down list.
- 4. Choose the Enterprise from the drop-down list.
- 5. Choose the Group from the drop-down list.
- 6. Choose the **Device Type** from the drop-down list. A list of Templates that were created for this device type is displayed.
- 7. For the template you want to copy, click the **Copy** link. The Template Copy page opens.

Template Copy Copy an existing phone template.	
copy an existing phone template.	
OK Cancel	
Copied Template	
Template Name:	67i Template
Template Level:	Group
Enterprise:	Bulk Provisioning Lab Val, Inc
Group:	Group_G Group, Gewel
Device Type:	Aastra 6867i
Phone Model:	Mitel (Aastra) 6867i
Description:	Template for the 6867i Aastra SIP phone
New Template	
Template Name:	67i Template
Template Level:	(Select Level)
Enterprise:	(Select Enterprise)
Group:	(Select Group) -
Device Type:	
Phone Model:	Mitel (Aastra) 6867i
Description:	Template for the 6867i Aastra SIP phone

Figure 23: Template Copy Page – New Template Section

- 8. In the New Template section of the Template Copy page, select the target Template Level.
- 9. Select the target Enterprise and Group from the drop-down lists, if necessary.
- **10.** Enter a **Name** and **Description** for the copied template.
- **11.** If there is already a template in the target Enterprise/Group with the same name, the newly copied template can replace the existing template by checking the **Replace Existing Template** box.
- **12.** Click **OK** to save the changes. The Template Definitions page opens, and the copied template appears in the list.



Note: Templates can only be copied to another Enterprise, if both the Enterprises have Template Keys set to System.

Deleting a Phone Template

- 1. From the main menu, select **Provisioning**, and then select **Phone Templates**.
- 2. Click **Definitions** in the menu tree, or click **Definitions** in the Phone Templates menu. The Template Definitions page opens.
- 3. Click the **Delete** link to delete the Phone Template selected.

Templates					
Name 💠	Level 💠	Description 🗇	Edit	Сору	Delete
<default></default>	Group		Edit	<u>Copy</u>	
Aastra6867	Enterprise		Edit	<u>Copy</u>	Delete
test	Enterprise		Edit	Copy	Delete
		- End of Templates -			

Figure 24: Template Selected to Delete

- 4. Click Delete on the Template Delete page. A confirmation dialog opens.
- 5. Click **OK**. The template is marked for deletion with "(Delete Pending)" beside the template name to indicate that OpEasy is searching for user profiles or devices that use the template. While the delete operation is pending, the template cannot be assigned, edited, or copied.

Template Defi	nitions					
Display and configure phon						
ОК						
Template Level:	Enterprise and Group 👻					
Enterprise:	Bulk Provisioning Lab Va	Bulk Provisioning Lab Val, Inc				
Group:	Group_G Group, Gewel	•				
Device Type:	Mitel 6873i (DMS)					
Phone Model:						
Rebuild Status:		nding. Enterprise: None pending.				
New Template Level:	(Select Level)					
New Template Name:		Add Template				
			Templates			
Name 👌	Level o	Description		Edit	Co	
<default></default>	Group			Edit	Co	
6873i_dms-(Delete Pend	ding) Group	73i Test_Screen_Saver				
6873i_dms BLF	Group	73i BLF Test - This One		Edit	Co	
6873i_dms Multiple_SCA	Only Group	73i BLF Test -		Edit	Co	
6873i_dms SCA Only	Group	73i BLF Test - This One		Edit	Co	
ENT 6873i dms	Enterpri	e 73i Test		Edit	Co	

Figure 25: Template Delete Pending

The search for template usage may take several minutes. Refresh the page to view the status updates. If OpEasy confirms that the template is not in use, it is deleted. However, if any references are found, "(Delete Failed: Template In Use)" appears beside the template name, with a link to the Template Usage page.

Template Defin Display and configure phone					
ОК					
Template Level: Enterprise: Group: Device Type: Phone Model: Rebuild Status: New Template Level:	Enterprise and Group TestTest - Shivu's Enterprise A_Group - Group A Aastra 6869i (DMS) Mitel (Aastra) 6869i Refresh Group: None pending. En (Select Level)	terprise: None	pending.		
New Template Name:		d Template			
New Template Name.		remplate	Lon Min o		
			Templates		
Name 💠		Level 💠	Description 💠	Edit	Сору
<default></default>		Group		Edit	<u>Copy</u>
Aastra6869_TEMPLATE_I	N_USE-(Delete Failed <u>: Template In-Use</u>)	Enterprise		Edit	Copy

Figure 26: Template Delete Failed: Template In Use

OK Cano	cel Apply							
Template Name:	6873i dms							
Template Level: Group								
enipaia cere. Siloup Enterprise: Buik Provisionina Lab Val. Inc								
	Group G Group, Gewel	.,						
Device Type:								
Rebuild Status:		nending						
Restart Phones:					I a resync or when the p	hone is rebooted.		
General Lines	Soft Keys Top Soft K		Features	I not take effect until	Template Users	hone is rebooted.		
	Soft Keys Top Soft K d By: Oser Device teria: Search					none is recorded.		
ieneral Lines Usage Displaye Enter Search Cri	Soft Keys Top Soft K d By: Oser Device teria: Search				Template Users			
General Lines Usage Displaye Enter Search Cri	Soft Keys Top Soft K d By: Oser Device teria: Search	ys Hard Keys	Features	Extra Settings	Template Users		Type ≎ Primary	

Figure 27: Template Usage Page

6. If you still want to delete the template, edit the associated users or devices to remove the template from their configuration, and then try again. The "(Delete Failed: Template In-Use)" message remains for 24 hours or until you modify the template (whether or not a change is made or saved).

Creating or Editing a Clearspan Mobile/Tablet Template

- 1. From the main menu, select **Provisioning**, and then select **Phone Templates**.
- 2. Click **Definitions** in the menu tree or click **Definitions** in the Phone Templates menu. The Template Definitions page opens.
- 3. Select a Template Level from the drop-down list.
- 4. Select the Enterprise and Group, if necessary.
- 5. Select the Device Type from the drop-down list.
- 6. Select a New Template Level from the drop-down list.
- 7. Enter the name of the template in the **New Template Name** text box.
- 8. Click Add Template. The Template Add page opens. The General tab is displayed by default.

Template Add Create a new phone template.
OK Cancel Apply
Template Name: Mobile Temp Template Level: Enterprise Enterprise: Moorehouse Moore Enterprises of Texas Device Type: Clearspan Mobile Rebuild Status: Refresh Enterprise: None pending.
General Features Extra Settings
Name: Mobile Temp Description:
General Settings
Outbound Proxy: Ves Global Settings Use DNS SRV Lookup Port (No Encryption): Port (Encryption):
Encryption (TLS/SRTP): (Use Global Settings) WARNING: Configure encryption in the network before setting Encryption to Required. Subscription Time: Use Global Settings seconds
Clearspan Settings Functionality: Audio -
Default Dialing Method VolP Mode Enabled: Default Dialing: Call Back = Image:
Contact Search Clearspan Directory: Search Enterprise Directory Search Enterprise Common Phone List Search Group Common Phone List
Search Personal Phone List M&P IM&P IM&P: Chat Enabled Presence Enabled

Figure 28: Template Add – General for Clearspan Mobile

- 9. Configure Clearspan Tablet/Mobile Settings on the General tab. Choose to Use Global Settings, or enter the Outbound Proxy, and Outbound Proxy Port in the Outbound Proxy Port (No Encryption) box when encryption is not being used by the client, or in the Outbound Proxy Port (Encryption) box when encryption is being used by the client. These optional fields can contain text up to 256 characters, as well as tags.
- 10. Select the Encryption (TLS/SRTP) setting.
- **11.** Use Global Settings for subscription time (as-feature-event), or uncheck the **Use Global Settings** check box and enter the subscription time in seconds.
- **12.** Select the **Functionality** for the device.
- 13. The VoIP Mode is enabled by default in the Default Dialing Method section. Select the Default Dialing mode. Both Call Back and Native Call options are enabled by default, uncheck the box to disable either dialing method.
- 14. The Clearspan Directory is enabled in the Contact Search section. The Search Enterprise Directory is enabled by default. Check the box Search Enterprise Common Phone List, Search Group Common Phone List and Search Personal Phone List to enable the list.

- **15.** The **IM&P** (Chat and Presence) settings are enabled by default. Uncheck the option to disable either setting.
- **16.** On the **Features** tab, enable the features for the device. All features in the **Enabled Features** and **Side Menu** list are enabled by default.
- **17.** On the **Extra Settings** tab, enter any custom configuration information for the template.
 - **Note:** OpEasy analyzes the Template Extra Settings to determine if there are any parameters in the Extra Settings that are being overridden by the Template settings. If parameters that correspond to any of the Template settings are found in the Extra Settings, then **Template Definitions: Extra Settings Audit Results** page is displayed, indicating the extra settings parameters that conflict with the Template settings configuration.
- **18.** If you are modifying an existing template, select the **Template Users** tab to display a list of users or devices that use this template. Click **OK**.

Creating or Editing a Media5 Template

- 1. From the main menu, select **Provisioning**, and then select **Phone Templates**.
- 2. Click **Definitions** in the menu tree or click **Definitions** in the Phone Templates menu. The Template Definitions page opens.
- 3. Select a Template Level from the drop-down list.
- 4. Select the Enterprise and Group, if necessary.
- 5. Select the **Device Type**:
 - Media5 4102

E2

- Media5 C710
- Media5 C711
- Media5 S724
- Mitel TA7102
- Mitel TA7104
- Mitel TA7108
- Mitel GXGateway24FXS
- 6. Select a New Template Level.
- 7. Enter the name of the template in the New Template Name text box.
- 8. Click Add Template. The Template Add page opens. The General tab is displayed by default.

Template Add Create a new phone template.						
OK Cancel Ap	ply					
Template Name: Media						
Template Level: Enterprise						
Enterprise: Moorehouse	Enterprise: Moorehouse Moore Enterprises of Texas					
Device Type: Media5 410	2 (DMS)					
Rebuild Status: Refresh	Enterprise: None pending.					
	E: If Restart Phones is unchecked, the template will not take effect until a resync or when the phone is rebooted.					
General Ports Extra Setting	gs					
Name: Media Description:						
General Settings						
Time Zone: [Use Global Settings) 🔹					
Outbound Proxy:	g Use Global Settings					
	ort (No Encryption):					
	ort (Encryption):					
Encryption (TLS/SRTP):	Use Global Settings) 💌 WARNING: Configure encryption in the network before setting Encryption to Required.					
N F 50 W						
Media 5 Settings Conference Server:	Use Global Settings)					
Voice Quality Monitoring:						
	Jisabled +					
Sys/Debug Log Host:						

Figure 29: Template Add – General for Media5

- 9. Enter the description in the **Description** text box.
- 10. Configure General Settings on the General tab.
 - Select the Time Zone from the drop-down list.
 - Choose to Use Global Settings, or enter the Outbound Proxy, and Outbound Proxy Port in the Outbound Proxy Port (No Encryption) box when encryption is not being used by the client, or in the Outbound Proxy Port (Encryption) box when encryption is being used by the client. These optional fields can contain text up to 256 characters, as well as tags.
 - Select the Encryption (TLS/SRTP) setting.
- 11. Configure Media5 Settings on the General tab.
 - Select the conference server from the Conference Server drop-down list.
 - Select the Voice Quality Monitoring check box to enable the voice quality monitoring.
 - Select Enable or Disable from the Sys/Debug Log drop-down list to enable/disable the log.
 - Enter the host name in the Sys/Debug Log Host text box.
- **12.** Configure Port Definition settings on the Ports tab.
 - By default, the **MWI** is set to Tone and Visual.
 - By default, the **Call Waiting** and **Caller ID** check boxes are all checked.
- **13.** Configure the Media5 on the Extra Settings tab.
 - On the Extra Settings tab, enter any custom configuration information for the template.

- Click the Choose File button to browse and select the file.
- Click the **Upload File** to upload the file.

2

Note: OpEasy analyzes the Template Extra Settings to determine if there are any parameters in the Extra Settings that are being overridden by the Template settings. If parameters that correspond to any of the Template settings are found in the Extra Settings, then **Template Definitions: Extra Settings Audit Results** page is displayed, indicating the extra settings parameters that conflict with the Template settings configuration.

14. Click OK.

Creating or Editing a Mitel DECT 112 Template

- 1. From the main menu, select **Provisioning**, and then select **Phone Templates**.
- 2. Click **Definitions** in the menu tree or click **Definitions** in the Phone Templates menu. The Template Definitions page opens.
- 3. Select a Template Level from the drop-down list.
- 4. Select the Enterprise and Group, if necessary.
- 5. Select the Mitel DECT 112 device from the Device Type drop-down list.
- 6. Select a New Template Level.
- 7. Enter the name of the template in the **New Template Name** text box.
- 8. Click Add Template. The Template Add page opens. The General tab is displayed by default.

Template Add Dreate a new phone template.	
OK Cancel Apply	
Template Name: Dect	
Template Level: Enterprise	
Enterprise: Moorehouse Moore Enterprises of Texas	
Device Type: Milel DECT 112 (DMS)	
Rebuild Status: Refresh Enterprise: None pending.	
Restart Phones: 🔲 NOTE: If Restart Phones is unchecked, the template will not take effect until a resync or when the phone is rebooted.	
General Lines Extra Settings	
Name: Dect Description:	
General Settings Time Zone: (Use Global Settings) *	
Use VLAN: 🔲 Warning: Enabling VLAN may cause some phones to stop operating.	
Outbound Proxy: 🐷 Use Global Settings	
Use DNS SRV Lookup	
Port	
Encryption (TLS/SRTP): (Use Global Settings) VARNING: Configure encryption in the network before setting Encryption to Required.	
Subscription Time: 🐷 Use Global Settings	
seconds	
DECT 112 Settings	
Used Made (Okana Lash) (Use Global Setting)	

Figure 30: Template Add – General for Mitel Dect 112

- 9. Enter the description in the **Description** text box.
- **10.** Configure General Settings on the General tab.
 - Select the Time Zone from the drop-down list.
 - Select Use VLAN to add support for configuring phones to use their VLAN capability.



Note: Enabling VLAN may cause some phones to stop operating.

- Choose to **Use Global Settings**, or enter the Outbound Proxy in the **Outbound Proxy** text box. Select the **Use DNS SRV Lookup** option to enter the Outbound Proxy Port in the **Port** text box. These optional fields can contain text up to 256 characters, as well as tags.
- Select the Encryption (TLS/SRTP) setting.



Note: Configure encryption in the network before setting Encryption to Required.

- Use Global Settings for subscription time (as-feature-event) or uncheck the **Use Global Settings** check box and enter the subscription time in seconds.
- **11.** Configure DECT 112 settings on the General tab.
 - Enable or Disable the Hotel Mode(Phone Lock).
 - Enable or Disable the **Repeaters**.
 - Select the **Use LDAP** check box to enable the LDAP on the Mitel DECT-112 phone, the option is disabled by default. This applies only to Mitel DECT-112 phones
- **12.** Configure Line settings on the Line tab.
 - Choose the Line Label from the Line Label drop-down list. All the handsets lines use the same line label.
 - Select the Clearspan Line Position. Handsets range from 1 to 16.
- 13. Configure Extra settings: The Extra Settings tab views or changes the configuration Information.
 - Click Browse to choose a configuration settings file that was previously created, if necessary.
 - Use the **Upload File** button to access the file. You can create a text file that contains extra settings that apply to many templates.

Creating or Editing a Clearspan Communicator Template

- 1. From the main menu, select Provisioning, and then select Phone Templates.
- 2. Click **Definitions** in the menu tree or click **Definitions** in the Phone Templates menu. The Template Definitions page opens.
- 3. Select a Template Level from the drop-down list.
- 4. Select the Enterprise and Group, if necessary.
- 5. Select the Device Type:

- Choose Business Communicator Mobile: Clearspan Communicator for iOS or Android clients,
- Choose Business Communicator PC: Clearspan Engage Desktop or Clearspan Communicator Desktop.
- Choose Business Communicator S4B: Clearspan Communicator for Desktop, Skype Add-In.
- Choose Business Communicator Tablet: Clearspan Communicator for iOS tablets.
- 6. Select a New Template Level.
- 7. Enter the name of the template in the New Template Name text box.
- 8. Click Add Template. The Template Add page opens. The General tab is displayed by default.

Template Modify Change an existing phone template.
OK Cancel Apply
Template Name: Engage_PC_Ent Template Level: Enterprise Enterprise: Bulk Provisioning Lab Val, Inc Device Type: Business Communicator - PC Rebuild Status: Refresh Enterprise: None pending.
General Features Extra Settings Template Users
Name: Engage_PC_Ent Description:
General Settings
Outbound Proxy: Use Global Settings Use DNS SRV Lookup Port (No Encryption): Port (Encryption):
Encryption (TLS/SRTP): (Use Global Settings) - WARNING: Configure encryption in the network before setting Encryption to Required.
Desktop Type
Desktop Type: Clearspan Engage Desktop Clearspan Communicator Desktop

Figure 31: Template Modify – General for CS Engage Desktop/CS Communicator Desktop

- 9. Configure General Settings on the General tab. Choose to Use Global Settings, or enter the Outbound Proxy, and Outbound Proxy Port in the Outbound Proxy Port (No Encryption) box when encryption is not being used by the client, or in the Outbound Proxy Port (Encryption) box when encryption is being used by the client. These optional fields can contain text up to 256 characters, as well as tags.
- 10. Select the Encryption (TLS/SRTP) setting.
- 11. For Device Type, Business Communicator PC, choose Desktop Type:
 - Select Clearspan Engage Desktop
 - Click OK. This closes the Edit page and saves the template. Continue with Features tab.
 - Select Clearspan Communicator Desktop

- Continue with the following Steps
- **12.** Configure Communicator Settings on the General tab. Select the **Functionality** for the client, depending on the Device Type:
 - Business Communicator Mobile: Basic, Audio, or Video
 - Business Communicator PC: Basic, Audio or Video
 - Business Communicator S4B: Video (Only General Settings and Password Update Settings is applicable)
 - Business Communicator Tablet: Basic, Audio, or Video
- **13.** In the **Chat** section, Chat can be enabled and the following:
 - Business Communicator PC
 - · Chat Recording
 - Server Based Chat History
 - Prohibit Clickable Links
 - File Transfer (Media Sharing) Enabled: Encrypt File Transfer and Prohibit File Types
 - Business Communicator Mobile
 - Chat Recording Enabled
 - Business Communicator Tablet
 - Chat and Presence
- 14. In the My Room section, My Room can be enabled and the following:
 - For Business Communicator PC
 - Guest Client: Auto accept All Guests
 - Collaboration: Participant Sharing
 - Business Communicator Mobile
 - Guest Client
- 15. On the Features tab, select the features to enable for the client.
 - Call Forward Always
 - Call Pull
 - Call Transfer
 - Clearspan Anywhere
 - Conference If enabled has the option to configure Show Participant List and Max Parties drop down options: "No Limit, 4 to 15"
 - Message Waiting Indicator
 - Voicemail
 - Visual Voicemail

16. On the Extra Settings tab, enter any custom configuration information for the template.



Note: OpEasy analyzes the Template Extra Settings to determine if there are any parameters in the Extra Settings that are being overridden by the Template settings. If parameters that correspond to any of the Template settings are found in the Extra Settings, then **Template Definitions: Extra Settings Audit Results** page is displayed, indicating the extra settings parameters that conflict with the Template settings configuration.

17. If you are modifying an existing template, select the **Template Users** tab to display a list of users or devices that use this template. Click OK.

Creating or Editing a CS Engage Mobile/Tablet Template

- 1. From the main menu, select Provisioning, and then select Phone Templates.
- Click **Definitions** in the menu tree or click **Definitions** in the Phone Templates menu. The Template Definitions page opens.
- 3. Select a Template Level from the drop-down list.
- 4. Select the Enterprise and Group, if necessary.
- 5. Select the Device Type as Connect Mobile or Connect Tablet.
- 6. Select a New Template Level.
- 7. Enter the name of the template in the **New Template Name** text box.
- 8. Click Add Template. The Template Add page opens. The General tab is displayed by default.

Template Modify Change an existing phone template.
OK Cancel Apply
Template Name: EngageMobile_Ent
Template Level: Enterprise
Enterprise: Bulk Provisioning Lab Val, Inc
Device Type: Connect - Mobile
Rebuild Status: Refresh Enterprise: None pending.
General Features Extra Settings Template Users
Name: EngageMobile_Ent
Description:
General Settings
Outbound Proxy: Use Global Settings Use DNS SRV Lookup Port (No Encryption): Port (Encryption):
Encryption (TLS/SRTP): (Use Global Settings) VARNING: Configure encryption in the network before setting Encryption to Required.

Figure 32: Template Modify – General for CS Engage Mobile/Tablet

9. Configure General Settings on the General tab.

Choose to **Use Global Settings**, or enter the Outbound Proxy, and Outbound Proxy Port in the **Outbound Proxy Port (No Encryption)** box when encryption is not being used by the client, or in the **Outbound Proxy Port (Encryption)** box when encryption is being used by the client. These optional fields can contain text up to 256 characters, as well as tags.

- 10. Select the Encryption (TLS/SRTP) setting.
- **11.** On the **Features** tab, select the features to enable for the client:
 - Enabled Features:
 - Call Back

•

- Call Center
- Call Park
- Call Pull
- Call Recording
- Call Transfer
- Conference If enabled, it has the option to configure Show Participant List and Max Parties drop down options: "No Limit, 4 to 15"
- Message Waiting Indicator
- · Voicemail If enabled, it has the option to configure Visual Voicemail
- Allow User Self Care Portal Access for:
 - Call Forward Always
 - Call Forward Busy
 - Call Forward Not Reachable
 - Call Forward No Answer
 - Clearspan Anywhere
 - Do Not Disturb
 - Anonymous Call Rejection
 - Simultaneuos Ring
 - Sequential Ring
 - Automatice Callback
 - Call Waiting
 - Caller ID Delivery Blocking
 - Personal Assistant
 - Call Center
 - Remote Office
 - Voice Messaging

12. On the Extra Settings tab, enter any custom configuration information for the template.



Note: OpEasy analyzes the Template Extra Settings to determine if there are any parameters in the Extra Settings that are being overridden by the Template settings. If parameters that correspond to any of the Template settings are found in the Extra Settings, then **Template Definitions: Extra Settings Audit Results** page is displayed, indicating the extra settings parameters that conflict with the Template settings configuration.

13. If you are modifying an existing template, select the **Template Users** tab to display a list of users or devices that use this template. Click OK.

Creating or Editing an AudioCodes Template

- 1. From the main menu, select **Provisioning**, and then select **Phone Templates**.
- 2. Click **Definitions** in the menu tree or click **Definitions** in the Phone Templates menu. The Template Definitions page opens.
- 3. Select a Template Level from the drop-down list.
- 4. Select the Enterprise and Group, if necessary.
- 5. For the **Device Type**, choose an AudioCodes device.
- 6. Select a New Template Level.
- 7. Enter the name of the template in the **New Template Name** text box.
- 8. Enter the New Template Name, and Click Add Template. The Template Add page opens.

On the General tab:

- 9. Enter the **Description** of the template.
- 10. Select the Time Zone from the drop-down list.
- 11. Select the Encryption Settings from the Encryption (TLS/SRTP) drop-down list.

Note: An error is displayed when the number of ports exceeds the maximum number of encryption ports supported when the Encryption Settings is set to Required or Use Global Settings, where the Global Settings encryption is set to Required.

Maximum number of AudioCodes ports supported when encryption is used is listed in the following table:

DEVICE TYPE	MAXIMUM NUMBER OF ANALOG PORTS	MAXIMUM ENCRYPTION PORTS SUPPORTED
AudioCodes MP 112	2	2
AudioCodes MP 114	4	3
AudioCodes MP 118	8	6
AudioCodes MP 124	24	18
AudioCodes MP 124E	24	16

Ż

DEVICE TYPE	MAXIMUM NUMBER OI ANALOG PORTS	F MAXIMUM ENCRYPTION PORTS SUPPORTED
AudioCodes MP 1288	288	288

- **12.** Enter the certificate filename in the **Encryption Certificate File** for the device type. Contact your Supervisor for the Encryption Certificate File name.
- 13. Select the Audiocodes Settings that you want to enable.
 - Survivable Mode: Enables the AudioCodes device for survivability. When this box is selected, Stand-Alone Survivability is enabled using the configuration in the AudioCodes Global Settings.
 - 3-Way Conference: Enables 3-way conferencing. Select the Conference Server from the from the Conference Server drop-down list or choose Use Global Settings.
 - Message Waiting Indicator: Enables the Message Waiting Indicator (MWI).
 - FAX Support: Enables FAX support.
 - Voice Quality Monitoring: Enables voice quality monitoring. When this box is selected, Voice Quality Monitoring is enabled using the configuration information in the AudioCodes Global Settings.
- 14. Select Use Global Settings to use the global settings for External Proxy, or uncheck Use Global Settings check box, enter the External Proxy, and the External Proxy Port with encryption or External Proxy Port without encryption, and External Backup Proxy 1, External Backup Proxy 2, External Backup Proxy 3, and External Backup Proxy 4 values. These optional fields can contain text up to 256 characters, as well as tags.

Template Add
Create a new phone template.
Template Name: Audiocode114
Template Level: Enterprise
Enterprise: Moorehouse Moore Enterprises of Texas
Device Type: AudioCodes MP114Combo (DMS)
Rebuild Status: Refresh Enterprise: None pending.
Restart Phones: 🔲 NOTE: If Restart Phones is unchecked, the template will not take effect until a resync or when the phone is rebooted.
General Ports Groups Extra Settings
Name: Audiocode114
Description:
Description.
General Settings
Time Zone: (Use Global Settings) 👻
Encryption (TLS/SRTP): (Use Global Settings) 👻 WARNING: Configure encryption in the network before setting Encryption to Required.
Encryption Certificate File:
AudioCodes Settings
Survivable Mode: 🔲
3-Way Conference: 👿
Conference Server: (Use Global Settings) *
Message Waiting Indicator: 🐷
FAX Support:
Voice Quality Monitoring:
External Proxy: 👿 Use Global Settings
Port (No Encryption):
Port (Encryption):
External Backup Proxy 1:
External Backup Proxy 2:
Evternal Bankin Provi 9-

Figure 33: Template Add – General for AudioCodes

- **15.** In the Ports tab, configure the **Group Number** for each port. The same group may be assigned to more than one port. When creating a template, the Groups tab should be filled out first so you can create the groups referenced on the Ports tab.
- 16. Call Waiting and Caller ID are enabled by default.

	empla eate a new							
	OK	Ca	ncel	Apply				
	Ter		el: Enterprise e: Moorehou e: AudioCod	e ise Moore Enterprise es MP114Combo (DM:	S)			
		build Statu		Enterprise: None pe	-	emplate will not take	e effect until a resync or when the phone is rebooted.	
1	General Ports Groups Extra Settings							
				Port Definitions				
	Por	t	Type Group Number Call Waiting Caller ID					
	1		FXS	1 -	~	~		

Figure 34: Template Add – Ports for AudioCodes

- **17.** In the Groups tab, choose the **Channel Select Mode** for each group.
 - By Destination Phone Number The channel is selected according to the called (destination) number. If the number is not located, the call is released. If the channel is unavailable (busy), the call is put on call waiting (if call waiting is enabled and no other call is on call waiting); otherwise, the call is released.
 - Cyclic Ascending The next available channel in the Hunt Group, in ascending cyclic order, is selected. After the device reaches the highest channel number in the Hunt Group, it selects the lowest channel number in the Hunt Group, and then starts ascending again.
 - Ascending The lowest available channel in the Hunt Group is selected, and if unavailable, the next higher channel is selected.
 - Cyclic Descending The next available channel in descending cyclic order is selected. The
 next lower channel number in the Hunt Group is always selected. When the device reaches
 the lowest channel number in the Hunt Group, it selects the highest channel number in the
 Hunt Group, and then starts descending again.
 - Descending The highest available channel in the Hunt Group is selected, and if unavailable, the next lower channel is selected.
 - Destination Number + Cyclic Ascending The channel is selected according to the called number. If the called number isn't found, the next available channel in ascending cyclic order is selected.
 - Source Phone Number The channel is selected according to the calling number.
 - Ring to Hunt Group The device allocates IP-to-Tel calls to all the FXS ports (channels) in the Hunt Group. When a call is received for the Hunt Group, all telephones connected to the FXS ports belonging to the Hunt Group start ringing. The call is eventually received by whichever telephone first answers the call (after which the other phones stop ringing). This option is applicable only to FXS interfaces.
 - Destination Number + Ascending The device allocates a channel to incoming IP-to-Tel calls as follows:
 - The device attempts to route the call to the channel that is associated with the destination (called) number. If located, the call is sent to that channel.
 - If the number is not located or the channel is unavailable (busy), the device searches in ascending order for the next available channel in the Trunk Group. If located, the call is sent to that channel.
 - If all the channels are unavailable, the call is released.

Template A Create a new phone t								
ОК	OK Cancel Apply							
Template N Template L Enterp Device Rebuild St Restart Pho General Ports	evel: Enterprise prise: Moorehouse Moore E Type: AudioCodes MP114Cor atus: Refresh Enterprise: pnes: NOTE: If Restar	hbo (DMS) None pending Phones is un	g.	will not take effect until	a resync or when the p	phone is rebooted.		
			Group Definition:	5				
Group								
1								
2	2 Destination Phone Number							
3	Cyclic Ascending					V		
4	 Ascending Cyclic Descending 					V		
Descending - End of Groups - Dest Number + Cyclic Ascending								

Figure 35: Template Add – Groups for AudioCodes

- **18.** Select the Group Definitions for each group.
 - Channel Mode: Destination Phone Number is set by default.
 - Reverse Polarity: Enables or disables the reverse polarity signaling used by the ports in the group. If enabled the FXS interface changes the line polarity on call answer and then changes it back on call release. The FXO interface sends a 200 OK response when polarity reversal signal is detected (applicable only to one-stage dialing) and releases a call when a second polarity reversal signal is detected. By default, the Reverse Polarity is set to Disabled.
 - Current Disconnect: Enables or disables the detection of the current disconnect signal by the ports in the group. If enabled the FXO interface releases a call when a current disconnect signal is detected on its port, and the FXS interface generates a 'Current Disconnect Pulse' after a call is released from IP. By default, the Current Disconnect is set to Enabled.
 - Two Stage Dial: Enables or disables Two Stage Dial for the ports in the group. With Two Stage Dial, the caller is presented with a secondary dial tone and must enter additional digits to reach the destination. By default the Two Stage Dial is set to Disabled.
 - Register: Indicates whether the endpoints in the group are to register. By default, Register is set to Enabled.

19. On the **Extra Settings** tab, enter any custom configuration information for the template.



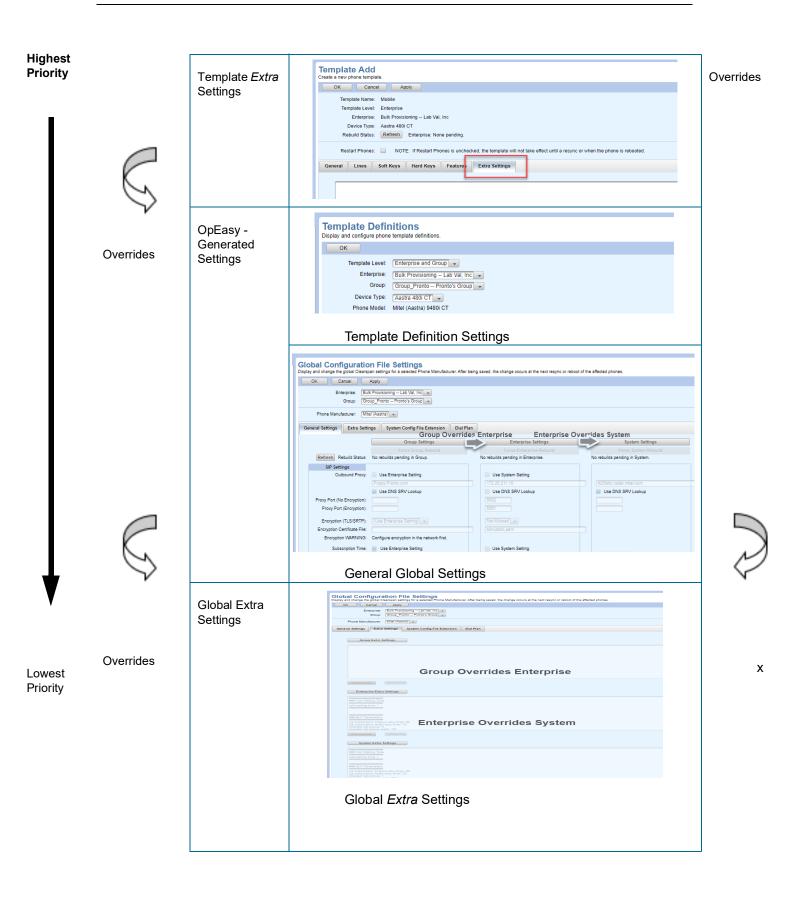
Note: OpEasy analyzes the Template Extra Settings to determine if there are any parameters in the Extra Settings that are being overridden by the Template settings. If parameters that correspond to any of the Template settings are found in the Extra Settings, then **Template Definitions: Extra Settings Audit Results** page is displayed, indicating the extra settings parameters that conflict with the Template settings configuration.

20. If you are modifying an existing template, select the **Template Users** tab to display a list of users or devices that use this template. Click **OK**.

Viewing or Editing Global Settings

The Global Settings page allows you to view or change the global Clearspan settings at the System, Enterprise, and Group levels. After being saved, the change for the individual phones occurs at the next scheduled re-sync or reboot of the phones.

This feature should not be used without a thorough understanding of the device configuration files. All settings on the Global Configuration File Settings pages are optional, and some of them override others. For duplicated and conflicting configuration information, the following hierarchy is applied when creating the configuration file for the device



System configuration File Extension Settings	Global Configuration File Settings Display and change the global Clearspan settings for a selected Phone Manufacturer. After being saved, the change occurs at the next resync or reboot of OK Cancel Apply Enterprise: Bulk Provisioning – Lab Vel, Inc. Group: Group. Fronto – Pronto S Group. Phone Manufacturer: Mitel (Aastra).
	General Settings Extra Settings System Config File Extension Dial Plan System Config File Extension #Play dial tone when xfericonf initiated confider live dial: 1 1

To view or edit global settings, General tab:

- 1. From the main menu, select Provisioning, and then select Phone Templates.
- 2. Select Global Settings from the Phone Templates menu. The Global Configuration File Settings page opens.
- 3. Select the Enterprise from the drop-down list.
- 4. Select the Group from the drop-down list.
- 5. Select the **Phone Manufacturer**. The available manufacturers depend on the device types configured for the Enterprise.
- 6. To change any global configuration settings on the General Settings tab, an Admin with the privilege clicks the **System/Enterprise/Group Settings** button and makes the corrections required.
- 7. You can click **Force System Rebuild**, **Force Enterprise Rebuild**, or **Force Group Rebuild** to rebuild the configuration files for the selected phone manufacturer without making any changes. Rebuild Status is shown on the Template pages and Global Settings page.

The following sections describe the global settings for Mitel phones, Clearspan Mobile, Mitel DECT, Mitel MiVoice, Clearspan Communicator, CS Engage, AudioCodes and Media5 devices. For global settings information for Panasonic and Polycom phones, refer to Phone Templates: Global Settings for Panasonic Phones, System, Enterprise, and Group Global Settings for Polycom Phones and System, Enterprise, and Group Global Settings for Cisco Phones.



Note: The *.conf file format is not supported in extra settings.

- 8. Click OK or Apply.
- **9.** The Global Configuration File Settings: Rebuild Configuration Files page displays, click **Save** and **Rebuild** to save the changes and start the configuration file rebuild process, or click **Cancel**.

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Note: This applies only to Group and Enterprise, and does not display for System Settings.

Rebuild Status is shown on the Template pages and Global Settings page.



Figure 36: Global Configuration File Settings: Rebuild Configuration Files Page

Editing System, Enterprise, and Group Extra Settings

Extra Settings are applied to all the Mitel Phones, MiVoice Conference Phones, Mitel DECT-112 phones, Audiocodes and Media5 devices.

- 1. From the main menu, select Provisioning, the Provisioning menu is displayed.
- 2. Select Phone Templates, the Phone Templates menu is displayed.
- 3. Select Global Settings. The Global Configuration File Settings page is displayed.
- 4. Select the Enterprise from the drop-down list, if needed.
- 5. Select the Group from the drop-down list, if needed.
- 6. Select the **Phone Manufacturer**. The available manufacturers depend on the device types configured for the Enterprise.

Note:

2

- The Admin must have the permission to edit Extra Settings.
- Only Group Administrators and above can modify Group Extra Settings
- · Only Enterprise Administrators and above can modify Enterprise Extra Settings
- Only System Administrators and above can modify System Extra Settings
- 7. Click the Extra Settings tab. The Extra Settings page is displayed.
- 8. Click the **Group, Enterprise or System Extra Settings** button. A confirmation box is displayed, "Updating Extra Settings is potentially dangerous. Are you sure you want to update Extra Settings?".
- **9.** Click **Yes** to edit the Group, Enterprise or System Extra Settings. The Group, Enterprise or System Extra Settings are enabled.
- 10. Enter the extra settings in the Group, Enterprise or System Extra Settings box.
- **11.** Click **Apply or OK**. If the Group or Enterprise Extra Settings were changed, then the Global Configuration File Settings: Rebuild Configuration Files page is displayed.
- 12. Click the Save and Rebuild button.

 If the Extra Settings are overriding any parameter in the General Settings or Dial Plan setting, the Global Configuration File Settings: Extra Settings Audit Results page is displayed.

Global Configuration File Settings Display and change the global Clearspan settings for a selected Phone Manufacturer. After being saved, the change occurs at the next resync or reboot of the affected phones.
OK Cancel Apply
Enterprise: clearspanlab - Clearspan LAB • Group: sales organization • Sales Organization •
Phone Manufacturer: (Mitel (Aastra) +
General Settings Extra Settings System Config File Extension Dial Plan
Group Extra Settings
Choose File Upload File
Enterprise Extra Settings
#Registrations #Registrations sip registration renewal timer: 30 sip intel registration period: 3800
sip line2 registration period: 3000 sip line3 registration period: 3800 sip line4 registration period: 3800
SIP-QoS tos sip: 48
Aastra Phones' Internal DNS Records
Choose File Upload File
System Extra Settings
####################################

Figure 37: Global Extra Settings for Mitel Phones

OpEasy analyzes the Group, Enterprise, or System Extra Settings to determine if the parameters in the Extra Settings are being overridden by the General Settings or Dial Plan Settings. If parameters that correspond to any of the General Settings or Dial Plan Settings are found in the Global Extra Settings, then the **Global Configuration File Settings: Extra Settings Audit Results** page is displayed, indicating the extra settings parameters that conflict with the Global Settings configuration.

	Jration File Settings: Extra Settings Audit Results udit of the Group Extra Settings to determine if any content configured in Extra Settings is in conflict with settings configured in the Group Global Settings.
OK	
Enterprise:	TestTest
Group:	A_Group
Phone Manufacturer:	Mitel (Aastra)
The following Group removed from the G	o Global Extra Settings content is being OVERRIDDEN by the Group General Settings configuration or Group Dial Plan settings. The specified content should be roup Global Extra Settings:
The following Group removed from the Group time zone name: Cus time zone minutes: 3	stom
time zone name: Cus	stom
time zone name: Cus time zone minutes: 3	stom
time zone name: Cus time zone minutes: 3	stom

Figure 38: Global Configuration File Settings: Extra Settings Audit results page

System Configuration File Extension

The System Configuration File Extension settings are an extension of the system-wide phone configuration file specific to each phone manufacturer (such as "startup.cfg" for Mitel phones).

This tab only appears for the following devices:

- Mitel Settings extend the "startup.cfg" file.
- Polycom Phones Settings extend the "sys.cfg" file.
- Panasonic Phones Settings extend the "KX-TGP600.cfg" file.
- Cisco Phones

Just as with the phone configuration files, the settings on the Extension tab have a lower-priority than ALL other Global Settings (including Global Extra Settings) and Template Settings. However, the Extension tab settings have higher-priority than the settings in the phone configuration file being extended. Unlike changes to other Global Settings, when settings in the System Config File Extension tab are changed, the configuration file for all affected phones will NOT be rebuilt. Instead, the next time each phone's configuration file is rebuilt, it will include the System Config File Extension settings.

System, Enterprise, and Group Mitel Phone Global Settings

The Global Configuration File Settings page contains the following settings for Mitel phones:

- SIP Settings
 - Outbound Proxy
 - Use DNS SRV Lookup
 - Proxy Port (No Encryption) and Proxy Port (Encryption)
 - Encryption settings
 - Encryption Certificate File (Name for certificate file. Must be entered if Encryption is set to Required)
 - Subscription Time (as-feature-event).
- Time Settings
 - Time Server 1 are text fields that contain the FQDN/IP address of the Time Server.

- Time Server 2 are text fields that contain the FQDN/IP address of the Time Server.
- Time Server 3 are text fields that contain the FQDN/IP address of the Time Server.
- Time Zone
- Device Settings
 - LAN Port Mode
 - Admin Password. Valid password characters are a-z, A-Z, 0-9, or special characters (dash), _ (underscore), (period), or @ (at symbol).
 - Confirm Admin Password
 - User Password. Valid password characters are a-z, A-Z, 0-9, or special characters (dash), _ (underscore), (period), or @ (at symbol).
 - Confirm User Password
 - Web Interface enables/disables the web interface for the phone
 - Phone Lock enables/disables the ability to lock the phone
- Voice Codecs
 - Voice Codec #1 (highest priority)
 - Voice Codec #2
 - Voice Codec #3
 - Voice Codec #4 (lowest priority).
- Quality Monitoring
 - Quality Monitoring
 - Collector Server Address. The Collector Server Address is the fully qualified domain name
 - Collector Server Port
- General Settings
 - If Static Call Park/Pickup is enabled, Park and Pickup keys appear on the phone automatically without the need to specifically define a Park or Pickup key. If you enable this setting when those keys are also defined, then two Park/Pickup keys appear on the phone.
 - Conference Server is the conference server to be used for conference calls. The drop-down-list shows all configured conference servers.
 - Firmware Server is a text field that contains the location of the firmware to be loaded.
 - Image Server is a text field that contains the URI of the image server where pictures are stored for the display on the phone during incoming and outgoing calls, in the Directory, Received Callers list, and Outgoing Redial List entries. This applies to 6867i, 6869i, 6873i series phones and 6900 series phones. The requirements for the file are as follows:
 - · Pictures must be PNG format
 - 150x150 pixels
 - 24 or 32-bit color
 - Filenames must be stored using the phone number as the filename (for example, 9995551234.png)
 - Upload System Info on Crash
 - Upload System Info Server contains the location where the phone sends the system and crash files (server.cfg, local.cfg, and crash.gz) if Upload System Info On Crash is enabled.

- Directory Settings
 - Resync Start Time (00:00 23:59)
 - Resync Frequency (1 364 days)
 - Resync Window length (120 1439 mins)

OK Cancel	Apply		
	Apply		
Enterprise:	Bulk Provisioning – Lab Val, Inc 👻		
Group:	Group_Pronto Pronto's Group 👻		
Phone Manufacturer:	Mitel (Aastra) 👻		
There manadatarer.			
eneral Settings Extra S	ettings System Config File Extension Dial Plan		
	Group Settings	Enterprise Settings	System Settings
	Force Group Rebuild	Force Enterprise Rebuild	Force System Rebuild
Refresh Rebuild Statu	is: No rebuilds pending in Group.	No rebuilds pending in Enterprise.	No rebuilds pending in System.
SIP Settings			
Outbound Pro:	ry: Use Enterprise Setting	Use System Setting	
	Poppy.Pronto.com	172.20.211.10	tb20sbc.cslab.mitel.com
	Use DNS SRV Lookup	Use DNS SRV Lookup	Use DNS SRV Lookup
Proxy Port (No Encryptio	n):	5082	
Proxy Port (Encryptio			
Encryption (TLS/SRT): (Use Enterprise Setting) -	Not Allowed 👻	
Encryption Certificate Fi		sonussbc.pem	
Encryption WARNIN	G: Configure encryption in the network first.		
Subscription Tim		Use System Setting	
(as-feature-eve		382	360
Time Settings			
Time Server Settings	s: 📝 Use Enterprise Setting	Use System Setting	
Time Server		che cyntan cenng	172.20.209.31
Time Server			172.20.208.41
Time Server			172.20.209.32
Time Zor		(User Time Zone) 👻	(GMT-06:00) (US) Central Time *
Time 201	(Ose Enterprise Setting)		
Device Setting			
LAN Port Mod	e: (Use Enterprise Setting)	Auto +	Auto +
Erer of all	Use Enterprise Setting Password	Use System Setting Password	
Admin Passwo		assisted assisted	
Confirm Admin Passwo			
Contirm Admin Passwo			
	Use Enterprise Setting Password	Use System Setting Password	
User Passwo			
Confirm User Passwo			*****
Web Interfac		(Use System Setting)	Enabled 👻
Phone Los	k: (Use Enterprise Setting) 🔹	(Use System Setting) 👻	Allow Use of Phone Lock +
Voice Codecs			
Voice Codec Settin	g: 📝 Use Enterprise Setting	Use System Setting	
Voice Codec #	1: (None) (highest priority)	(None) (highest priority)	G711 u-law v (highest priority)
Voice Codec #	2: (None) -	(None) 👻	G729A -
Voice Codec #	3: (None) -	(None) 👻	G722 -
Voice Codec #	4: (None) - (lowest priority)	(None) v (lowest priority)	(None) - (lowest priority)
Quality Monitoring			
Quality Monitorin		Off 💌	On 👻
Collector Server Addres		poppypop@labval.mitel.com	telchemy@tb20hq.aastra.com
Collector Server Po	rt: 5080		
General Settings	Alex Esternics Cation	(Teebled)	(Texhind
	(Use Enterprise Setting)	Enabled •	Enabled +
	er: (Use Enterprise Setting) *	Aastra - conference@%8WHOST-1% +	Aastra - conference@%BWHOST-1% 💌
Firmware Serv	er: 🔄 Use Enterprise Setting	Use System Setting http://tb20ems.cslab.mitel.com/web/MitelFW3.3.1.43	
harris 0	un 🖂 Line Enternées Catile		https://tb20ems.cslab.mitel.com/web/MitelFW3.3
Image Serv	er: 🗑 Use Enterprise Setting	Use System Setting http://172.20.208.41/DN_Images	
Lieland Sustan Jafa Ca. Com	h: (Use Enterprise Setting) +	(Use System Setting) -	Disabled +
Upload System Into On Cras Upload System Info Serv		(cae dystem detung)	
Directory Settings			
Directory Setting	gs: 📝 Use Enterprise Setting	Use System Setting	
Resync Start Tin	e: (00:00–23:59)		00:00
Resync Frequen			
Resync Window Leng			
mins)			120

Figure 39: Global Configuration File Settings Page – Mitel Phones

System, Enterprise, and Group Mitel MiVoice Conference Phone Global Settings

The Global Configuration File Settings page contains the following settings for Mitel MiVoice phones:

- SIP Settings
 - Outbound Proxy
 - Use DNS SRV Lookup
 - Outbound Proxy Port
- Time Settings
 - Time Server
 - Time Zone
- Voice Codecs
 - Voice Codec #1 (highest priority),
 - Voice Codec #2
 - Voice Codec #3
 - Voice Codec #4 (lowest priority)
- General Settings
 - Firmware Server is a text field that contains the location of the firmware to be loaded.

System, Enterprise, and Group Mitel Dect-112 Global Settings

The Global Configuration File Settings page contains the following settings for Mitel DECT-112 devices:

- SIP Settings
 - Outbound Proxy (enter the Outbound Proxy server address)
 - Use DNS SRV Lookup
 - Proxy Port
 - Encryption Settings
 - Subscription Time
- Time Settings
 - Time Server
 - Time Zone
- Device Settings
 - Admin Password (Valid password may contain text with a maximum of 15 characters)
 - Confirm Admin Password
 - Handset Registration Code If not configured, the Handset Registration Code will be populated.
 - Hotel Mode (Phone Lock)
 - Repeater 1 with enable and disable options

- Repeater 2 with enable and disable options
- Repeater 3 with enable and disable options
- General Settings
 - Firmware Server Settings
 - Firmware file server location
 - Base Station/Handset Firmware Version
 - Base Station/Handset Firmware Branch
 - Repeater Firmware Version
 - Repeater Firmware Branch are entered when the Firmware Server Settings is not selected to use the higher-level setting



Note: The base station file, and the handset firmware file version and branch must be the same.

System, Enterprise, and Group AudioCodes Global Settings

The Global Configuration File Settings page contains the following settings for AudioCodes MP-1xx devices:

- SIP Settings
 - External Proxy
 - Proxy Port (No Encryption)
 - Proxy Port (Encryption)
 - External Backup Proxy 1
 - External Backup Proxy 2
 - External Backup Proxy 3
 - External Backup Proxy 4
 - Local SIP Port
 - Local SIP TLS Port
 - Encryption (TLS/SRTP) settings for Group and Enterprise Settings
 - Encryption Certificate File (Name for certificate file. Must be entered if Encryption is set to Required)
- Stand-Alone Survivability
 - Local SIP Port
 - Local SIP TLS Port
 - SAS Local SIP Port
 - SAS Local SIP TLS Port
 - SAS Default Gateway Settings
 - SAS Default Gateway
 - SAS Default Gateway Port
- DNS Servers
 - DNS Server Settings
 - Primary DNS Server

- Secondary DNS Server
- Time Settings
 - Time Server Settings
 - Time Server
 - Backup Time Server
 - Time Zone
- Device Settings
 - LAN Port Mode
- Voice Codecs
 - Voice Codec Settings
 - Voice Codec #1 (highest priority)
 - Voice Codec #2
 - Voice Codec #3
 - Voice Codec #4 (lowest priority)
- SNMP Settings
 - SNMP Traps
 - SNMP Server 1
 - SNMP Server 2
 - SNMP Server 3
 - SNMP Server 4
 - SNMP Server 5
- Quality Monitoring
 - Quality Monitoring (Session Only or Session and Periodic)
- General Settings
 - Conference Server is the conference server to be used for conference calls. The drop-down list shows all configured conference servers.

System, Enterprise, and Group Media5 Global Settings

The Global Configuration File Settings page contains the following settings for Medi5 devices:

- SIP Settings
 - Outbound Proxy server address
 - Proxy Port (No Encryption)
 - Proxy Port (Encryption)
 - Encryption (TLS/SRTP)
- DNS Servers
 - DNS Server Settings
 - DNS Server 1
 - DNS Server 2

- DNS Server 3
- DNS Server 4
- Time Settings
 - Time Server 1
 - Time Server 2
 - Time Server 3
 - Time Server 4
 - Time Zone
- Device Settings
 - Admin Password
 - Confirm Admin Password
 - Public Password
 - Confirm Public Password
- Voice Codecs
 - Voice Codec Settings
 - Voice Codec #1
 - Voice Codec #2
- SNMP Settings
 - SNMP Traps
 - SNMP Server 1
 - SNMP Server 2
 - SNMP Server 3
 - SNMP Server 4
 - SNMP Server5
- Quality Monitoring
 - Quality Monitoring
 - Collector Server Address
- General Settings
 - Conference server
 - Firmware version for all types of Mitel Media5/Media5 devices
 - TA7102 / 4102
 - TA7104 / C710
 - TA7108 / C711
 - GX Gateway 24FXS / S724

System, Enterprise, and Group Clearspan Communicator Global Settings

The Global Settings: Clearspan Communicator pages contain the following settings for Clearspan Communicator devices:

- SIP Settings
 - Outbound Proxy
 - Use DNS SRV Lookup
 - Proxy Port (No Encryption)
 - Proxy Port (Encryption)
 - Encryption (TLS/SRTP)
- Codecs
 - Adaptive Quality (Mobile and Tablet only)
 - Voice Codec Setting
 - Voice Codec #1 (highest priority),
 - Voice Codec #2
 - Voice Codec #3
 - Voice Codec #4
 - Voice Codec #5 (lowest priority)
- Quality Monitoring
 - Quality Monitoring
 - Collector Server Address. The Collector Server Address is the fully qualified domain name
 - Collector Server Port
- Miscellaneous
 - Emergency Number List (Desktop and S4B only). Select **Use Enterprise Settings** or enter the list of emergency numbers separated by commas. The Emergency Calling feature can be enabled or disabled in the template.

System, Enterprise, and Group CS Engage Global Settings

An Admin has to select CS Engage PC or CS Engage Mobile in the Global settings. The Global Configuration File Settings page contains the following settings for CS Engage Desktop/Mobile:

- SIP Settings
 - Outbound Proxy
 - Use DNS SRV Lookup
 - Proxy Port (No Encryption)
 - Proxy Port (Encryption)
 - Encryption (TLS/SRTP)
- Codecs
 - Voice Codec Setting
 - Voice Codec #1 (highest priority),
 - Voice Codec #2
 - Voice Codec #3
 - Voice Codec #4
 - Voice Codec #5 (lowest priority)

System, Enterprise, and Group Clearspan Mobile/Tablet

The Global Configuration File Settings page contains the following settings for Clearspan mobile and tablet:

- SIP Settings
 - Outbound Proxy
 - Use DNS SRV Lookup
 - Proxy Port (No Encryption)
 - Proxy Port (Encryption)
 - Encryption (TLS/SRTP)
 - Subscription Time
- Codecs
 - Voice Codecs Setting
 - Voice Codec #1 (highest priority)
 - Voice Codec #2
 - Voice Codec #3
 - Voice Codec #4
 - Voice Codec #5 (lowest priority)
- Quality Monitoring
 - Quality Monitoring
 - Collector Server Address. The Collector Server Address is the fully qualified domain nameF
 - Collector Server Port

Dial Plans

A dial plan is the expected sequence of digits dialed from a phone to make calls or activate certain features. The Global Settings: Dial Plans page allows you to view or change the dial plans at the System, Enterprise, or Group level, for a selected Phone Manufacturer. This setting is available for Mitel, MiVoice, Media5 and AudioCodes devices.



Note: For information about Dial Plans specific to Panasonic, Polycom and Cisco phones, refer to the Appendices of this guide.

Mitel Phones

- 1. From the main menu, select **Provisioning**, and then select **Phone Templates**.
- 2. Select **Global Settings** from the Phone Templates menu. The Global Configuration File Settings page opens.
- 3. Select the Enterprise and Group from the drop-down lists.
- 4. Select Mitel phone from the **Phone Manufacturer.** The available manufacturers depend on the device types configured for the Enterprise.
- 5. Click the **Dial Plan** tab. The Dial Plan page is displayed.

Slobal Configuration File Settings isplay and change the global Clearspan settings for a selected Phone Manufacturer. After being saved, the change occurs at the next resync or reboot of the affected phones.
OK Cancel Apply
Enterprise: Moorehouse Moore Enterprises of Texas
Group: Relyks x
Phone Manufacturer: Mitel (Aastra)
General Settings Extra Settings System Config File Extension Dial Plan
Refresh Line Mode
Group Dial Plan
Dial Plan Settings: 😸 Use Enterprise Setting
Digit Timeout: 4 seconds -
Clear Copy Paste
Enterprise Dial Plan
Dial Plan Settings: W Use System Setting
Digit Timeout: 4 seconds
System Dial Plan
Digit Timeout: 4 seconds •
qwertyui
Mitel Phone Dial Plan
Enter a dial plan consisting of one or more digit patterns. When in Block Mode, the digit patterns must be separated by a symbol, such as [01]DOX(91)XOOOOOOOX(POX. When in Line Mode, each digit pattern is displayed on a separate line and the administrator only needs to enter the symbol when entering more than one digit pattern on a line. Otherwise, OpEasy automatically adds the symbol between the digit patterns.
Use the following in the digit patterns:

Figure 40: Global Configuration File Settings: Dial Plans Tab for Mitel Phones

- 6. Click the Group Dial Plan, Enterprise Dial Plan or the System Dial Plan to modify the dial plans.
 - Use the **Clear** button to delete a dial plan.
 - Use the **Copy** and **Paste** buttons to copy an existing dial plan to another field.
 - Use the Line Mode and Block Mode buttons to toggle between the two format views.
 - Enter or change the **Digit Timeout** values as required. The Digit Timeout is the time that the phone waits between key presses before timing out and returning to the idle state.

If values are entered in multiple fields, Enterprise settings take precedence over System settings, Group settings take precedence over System and Enterprise settings, and phone template Extra Settings take precedence over all others.

7. Dial Plan changes might also require changes to the configuration settings in the Phone Number Formatting phone application. Contact your system administrator. If modifications have been made, click **OK**. If no modifications have been made, or you want to cancel your changes, click **Cancel**.

Mitel MiVoice

- 1. From the main menu, select **Provisioning**, and then select **Phone Templates**.
- 2. Select **Global Settings** from the Phone Templates menu. The Global Configuration File Settings page opens.
- 3. Select the Enterprise and Group from the drop-down lists.

- Select Mitel MiVoice from the Phone Manufacturer. The available manufacturers depend on the device types configured for the Enterprise.
- 5. Click the **Dial Plan** tab. The Dial Plan page is displayed.

Global Configuration File Settings Display and change the global Clearspan settings for a selected Phone Manufacturer. After being saved, the change occurs at the next resync or reboot of the affected phones.
OK Cancel Apply
Enterprise: Moorehouse Moore Enterprises of Texas + Group: Relyks +
Phone Manufacturer: Mitel Milvoice
General Settings Extra Settings Dial Plan
Refresh Line Mode
Group Dial Plan
Dial Plan Settings: 👿 Use Enterprise Setting
Clear Copy Paste
Enterprise Dial Plan Dial Plan Setting
Lief Heil Geurigs. 📰 Ose dystem Geuring
System Dial Plan
100C200C3D0C310C320C33000C340C350C370C380C370C380C400C65C97255500C5200000000C830000000C5400000000550000000 XC68000000005757000000005800000000051200000000512000000005130000000005140000000005150000000005315000000000531 X0000000053180000000053180000000051300570X
Mitel MiVnice Phone Dial Plan

Figure 41: Global Configuration File Settings: Dial Plans Tab for Mitel MiVoice

- 6. Click the Group Dial Plan, Enterprise Dial Plan or the System Dial Plan to modify the dial plans.
 - Use the **Clear** button to delete a dial plan.
 - Use the Copy and Paste buttons to copy an existing dial plan to another field.
 - Use the Line Mode and Block Mode buttons to toggle between the two format views.

If values are entered in multiple fields, Enterprise settings take precedence over System settings, Group settings take precedence over System and Enterprise settings, and phone template Extra Settings take precedence over all others.

7. Dial Plan changes might also require changes to the configuration settings in the Phone Number Formatting phone application. Contact your system administrator. If modifications have been made, click **OK**. If no modifications have been made, or you want to cancel your changes, click **Cancel**.

Media5

- 1. From the main menu, select **Provisioning**, and then select **Phone Templates**.
- 2. Select **Global Settings** from the Phone Templates menu. The Global Configuration File Settings page opens.
- 3. Select the Enterprise and Group from the drop-down lists.
- 4. Select Media5 from the **Phone Manufacturer**. The available manufacturers depend on the device types configured for the Enterprise.

Global Configuration File Settings
Display and change the global Clearspan settings for a selected Phone Manufacturer. After being saved, the change occurs at the next resync or reboot of the affected phones.
OK Cancel Apply
Enterprise: Moorehouse – Moore Enterprises of Texas
Group: Relyks +
Phone Manufacturer. Media5 💌
General Settings Extra Settings Dial Plan
Refresh
Group Dial Plan
Dial Plan Settings: 🚽 Use Enterprise Setting
Dial Plan 1 (Emergency):
Dial Plan 2:
Dial Flan 3:
Dial Plan 4:
Dial Plan 6: Dial Plan 7:
Dial Plan 8:
Dial Plan 9:
Dial Fian 10
Darran IV.
Enterprise Dial Plan
Dial Plan Settings: 📝 Use System Setting
Dial Plan 1 (Emergency):
Dial Plan 3:
Dial Plan 4:
Dial Plan 5:
Dial Plan 6:
Dial Plan 7:
Dial Plan 8:
Dial Plan 9:
Dial Plan 10:
System Dial Plan
Dial Plan 1 (Emergency):
Dial Plan 2: Dial Plan 3:
Dial Plan 3:
Dial Plan 4: Dial Plan 5:
Dial Plan 5: Dial Plan 6:
Diar Fian 0.

5. Click the **Dial Plan** tab. The Dial Plan page is displayed.

Figure 42: Global Configuration File Settings: Dial Plans Tab for Media5

- 6. Click the Group Dial Plan, Enterprise Dial Plan or the System Dial Plan to modify and enter the number for the dial plans.
- 7. Dial Plan changes might also require changes to the configuration settings in the Phone Number Formatting phone application. Contact your system administrator. If modifications have been made, click **OK**. If no modifications have been made, or you want to cancel your changes, click **Cancel**.

AudioCodes

- 1. From the main menu, select **Provisioning**, and then select **Phone Templates**.
- 2. Select **Global Settings** from the Phone Templates menu. The Global Configuration File Settings page opens.
- 3. Select the Enterprise and Group from the drop-down lists.
- 4. Select Media5 from the **Phone Manufacturer.** The available manufacturers depend on the device types configured for the Enterprise.

Global Configuration File Settings
Display and change the global Clearspan settings for a selected Phone Manufacturer. After being saved, the change occurs at the next resync or reboot of the affected phones.
OK Cancel Apply
Enterprise: Moorehouse Moore Enterprises of Texas
Group: Relyks +
Phone Manufacturer: AudioCodes - MP-1xx
General Settings Extra Settings Dial Plan
Refresh Line Mode
Group Dial Plan
Dial Plan Settings: 🥪 Use Enterprise Setting
Digit Timeout: 4 seconds •
Enterprise Dial Plan
Dial Plan Settings: 😸 Use System Setting
Digit Timeout: 4 seconds v
Clear Copy Paste
System Dial Plan
Digit Timeout: 3 seconds x
[1-2pox(300000k][2-9p000000x][4-9p00018 [2-9p00000000k][8+1 #00(*)xx
AudioCodes Dial Plan
Enter a dial plan consisting of one or more digit patterns. When in Block Mode, the digit patterns must be separated by a I symbol, such as [01]DOXI01XDOXOXOXOXI/XX. When in Line Mode, each digit pattern is displayed on a separate line and the administrator only needs to enter the I symbol when entering more than one digit pattern on a line. Otherwise, OpEasy automatically adds the symbol between the digit patterns.
Use the following in the digit patterns:
Digit: Digit from 0 to 9.
Keypad Symbol: One of the keypad symbols *, #, or .
Wildcard: Symbol X matches any digit (0 to 9).

5. Click the Dial Plan tab. The Dial Plan page is displayed.

Figure 43: Global Configuration File Settings: Dial Plans Tab for AudioCodes

- 6. Click the Group Dial Plan, Enterprise Dial Plan or the System Dial Plan to modify the dial plans.
 - Use the **Clear** button to delete a dial plan.
 - Use the Copy and Paste buttons to copy an existing dial plan to another field.
 - Use the Line Mode and Block Mode buttons to toggle between the two format views.
 - Enter or change the **Digit Timeout** values as required. The Digit Timeout is the time that the phone waits between key presses before timing out and returning to the idle state.

If values are entered in multiple fields, Enterprise settings take precedence over System settings, Group settings take precedence over System and Enterprise settings, and phone template Extra Settings take precedence over all others.

 Dial Plan changes might also require changes to the configuration settings in the Phone Number Formatting phone application. Contact your system administrator. If modifications have been made, click OK. If no modifications have been made, or you want to cancel your changes, click Cancel.

Server Addresses

Viewing EMS Addresses

Each Phone Template is assigned an EMS Server address, which is used by the Soft Keys. You can view the EMS Server addresses that have been set up by your administrator.

1. From the main menu, select **Provisioning**, and then select **Phone Templates**.

 Click Server Addresses from the menu tree, or click Server Addresses from the Phone Templates menu. Then click EMS Server Addresses. The EMS Addresses page opens. The current EMS servers are displayed in the list.

EMS Addresses Display or change the list of EMS Server ad	dresses (host names / IP addresses). Each Phone Template	is assigned an EMS Server add			
OK Cancel Add					
Rebuild Status: Refresh System: None pending.					
	EMS Addresses				
EMS Address Name 🗇	EMS Address (Host Name / IP Address) 👙	Edit			
172.20.208.41	172.20.208.41	Edit			
20.20.20.3	20.20.20.3	Edit			
ems.tb20.net	ems.tb20.net	Edit			
EMS2	172.20.209.31	Edit			
EMS_2	172.20.209.31	Edit			
MartysTestEMS	10.70.10.121	Edit			
opeasyDevTest	10.70.10.121	Edit			
Polycom TB20RO	tb20ro.aastra.com	Edit			
tb20ems.cslab.mitel.com	tb20ems.cslab.mitel.com	Edit			
tb20ems.us.aastra.com	tb20ems.cslab.mitel.com	Edit			
tb20ems1	tb20ems1public.cslab.mitel.com	Edit			
tb20ems1public	tb20ems1public.cslab.mitel.com	Edit			
TB20ems2public - Public NIC	192,190,8,179	Edit			

Figure 44: Phone Templates Page - EMS Addresses

3. Click OK.

Viewing Conference Server Addresses

You can display the list of available Conference Server addresses (host names/IP addresses) that have been set up by your administrator.

- 1. From the main menu, select **Provisioning**, and then select **Phone Templates**.
- Click Server Addresses from the menu tree, or click Server Addresses from the Phone Templates menu. Then click Conference Server Addresses. The Conference Server Addresses page opens. The current Conference Servers are displayed in the list.

Conference Server Addre Display or change the list of available Conference server.	e Server addresses (host names / IP addresses). A Phone Template may select	a Conference Server
OK Cancel Add		
Rebuild Status: Refresh System	n: None pending.	
	Conference Server Addresses	
Conference Server Address Name 🕤	Conference Server Address (Host Name / IP Address)	Edit
Aastra - conference	conference	Edit
Aastra - conference@%BWHOST-1%	conference@%BWHOST-1%	Edit
Aastra - conference@direct.cslab.mitel.com	conference@direct.cslab.mitel.com	Edit
Aastra - conference@tb20ro.aastra.com	conference@tb20ro.aastra.com	Edit
AudioCodes Conference	conf	Edit
Conference ID	conference	Edit
Conference ID1	conference	Edit
Conference@%BWHOST-1%	conference@%BWHOST-1%	Edit
Polycom_Autotest	conference	Edit
Polycom_TB20RO	conference@tb20ro.aastra.com	Edit
standard	conference@%BWHOST-1%	Edit
TB20Direct-Polycom	conference@direct.cslab.mitel.com	Edit

Figure 45: Phone Templates Page – Conference Server Addresses

3. Click OK.

Phone Management

Phone Management allows you to view, add, modify, and restart phone devices. Phone Templates must already exist.

Third Party Phone Support

You can use OpEasy to configure certain Third Party phones when the 3rd Party system license for Clearspan is installed. Refer to the appendix of this guide for more information about using OpEasy to provision Third Party phones.

Viewing Phone Device Templates

To view existing Phone Templates:

- 1. From the main menu, select **Provisioning**, and then select **Phone Management**. The Phone Management page is displayed.
- 2. Select the Enterprise from the drop down list.
- 3. Select the **Group** from the drop-down list.
- 4. Select the **Device Level** from the drop-down lists to search for System, Enterprise or Group.
- 5. Click **Search** to view the full list of devices or enter the search parameters to filter the list. A list of phone devices is displayed.

If the Enterprise and Group are not selected, then one of the following criteria can be used to search for a device:

- Device Name
- Device Type using Equal To(Cannot be Contains or Starts with)
- MAC Address
- User ID
- User: Last Name
- User: First Name
- User: Phone Number
- User: Extension
- 6. Select a Phone device. Click the **View** button next to the Template column, in the row of the phone device for which you want to view the template. The Phone Management: Phone Template page is displayed.

Notes:

E/

- All the Aastra phones are now known as Mitel phones.
- · Group-level devices use Group-level Global Settings.
- Enterprise-level devices use Enterprise-level Global Settings.



Figure 46: Viewing Phone Template Details

Changing the Phone Template on a Device

1. From the main menu, select **Provisioning**, and then select **Phone Management**. The Phone Management page is displayed.

Phone Management Add a new phone device, import a list of phone devices (from a worksheet), or search for a list of phone devices to edit or delete.
OK Cancel Apply Add
Enterprise: Bulk Provisioning Lab Val, Inc - Group: Group_G Group, Gewel -
Device Levels: System, Enterprise, and Group
Device Search: Search
(All Devices) V Equal To V
Phone Restart
Select All Phones: Restart Selected Phones ThirdParty Phone Licenses (Enterprise): Restart Phones on Save: Used: 39 Available: Auto

Figure 47: Phone Management Page

- 2. Select the Enterprise and Group from the Enterprise drop-down lists.
- 3. Select the Device Levels.
- 4. Click **Search** to display all devices, or enter search parameters to filter your search. A list of phone devices is displayed.
- 5. Select the new template from the Template drop-down list on the row of the selected phone device, as shown in the following example.

-											
	phone device, import a list of phone	e devices (fro	m a workshe	et), or sea	rch for a list of pho	ne devices to edit or delete.					
ОК	Cancel Apply	Add									
	Enterprise: Bulk Provisionir Group: Group_G Gro										
	Device Levels: System, Enterp	rise, and Grou	ip 👻								
Devic	e Search: Search										
(All I	Devices) - Equal To -										
F	Phone Restart				ThirdParty Pho	ne Licenses (Enterprise):					
Select All Phones: Restart Selected Phones Used: 39											
	Restart Phones on Save: 📃				Available						
Di	splay Options										
	Template Information: 📝										
	Registration Status:										
						Pf	none Devices	•			
						(1-25 of 40)	14 <4 1	2 🕨 ы			
Selected	Device Name 💠	Device Level ≎	OpEasy Managed 3rd Party Phone \$	Support Device	MAC Address	Device Type 💠	Last 💠	First 💠	Phone Number ≎	Type 💠	Template 💠
	Aastra6731iDMS-9722221003	Enterprise			000012121003	Aastra 6731i (DMS)	LTest03	FTest03	972-222-1003	Primary	ENT-31i_DMS (Enterprise)
	Aastra6735iDMS-9722221004	Enterprise			000012121004	Aastra 6735i (DMS)	LTest04	FTest04	972-222-1004	Primary	31i_DMS_NameLabeling (Enterprise)
	Apetro6725iDM9 0722221122	Entorprico			000010101100	Apotro 6725i (DMQ)				Drimony	–ENT-31i_DMS (Enterprise)

Figure 48: Changing Template for a Phone Device

- 6. Check the Restart Phones on Save check box to restart the phone, if required.
- 7. Click OK or Apply.

Phone Devices Table:

The Phone Devices Table in the Phone Management page by default displays Phone Information, Assigned User and Phone Number. The Template Name and Description are also listed.

Phone Management Add a new phone device, import a list of phone devices (from a worksheet), or search for a list of phone devices to edit or delete.
OK Cancel Apply Add
Enterprise: Bulk Provisioning - Lab Val. Inc v Group_G - Group_G - Group_Gewel v
Device Levels: System, Enterprise, and Group
Device Search (All Devices) * Equal To *
Phone Restart Select All Phones: Restart Selected Phones Restart Phones on Save: Used: 39 Available: Auto
Display Options Template Information: Registration Status:
Dhone Davises

Figure 49: Display Selectiion

The Admin can view the Phone Information by unchecking the **Template Information** checkbox in the **Display Selection** section.

When the **Template Information** checkbox is unchecked, the Phone Devices table does not display the Template, View and Template Description columns.

When the **Registration Status** checkbox is checked, the System Level Registration (expires slowly) and User Agent Information (Model/Version) columns are displayed after the Device Type column.

Restarting Phone Devices

- 1. From the main menu, select **Provisioning**, and then select **Phone Management**. The Phone Management page is displayed.
- 2. Select the Enterprise and Group from the drop-down lists, if necessary.
- 3. Select the Device Levels.
- 4. Click **Search** to display all the devices or enter search parameters to filter the devices.
- 5. Restart Phone Devices by:
 - Select the Select All Phones checkbox to restart all the phones.
 - Select Restart Phones on Save to restart the selected phones when settings are saved.
 - Click **Restart Selected Phones** to restart only those phones where there is a check mark in the **Selected** column.

Phone Restart Select All Phones: Restart Phones on Save:	Restart Selected Phones	 Licenses (Enterprise): 39 Auto
Display Options Template Information: 🗹 Registration Status: 🗌		

Figure 50: Phone Restart and Display Selection Sections

Adding a Phone Device

You can add a phone, gateway, or communicator application device in Phone Management or under Users when adding or modifying a user. To add a device in Phone Management:

- 1. From the main menu, select **Provisioning** and then select **Phone Management**. The Phone Management page is displayed.
- 2. Click Add. The Phone Device Add page opens as shown in the following figure.



Note: If the Add button does not appear, then you are not authorized to add or delete devices.

Phone Device Add Add a new Clearspan phone device	
OK Cancel Custom Tags	
Enterprise: Mitel Labs Mitel Labs	
NOTE: This is an enterprise-level device. Enterprise-level devices DO NOT use Group-level Global Settings. Instead, they use Enterprise-level Global Settings.	
Phone Device	
Phote Levice Name:	
Device Level: Enterprise -	
Device Letter interprete interpret interprete interprete interprete interprete	
Template: (Select Template) *	
View Template	
Restart Phones on Save	
Device Description	
Description:	
Serial Number:	
Phone Location:	
Device Configuration	
Host Name / IP Address: Port: Port:	
Outbound Proxy:	
Stun Server:	
MAC Address:	
Device Protocot: SIP 2.0	

Figure 51: Phone Device Add Page

- 3. Enter the Device Name.
- 4. Select the Device Level and Device Type from the drop-down lists.
- Select the Template from the drop-down list. To view the template you selected, use the View Template button. Do not set Mitel, Polycom, Panasonic or Cisco phone templates to <None>.
 If an OpEasy template has not been created for those phone devices, set the value to <Default>.
- 6. In the Device Description section, enter a **Description** and **Serial Number** of the phone, both optional.
- 7. Enter the physical Phone Location.
- 8. The Device Configuration section includes the following:
 - Host Name/IP Address
 - Outbound Proxy
 - Stun Server
 - MAC Address

Z

Note: The MAC Address (Device's MAC Address or Auto Install Device ID) field is required to identify the device and is needed only when the device is assigned to a User.

- 9. The Transport Protocol is "Unspecified" by default.
- 10. Enter the ERL Record Name.
- 11. Enter the VLAN ID.

Warning: Modifying the VLAN ID may cause the phone to stop operating.

12. The Encryption (TLS/SRTP) field displays the encryption status of the device, None appears in the field for devices that do not support encryption.

Encryption Override can be used to override Encryption, Encryption Disabled or Encryption Disabled(Timed) or to turn the Override Off, Select None.



Note: An error is displayed when the number of ports exceeds the maximum number of encryption ports supported when the Encryption Settings is set to Required.

13. The DECT 112 Configuration table is displayed only for Mitel DECT-112 Devices. Enter the Handset IPEI Number and the Handset Registration Code in the DECT 112 Configuration table. If the Handset Registration Code is not entered, then the default code1539 is used.

Enter the repeater IPEI Numbers if repeaters have been enabled. The allowed values are alphanumeric characters with a maximum length of 10 characters.

- **14.** Click **Custom Tags** to configure the name and value of any custom tags for the device. Click **Add** or **Edit** on the Phone Custom Tags page to create or modify a custom tag.
- 15. Click OK*.

Phone Custom Tags Add
Add a custom tag for the device. *Pressing OK retains but does not save entered changes. To save the changes, press OK or Apply on a subsequent page.
Enterprise: Bulk Provisioning Lab Val, Inc Group: Group_G Group, Gewel
Device Name: Media5
Device Level: Group
Custom Tag
Tag Name: %
Tag Value:

Figure 52: Phone Custom Tags Add Page

16. Click **Custom Rings** to customize the ring selections for each line on the device. Enable Define Custom Ring Tones, and then change any Selected Ring from the default to another ring tone.

Phone Custom				
ustomize the ring setting to	or each	line on the phone. *Pressing OK does not save entered changes.	To save the changes, press OK or Apply on a subsequent page.	
OK*				
Enterprise:	Bulk I	Provisioning Lab Val, Inc		
Group:	Group	p_G Group, Gewel		
Device Name:	00_F	SH_Phone_67i		
Device Level:	Group)		
Phone Template:	Ent_6	7i_dms_w_Sidecar (Enterprise)		
Ring Customization:		efine Custom Ring Settings		
	() U	se Template Ring Settings		
		De	vice Ring Settings	
Clearspan Line Position	n 🗇	Line User Id 💠	Template Ring 💠	Selected Ring
1		9722221062@labval.mitel.com	Ring 14	Ring 14 👻
2			Ring 15	Default
3			Ring 2	Ring 1 Ring 2
4			Ring 3	Ring 3
5			Ring 4	Ring 4

Figure 53: Phone Custom Rings Page

17. Click OK*.

18. Click **Manage Users** to view the details of the phone template and configure how users are assigned to a phone device as described in Assigning, Removing, or Reordering Users on a Phone Device.

			lify: Manag		nplate. Assign, Ui	nassign, or Re-o	rder Users on	the phone device. *Pressing OK do	es not save entered changes. To save the
OK*	Cance	el							
	Enterp Gr		Ik Provisioning La oup_G Group, Ge						
Phone	Device								
	Device Na	me: 00	_FSH_Phone67i		Template Nam	ie: Ent_67i_dr	ns_w_Sideca	r	
	Device Le	evel: G	roup		Template Lev	el: Enterprise			
	Device T	ype: Aa	astra 6867i (DMS)	Te	mplate Descriptio	n: Enterprise	67i with ExpN	lodule	
User As	signment								
	Enterp	rise: Bi	ulk Provisioning La	ib Val, Inc					
	Gr	oup: G	roup_G Group, Ge	wel					
(All Use	rs) 🔻	Equal To	•				- +		
		S	earch for Users	Update the list of users in Se	elect User below.	(* indicates an A	ternate User	ID)	
	Selection T	vne:	Ordered by Neme (Last First) Ordered by	Dhono Numbor i	Extension	Ordered by	Liner ID	
20.04	Select U		Io Users Found	Last, First) 💿 Ordered by	Phone Number /	Extension	Ordered by	Userid	
		_							
Assigne	ed Users								
Line Position	First Button	Ring	Last Name	First Name	Department	Phone Number	Extension	User ID	Line/Port
1	Line 1	Ring 14	FSH_1062	Flexible Seating Guest		972-222-1062	1062	9722221062@labval.mitel.com	9722221062.primary@labval.mitel.com
2	TSK1	Ring 15	i						

Figure 54: Phone Management: Manage Users

19. Click **OK***.

20. Click OK again. The Phone Management page opens. The new device appears in the list.

Modifying a Phone Device

- 1. From the main menu, select **Provisioning** and then select **Phone Management**. The Phone Management page is displayed.
- 2. Select the Enterprise and Group from the drop-down lists, if necessary.
- 3. Select the Device Levels.
- 4. Click Search to display all devices, or enter search parameters to filter your search.

Phone Management Add a new phone device, import a list of phone devices (from a worksheet), or search for a list of phone devices to edit or delete.
OK Cancel Apply Add
Enterprise: India Mitel India Lab Group: BNG_3 Bengaluru 3 NAT-AC-Single
Device Levels: System and Enterprise
Device Search Device Name Contains
Phone Restart
Select All Phones: Restart Selected Phones ThirdParty Phone Licenses (Enterprise): Restart Phones on Save: Used: 80 Available: Auto
Display Options
Template Information: 🜌
Registration Status:

Figure 55: Phone Device Search Example

- 5. Modify Display Selection by:
 - Select the **Template Information** check box to include Phone Template information in the "Phone Devices" table.
 - Select the **Registration Status** check box to include the Registration Status information in the "Phone Devices" table.

Note:

- Group-level devices use Group-level Global Settings.
- Enterprise-level devices use Enterprise-level Global Settings.
- 6. Click on the **Edit** link at the end of the row, or click anywhere in the row of the phone device you want to edit. The **Phone Device Modify** page appears.
- 7. Click **OK** to confirm the changes made.
- 8. Click OK or Apply.

Deleting a Phone Device



Note: The Delete button is not available for assigned Devices.

- 1. From the main menu, select **Provisioning** and then select **Phone Management**. The Phone Management page is displayed.
- 2. Select the Enterprise and Group from the drop-down lists, if necessary.
- 3. Select the Device Levels.
- 4. Click Search to display all devices or enter search parameters to filter your search.

5. Select a device without a User assigned and click on the **Edit** link at the end of the row or click anywhere in the row of the phone device you want to delete. The **Phone Device Modify** page is displayed with a Delete button.

Phone Device Mo Modify an existing Clearspan phone	
OK Cancel	Apply Delete Manage Users Custom Tags Custom Rings Replace Phone
Enterprise:	India Mitel India Lab
Group:	BNG_3 Bengaluru 3 NAT-AC-Single
Phone Device	
Device Name:	Aastra6869iDMS-6073336069
Device Level:	Group
Device Type:	Aastra 6869i (DMS)
Mitel Support Device:	No
Template:	BNG_3_69i (Group) - 69i View Template Restart Phones on Save
Device Description	

Figure 56: Deleting a Phone Device

- 6. Click the **Delete** button. A confirmation box is displayed.
- 7. Click **Yes**. The Device is removed from the Phone Devices table.

Replacing a Phone Device

- 1. From the main menu, select **Provisioning** and then select **Phone Management**. The Phone Management page is displayed.
- 2. Select the Enterprise and Group from the drop-down lists, if necessary.
- 3. Select the Device Levels.
- 4. Click **Search** to display all devices, or enter search parameters to filter your search.

Phone Device Mod Modify an existing Clearspan phone	
OK Cancel	Apply Delete Custom Tags Replace Phone
Enterprise:	Bulk Provisioning Lab Val, Inc
Group:	Group_G - Group, Gewel
Phone Device	
Device Name:	00Source
Device Level:	Group
Device Type:	Marty Music On Hold
Support Device:	No
Template:	<userdefined> •</userdefined>

Figure 57: Replace Phone

- 5. Click on the Edit link at the end of the row, or click anywhere in the row of the phone device you want to edit or delete. The Phone Device Modify page appears.
- 6. Click **Replace Phone** to replace an existing phone with a new phone with the same model and functionality. The Replace Phone button takes you to the Replace Phone page.
- 7. Enter the MAC Address of the device or enter the Auto Install ID of the device.
- 8. For Polycom Phones, enter the Device Access User Name, Password and Confirm Password.

- 9. Click OK*
- 10. Click OK or Apply to save the changes.

Assigning, Removing, or Reordering Users on a Phone Device

- 1. From the main menu, select **Provisioning** and then select **Phone Management**. The Phone Management page is dispalyed.
- 2. Select the Enterprise and Group from the drop-down lists.
- 3. Select the Device Levels.
- 4. Click **Search** to display all devices, or enter search parameters to filter your search. A list of phone devices configured for this group appears.
- 5. Click on the **Edit** link at the end of the row, or click anywhere in the row of the phone device you want to edit. The **Phone Device Modify** page appears.

													Cancel App	OK
Group: Group, Group, Group, Group, Group and G														
Device Search: Search Phone Restart ThirdParty Phone Loanses (Enterprise): Select All Phones: Restart Selected Phones Restart Phones on Save: Used::::::::::::::::::::::::::::::::::::													· · · · · · · · · · · · · · · · · · ·	
Phone Restart Restart Selected Phones ThidParty Phone Loenses (Enterprise): Use: 30 Available: Auto Display Options ThidParty Phone Loenses (Enterprise): Use: 30 Available: Auto Display Options ThidParty Phone Loenses (Enterprise): Use: 30 Available: Auto Display Options Template Information: If Registration Status: Phone Devices (1-25 of 210) Selected Device Name o Device Type o Last o First o Number o Type Template o											Group 💌	nterprise, and (Device Levels: System, En	
Phone Restart Select All Phones Restart Selected Phones Use: 39 Available: Auto Display Options Template Information: Registration Status: Phone Devices (1-25 of 210) Phone Devices (1-25 of 210) Phone Devices														
Select All Phones: Restart Selected Phones: Use::::::::::::::::::::::::::::::::::::							- +						Devices) - Equal To -	(AIII
Select All Phones on Save Restart Phones on Save Used: 30 Available: Auto Display Options Template Information: Registration Status Phone Devices (1-25 of 210) = 12 3 4 5 6 7 8 9 so et (1-25 of 210) = 12 3 4 5 6 7 8 9 so et Selected Device Name o Device Name o Device Selected Device Name o Device Type o Last o First o Phone Type Template o 													Phone Restart	F
Restart Phones on Save: Used: 39 Available: Auto Display Options Template Information: Registration Status:	ThirdParty Phone Licenses (Entermise):													
Available: Auto	Used: 39													
Template Information: Registration Status: Phone Devices (1-25 of 210) ■ Phone Devices Phone Devices Type Template 0								able: Auto	Availa				Nestarch nones on save.	
Template Information: Registration Status: Phone Devices (1-25 of 210) ■ Phone Devices Phone Devices Type Template 0														
Phone Devices Phone Devices (1-25 of 210) I 2 3 4 5 6 7 8 9 mm Selected Device Name o Device Managero Device Name o Lastic First o Phone Devices I 2 3 4 5 6 7 8 9 mm I 2 3 4 5 6 7 8 9 mm I 2 3 4 5 6 7 8 9 mm I 2 3 4 5 6 7 8 9 mm I 2 3 4 5 6 7 8 9 mm I 2 3 4 5 6 7 8 9 mm I 2 3 4 5 6 7 8 9 mm I 2 3 4 5 6 7 8 9 mm I 2 3 4 5 6 7 8 9 mm														Di
Phone Devices (1-25 of 210) I I I I I I I I I I I I I I I I I I I														
(1-25 of 210) I 2 3 4 5 6 7 8 9 set Selected Device Name o Device MAC Address Device Type o Last o First o Phone Type o													Registration Status:	
(1-25 of 210) I 2 3 4 5 6 7 8 9 set Selected Device Name o Device MAC Address Device Type o Last o First o Phone Type o						Devices	Phone							
Selected Device Name OPEasy Device Managed Device Name OPEasy Device Type Managed Device Type Device				4	9 🔊			(1-25 of 210)						
Phone o V			Template 🔉			First o	Last 👌	Device Type 👌	MAC Address	Support Device	OpEasy Managed 3rd Party Phone ©	Device Level 👌	Device Name 👌	Selected
00_FSH_Phone_67i Group 000002222000 Aastra 8887(DMS) FSH_1082 Flexible Seating Guest 972-222-1082 Primary Ent_67t_dms_w_Sidecar (Enterprise) View	Template Description 👌 Ed				072 222 1082	Elevible Seation Guest	ESH 1082	Aastra 6867i (DMS)	000002222009			Group	00_FSH_Phone67i	
00Source Group Marty Music On Hold Primary CliserDefined>	Template Description $_{\odot}$ Ed Enterprise 87i with ExpModule Ed		Ent_67i_dms_w_Sidecar (Enterprise +	Primary	012-222-1002									
Offest CSTIDIER Group Clearagen Tablet Listr2 FFest2 972222-1072 SCA Tablet Group Week		View			072-222-1002			1 1				Group	00Source	

Figure 58: Selecting a Phone Device to Edit

6. On the Phone Device Modify page, click Manage Users.

Phone Device Mo Modify an existing Clearspan phot									
OK Cancel	Apply Manage Users Custom Tags Custom Rings Replace Phone								
Enterprise:	Bulk Provisioning Lab Val, Inc								
Group:	Group_G Group, Gewel								
Phone Device									
Device Name:	00_FSH_Phone67i								
Device Level:	Group Aastra 68671 (DMS)								
Device Type:									
Support Device:	No								
Template:	Ent_87i_dms_vv_Sidecar (Enterprise) Enterprise 87i with ExpModule +								

Figure 59: Phone Device Modify: Manage Users Button

7. The Phone Device Modify: Manage Users page opens, enabling you to add new users, remove users, replace users, or reorder users as described in the following sections.

Assigning New Users to a Phone Device

Follow these steps to add a user to a phone device using Phone Management:

- 1. On the Manage Users page, Click **Search for Users** to view all available users. You can use search criteria to filter the list of users in the drop-down.
- 2. Select the user you want to add from the Select User drop-down menu. You can choose to list users Ordered by Name, Ordered by Phone Number/Extension, or Ordered by User ID.

	odify: Manage Users phone device and details of the associated phone	e template. Assign, Unass	sign, or Re-or	der Users or	the phone device. *Pressing OK			
OK* Cancel								
	Bulk Provisioning Lab Val, Inc Group_G Group, Gewel							
Phone Device								
	00_FSH_Phone67i	Template Name:	Ent 67i dn	1s w Sideca	ır			
Device Level:		Template Level:						
Device Type:	Aastra 6867i (DMS)	Template Description:	1.1	87i with ExpN	Nodule			
User Assignment								
Enterprise:	Bulk Provisioning Lab Val, Inc							
Group:	Group_G Group, Gewel							
(All Users) 🔹 Equ	al To 👻				+			
Selection Type:	Search for Users Update the list of users in Select User below. (* indicates an Alternate User ID) Selection Type: Ordered by Name (Last, First) Ordered by Phone Number / Extension Ordered by User ID							
Select User:	Select by Name - Last, First)		_					
	Select by Name - Last, First)							
	Available Users:			_				
Assigned Users	 Dog, Blackout 972-222-1130 9722221 Dog, Gewel 972-222-1123 972222112 							
	Dog, Gracie 972-222-1124 972222112							
Position Button	Dog, Poppy 972-222-1126 972222112 Dog, Viva 972-222-1132 9722221132	@cslab.mitel.com		Extension	User ID			
1 Line 1 Rin	g Dog, Whobert 972-222-1128 9722221			1062	9722221082@labval.mitel.com			
2 TSK1 Rin	LTest01, FTest01 972-222-1001 97222	21001@labval.mitel.com						

Figure 60: Manage Users: Select User

- 3. Configure the settings for the assignment
 - SCA Device:
 - Select SCA Device from the Endpoint Type drop-down list. If the Endpoint Type selection is grayed out, then it cannot be changed.
 - The line/Port is filled.
 - Enable or Disable the Shared Call Appearance, the SCA are enabled by default.
 - Select Allow Calls to Originated and Allow Calls to this Destination check boxes, both are checked by default.
 - Click the Show SCA Options button to change any of the following options for this SCA:
 - Alert All Shared Appearances for Click-to-Dial calls
 - Allow Call Retrieve from another location
 - Allow Multiple Concurrent Calls on the same shared line
 - Allow Bridging of Users on the same shared line

|--|

- Bridge Warning Tone for Barge-in

Note: Changing User SCA Options affects all of this user's SCA assignments, not just this one.

User Assignment							
Enterprise:	TestTest Shivu's Enterprise						
Group:	A_Group Group A						
(All Users) 🔻 Equa	al To 🔪						
	Search for Users Update the list of users in Select User below. (* indicates an Alternate User ID)						
Selection Type:	Ordered by Name (Last, First) Ordered by Phone Number / Extension Ordered by User ID						
Select User:	Bailly, Eric 705-222-1050 7052221050@cctesting.aastra.com						
User Last Name: User Phone Number: User ID: Endpoint Type: * Line / Port: Shared Call Appearance:	Bailly User First Name: Eric 705-222-1050 User Extension: 1050 7052221050@cctesting aastra.com User Department: SCA Device • 7052221050 sca01 @ cctesting aastra.com Enabled • ✓ Allow Calls to be Originated ✓ Allow Calls to this Destination						
User SCA Options	(These settings affect all SCAs for this User.)						
Aler	ting: 🧧 Alert All Shared Appearances for Click-to-Dial calls						
Call Retri	ve: 🔲 Allow Call Retrieve from another location						
Multiple Call Arrangem	nent: Mallow Multiple Concurrent Calls on the same shared line						
Bridging							
_							

Figure 61: Manage Users: New User Assignment

- Choose to Insert the user or Replace another user with this one.
- Choose the Line Position for the new user.
- Click Add User.

User Assignment								
Enterprise:	TestTest Shivu's Enterprise							
Group:	A_Group Group A							
(All Users) 👻 Equa								
ĺ	Search for Users Update the list of users in Select User below. (* indicates an Alternate User ID)							
Selection Type:	Ordered by Name (Last, First) Ordered by Phone Number / Extension Ordered by User ID Ordered by User I							
Select User:	Messi, Lionel 705-222-1023 7052221023@cctesting.aastra.com 👻							
User Last Name:	Messi User First Name: Lionel							
User Phone Number:	705-222-1023 User Extension: 1023							
User ID:	7052221023@cctesting.aastra.com User Department: A1_Department							
Endpoint Type:	SCA Device 👻							
* Line / Port:	7052221023.sca01 @ cctesting.aastra.com v							
Shared Call Appearance:	Enabled							
chared our appearance.	Allow Calls to be Originated							
	Allow Calls to this Destination Hide User SCA Options							
	Allow Calls to this Desunation							
User SCA Options	(These settings affect all SCAs for this User.)							
Alert	ing: 🔲 Alert Ali Shared Appearances for Click-to-Dial calls							
Call Retrie	eve: 📃 Allow Call Retrieve from another location							
Multiple Call Arrangem	ent: 🐱 Allow Multiple Concurrent Calls on the same shared line							
Bridging								
Bri	dging: 🔲 Allow Bridging of Users on the same shared line							
Bridge Warning	Bridge Warning Tone: None 👻							
	Insert V Line Position 2 V Add User							
	insert							
Accimed Licere	Replace							

Figure 62: Manage Users: Line Position

For Primary Device:

- Select Primary Device from the Endpoint Type drop-down list. If the Endpoint Type selection is grayed out, then it cannot be changed.
- The Line/Port is filled.
- Choose to Insert the user or Replace another user with this one.
- Choose the Line Position for the new user.
- Click Add User.

The Assigned Users table is updated, and the display shows the assignments.

Assigned Users										
Line First Position Button	Ring	Last Name	First Name	Department	Phone Number	Extension	User ID	Line/Port	Туре	Enab
1 Line 1	Ring 14	FSH_1082	Flexible Seating Guest		972-222-1082	1062	9722221062@labval.mitel.com	9722221082.primary@labval.mitel	com Priman	,
2 TSK1	Ring 15	1011_1002	Thexible Dealing Obest		012-222-1002	1002	er zzzz rooz@iabeal.intel.com	or zzzz rooz.prinary@iaova.inite	com rimary	'
		Telephone Lin	TSK1 TSK2 TSK3 TSK3 TSK4 TSK5 TSK1 Presence Goodbye Goodbye Hold Options Nute Volume Volume Volume Volume Volume				Alexandration Alexandration alexandration Alexan	Directory Navigation Keys Transfer Conference Redial Line 1 Speaker/Headsu	xtension F	
		2	1		ng Guest FSH_10		FSH_1062, Flexible Seating		1062 Ri	
				Elevible Section Quest ESH 1082 / 1082			EQH 1082 Elevible Section	- Guest 072 222 4082	1082	A 4 1

Figure 63: Manage Users: Assigned User

4. To change user assignment settings after adding a user, choose **Edit User Assignment** from the **Action** drop-down on that user's row in the Assigned Users table.

Assign	ed Users											
Line Position	First Button	Ring	Last Name	First Name	Department	Phone Number	Extension	User ID	Line/Port	Туре	Enabled	Action
1	Line 1	Ring 14	FSH_1082	Flexible Seating Guest		972-222-1082	1062	9722221062@labval.mitel.com	9722221062.primary@labval.mitel.com	Primary		(Change User) 🔹
2	TSK1	Ring 15										(Change User)
												Edit User Assignm
												Remove User

Figure 64: Assigned User - Edit User Assignment

5. When you are done making changes, select **Save Edit** or **Cancel Edit**.

Save E	dit	Cancel Edi	t									
Assigne	ed Users											
Line Position	First Button	Ring	Last Name	First Name	Department	Phone Number	Extension	User ID	Line/Port	Туре	Enabled	Action
1	Line 1	Ring 14	FSH_1062	Flexible Seating Guest		972-222-1062	1062	9722221062@labval.mitel.com	9722221062.primary@labval.mitel.com	Primary		(End Edit)
2	TSK1	Ring 15										(End Edit)
												Save Edit Cancel Edit)

Figure 65: Assigned User - Save Edit

6. Click OK*. Click OK again.

Removing or Reordering Users on a Phone Device

Follow these steps to remove or reorder users (SCA and Primary Device Users) on a phone device using Phone Management:

1. On the Manage Users page, in the Assigned user table use the **Action** drop-down menu at the end of a user's row to remove or move that user.

			/: Manage U evice and details of the		mplate. Assign, Ur	assign, or Re-ord	er Users on ti	te phone device. "Pressing OK does t	not save entered changes. To save the cl	hanges,	press OK	or Apply on a subsequent pa
OK*	Cancel]										
			rovisioning Lab Val, I _Pronto Pronto's Gro									
Phone D	evice											
De	evice Name:		evice_UsingTheTempla	ate	Template Nam	e: Ent_67i_dms						
D	evice Level:	Group			Template Leve	el: Enterprise						
[Device Type:	Aastra	6867i (DMS)	Te	emplate Description	n: Enterprise 67	7i					
User Assig	nment											
	Enterprise:	Bulk P	rovisioning Lab Val, I	Inc								
	Group: Group.Pronto - Pronto's Group											
(All Users)	- Equ	al To 👻					- +					
		Searc	h for Users Update	e the list of users in S	elect User below (* indicates an Alte	amate User IF	0				
	ection Type:		lered by Name (Last, F sers Found 🚽	First) Ordered by	y Phone Number /	Extension 0	Ordered by Us	ser ID				
	Select User		sers Found									
Assigned	Users											
Line Position	First Button	Ring	Last Name	First Name	Department	Phone Number	Extension	User ID	Line/Port	Туре	Enabled	Action
1	Line 1	Ring 14	Tester002	Test002		312-448-5502	5502	3124485502@labval.mitel.com	3124485502.sca01@labval.mitel.com	SCA	Enabled	(Change User) 🚽
2	TSK1	Ring 15										(Change User)
											- 6	Edit User Assignment

Figure 66: Manage Users

- 2. The Assigned Users table is updated as per the selection:
 - Edit User Assignment
 - Remove User Removes the user
 - Move to Position X Reorders the users
 - Move to Position Y Reorders the users

	Assigned	Users											
Р	Line	First Button	Ring	Last Name	First Name	Department	Phone Number	Extension	User ID	Line/Port	Туре	Enabled	Action
	1	Line 1	Default	LTest04	FTest04	Dept_1	9722221004	1004	9722221004@labval.mitel.com	9722221004.primary@labval.mitel.com	Primary		(Change User) 🔹
	2	Line 3	Default										

Figure 67: Assigned Users

3. Click OK*. Click OK again.

User Profiles

The User Profile is a set of rules applied at the time of user creation. Having this set of rules simplifies the user creation process because it allows certain user fields to be derived based on the rules. User Profiles must be created before adding Users. User Profiles can be exported and imported using Group Import and Group Export.



Note: In order to allow administrators to quickly set up users with Polycom or Panasonic phones, one or more User Profiles should be created for each type of Polycom and Panasonic phone that will be used. For more information, refer to the appendixes of this guide.

Adding a User Profile

Many of the parameters on this page are set to default values and may not need to be changed.

- 1. From the main menu, select Provisioning.
- 2. Click User Profiles from the menu tree, or click User Profiles from the Provisioning page menu.
- 3. Select the Enterprise and Group from the drop-down lists.
- 4. Click Add. The User Profile Add page opens, as shown in the following example.

User Profile Add										
Enter the configuration rules need	eded to create a n	ew Clearspan user.								
OK Cancel	Apply									
Enterorise:	Bulk Provisionin	n Lah Val Inc								
		-								
Group:	Group_G Gro	ip, Gewel								
User Profile										
* User Profile Name:										
Description:										
User Type:	Normal 💌									
New User Notification:		I Message to New User								
	Send E-ma	I Message to OpEasy Administrator								
	Send E-mail Message to Phone Procurement:									
	* E-mail.	Address:								
Primary Phone Device										
Device Type:	(Select Device	Type) 🔹								
Device Level:	Group 👻									
Template:										
in the second se										
	View Phone									
Service Packs										
	Select all Servic	e Packs required by the User:								
	Select	Service Pack								
		All Services								
		Authentication Only								
		Basic Trunk								
		BasicUser								
		BLF Only								
		Business Trunk								
		Hoteling								
		SP1								

Figure 68: User Profile Add Page - Top

- 5. Enter the User Profile Name.
- 6. Enter a Description for the user profile.
- 7. Select the User Type. The options are Normal and Voice Mail Only.
- **8.** Choose the E-mail notifications that you want sent when a new user is created that uses this profile. E-mail notifications are supported only for Mitel, Panasonic, and Polycom phones.
- **9.** Select the **Device Type** from the drop-down list. Note that if a selection of "Trunk User" is made, the screen refreshes with different fields. See section *Creating a Trunk User Profile* for more information.
- 10. Select the Device Level and Template from the drop-down list.
- 11. Click View Phone Configuration button to confirm this device and template are correct.
- 12. Check one or more of the **Service Packs** required by the user. A Service Pack is a grouping of one or more Clearspan services and is created on Clearspan. In this section, all Service Packs available to this Enterprise and Group will be listed. You should know the content of the Service Pack before assigning it to the profile.
- 13. User Defined Fields These fields are displayed only if the Enterprise User Fields are defined at the Enterprise level. To change the default value of the User Defined Fields, clear the Use Default check box and enter the value of the User Defined Field in the Value box.
- **14.** Select the **User Domain** from the drop-down list in the **User Information** section. The drop-down list contains all domains assigned to this Enterprise and Group.
- **15.** Select the **User Billing Type**. The **User Billing Type** drop-down box appears only if the Billing User Types are defined in the System Settings (Only SU administrators are allowed to configure System Settings).

Configuration Rules	
Site ID:	(Required to create Extension-only users)
User ID:	(First Name).(Last Name)@labval.mitel.com
User Password:	Initialize to random password
Phone Number:	New Phone Number Activation: O Activate O Deactivate 💿 Do Not Change
	Network Server Site: DFLT_SITE Default Site
	Selection Method: None (Manually selected by Admin)
Extension:	Auto Generate Extension from Phone Number: 💿 Yes 💿 No
	Use Prefix Digits Plus the Last 4 Digits of the phone number
Class of Service:	Specify the Class of Service: (Group Default)
Voice Mail:	No Voice Mail
Music On Hold Profile:	(None) -
Calling Line ID:	Last Name: User's Last Name
Ganing Eine ib.	First Name: User's First Name
	Phone Number: User's Phone Number
Authentication:	Name: User ID (without Domain)
	Password: Generate Random Password
	Confirm Password:
Line/Port:	(Phone Number / Extension) @ labval.mitel.com 👻
MAC Address:	(Device's MAC Address or Auto Install Device ID)
	Last 4 Digits of Phone Number + Unique ID (+ 2-Digit SCA Number)
Device Access:	User Name: Phone Number (or Extension + Unique ID) Group-Unique ID: 0002
	Password: Generate 4-Digit Random Password
	Confirm Password:
Desktop/Mobile/Tablet:	Desktop (Create device for the user)
	Type: CS Engage Desktop Communicator Desktop Skype for Business (S4B)
	Line/Port: (Phone Number / Extension) @ labval.mitel.com
	Template: (Select Template)
	Mobile (Create device for the user)
	Type: 🕘 CS Engage Mobile 🛑 Clearspan Mobile 🛑 Communicator Mobile
	Line/Port: (Phone Number / Extension) @ labval.mitel.com
	Template: (Select Template)
	Tablet (Create device for the user)
	Type: CS Engage Tablet Clearspan Tablet Communicator Tablet
	Line/Port: (Phone Number / Extension) @ labval.mitel.com
	Template: (Select Template) 👻

Figure 69: User Profile Add Page – Bottom

- **16.** Enter the **Site ID**, if necessary. The Site ID is appended to an extension number for provisioning of *extension-only users*. This is useful when a Clearspan User ID is to be the user's phone number. The Site ID is appended to make the User ID unique.
- **17.** Select the format for the **User ID** from the drop-down list. The options include, FirstNameLastName, PhoneNumber, or the User's E-mail Address.
- **18.** Select the **User Password** check box to initialize the password to a randomly generated value; leaving the box unchecked requires the administrator to enter a password.
- 19. Click one of the following for New Phone Number Activation: Activate (Recommended) if the phones will place and receive calls from outside the system, or Deactivate if the calls will be internal only.
- **20.** Change the **Network Server Site** if you want to use a site other than the one shown. This setting applies when a user is assigned a phone number.

- 21. Choose a Selection Method. None (Manually selected by Admin), Extension Only, or Preselect Phone Number from Range. When Preselect Phone Number from Range is selected, Available Phone Number Ranges appear so that you can add them to Selected Phone Number Ranges.
- **22.** Choose **Yes** for **Auto Generate Extension** to have OpEasy automatically generate an extension for the user based on the User Profile rules.

You can enter prefix digits and select from a drop-down list the number of digits to be used from the phone number to form the extension. For example, you could specify the prefix digits of '44' and select '3 digits' from the drop-down list. This would result in an extension being generated that starts with '44' and ends with the last 3 digits of the assigned phone number. If the user is assigned the phone number 214-555-1234 an extension of 44234 would be assigned to the user.

- **23.** Choose a **Class of Service** from the drop-down list. The list shows all Classes of Services associated with the Enterprise and Group and also allows selection of the Group default.
- 24. Select a Voice Mail from the drop-down list. The following is available when voice mail is allowed:
 - No Voice Mail.
 - No E-mail Notification The user's phone will notify of a voice mail, but no notification will be sent to the user's e-mail.
 - E-mail Notification In addition to the user's phone notification, notification will also be sent to the user's e-mail.
 - E-mail Delivery In addition to the user's phone notification, an e-mail will be sent to the user and the voice message will be included as an attachment.
 - Selectable, with Default: No Voice Mail
 - Selectable, with Default: Voice Mail No E-mail Notification
 - Selectable, with Default: Voice Mail E-mail Notification
 - Selectable, with Default: Voice Mail E-mail Delivery



CAUTION: E-mail copies of Voice Mail might not be sent over secure E-mail.

The first four options in the drop-down list do not allow administrators to choose any other voice mail type when creating a user with a Basic Import spreadsheet. However, the last four options, labeled 'Selectable', provide a default setting that can be overridden when creating a user with a Basic Import spreadsheet. The Advanced Import spreadsheet does not have these 'Selectable' options, because you can always select any Voice Mail setting when using an Advanced Import, regardless of the User Profile Voice Mail setting.

- **25.** If the Voice Mail selection is other than No Voice Mail, the Group Mail Server fields are presented. Enter the **E-mail Address** for that server.
- **26.** Choose a **Music On Hold Profile** if that service is assigned and you want to specify those settings for this user profile.
- 27. Specify the information that will appear for Calling Line ID.

The options are to provide the user's last name, first name, and phone number, or to specify something different using the text boxes to the right of each field.

Specifying something other than user's name and phone number is useful if, for example, this User Profile will be used for members of a technical support group. It may be more appropriate to show, "Technical Support" and the support center number rather than the user's personal information. Before making a selection, however, it is important to note that the phone number field will be used for 911 purposes in some cases:

- If the OpEasy Emergency Gateway application IS in use, the Calling Line ID: Phone Number field will NOT be used for 911. In this case, the ERL Record Name field will be used for 911 purposes for user location.
- If the OpEasy Emergency Gateway application is NOT in use, the Calling Line ID: Phone Number field WILL be used for 911. When the Calling Line ID: Phone Number field is used for 911, the OpEasy Administrator must know the phone numbers that have been provisioned for 911 and must provide the correct phone number for each user.

For example, assuming the OpEasy Emergency Gateway application is not in use:

If a single phone number (that is, 469.365.3000) has been provisioned for 911 for an entire building, then the OpEasy Administrator must specify that single phone number (4693653000) as the Calling Line ID: Phone Number for each Clearspan user at this location.

If the DIDs associated with each user's phone number at a specific location have been provisioned for 911, then the OpEasy Administrator can specify the user's phone number as the Calling Line ID: Phone Number (the default setting).



Note: On Clearspan, the Call Processing Policies can be set at the Enterprise, Group and User levels. For each level, the default is to "Use configurable CLID for Calling Line Identity" as circled in the following illustration. To make use of the settings configured in User Profile for Calling Line ID, the "Use configurable CLID for Calling Line Identity" settings must be maintained on Clearspan.

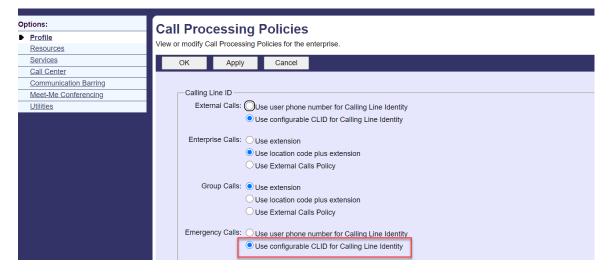


Figure 70: Clearspan Call Processing Policies Page

28. Choose the rules for creation of the Authentication Name, enter the Password and Confirm Password if you choose Specify the Authentication Password. The Name can be the User ID or a unique ID generated by OpEasy. The Password can be generated randomly by OpEasy if the Generate Random Password is chosen, or it can be specified in the text box to the right.

Valid Authentication Password characters are a-z, A-Z, 0-9, blank, or special characters: - _ . , ! \$ % & * + / = ? ^ { } { } | ~ @.

- **29.** Choose the domain to use for a user's **Phone Line/Port**. Select the domain from the drop-down list.
- 30. Choose the method for creation of the MAC Address for Mitel phone or AudioCodes Auto Install. The options are last 4 digits of the phone number, last 5 digits of the phone number, phone number, or extension. Each option has a Unique ID (2-Digit SCA Number) added.

The MAC Address here is not a real MAC Address but is instead an Auto Install Device ID. The information entered here is used later in the Auto Install of a Mitel phone or AudioCodes device to select this Clearspan device. After the Auto Install process is complete, the MAC Address field changes to the real MAC address.

- 31. For Device Access, choose the method for determining User Name, generate the password, or enter Password and Confirm Password if you choose Specify the Device Access Password. This field is only used by Polycom and Panasonic phones.
- **32.** If a User also requires a Desktop, Mobile or a Tablet device, check one or more of the check boxes in the **Desktop/Mobile/Tablet** section.
 - Select the device type required for each device option. CS Engage is recommended, the others are available for backward compatibility.
 - Set the Line/Port domain and device Template to be used for each device type.
- 33. Click OK or Apply.

Editing a User Profile

- 1. From the main menu, select Provisioning.
- 2. Click User Profiles from the menu tree, or click User Profiles from the Provisioning page menu.
- 3. Select the Enterprise and Group from the drop-down lists.
- 4. Click Search to display all profiles, or enter search parameters to filter your search.
- 5. Click the **Edit** link on the end of the row of the profile to modify. The User Profile Modify page opens. You can modify the profile using the procedures in section *Adding a User Profile*. The only field that you cannot change is the User Profile Name field.
- 6. Click OK or Apply. Note that editing a User Profile does not affect any users that were previously built using this profile.

Copying a User Profile

You can copy a User Profile to another enterprise/group or copy to the same enterprise/group. The template associated with the copied profile can be copied as well.

After the profile is copied, the new profile is edited on a new page to allow you to make any desired changes. The new profile will not be saved until it is edited.

- 1. From the main menu, select Provisioning.
- 2. Click User Profiles from the menu tree, or click User Profiles from the Provisioning page menu.

- 3. Select the Enterprise and Group from the drop-down lists.
- 4. Click Search to display all profiles, or enter search parameters to filter your search.
- 5. Click the **Copy** link on the end of the row of the profile to copy. The User Profile Copy page opens, as shown in the following example.

User Profile Co Copy an existing User Profile.	
OK Cancel	
Enterprise:	Bulk Provisioning Lab Val, Inc
Group:	Group_G Group, Gewel
Copied User Profile	
Enterprise:	Bulk Provisioning Lab Val, Inc
Group:	Group_G Group, Gewel
User Profile Name:	00TestUserProfile
Description:	abcd!\$%&* +/?^{}~@_123
New User Profile	
Enterprise:	Bulk Provisioning Lab Val, Inc
Group:	Group_G Group, Gewel
* User Profile Name:	00TestUserProfile
Description:	abcd!\$%&* +/?^{}~@_123
Copy Options:	Replace Existing User Profile
NOTE: The copied Use	Profile will only be saved after editing. You may cancel the copy by pressing the Cancel button on this page or on the

Figure 71: User Profile Copy Page

- 6. Select the target **Enterprise** and the target **Group** from the drop-down lists. In this case, the target group is in the same enterprise. If you choose another group, the Copy Options change.
- 7. Enter the name for the new profile in the User Profile Name text box.
- 8. Enter a **Description** in the Description text box.
- **9.** Select **Replace Existing User Profile** if you want to overwrite an existing template of the same name.
- **10.** If you chose a different group to copy this user profile to, you can configure the following:
 - Check Copy Template to copy the template that is associated with the original group to the new group.
 - Enter the Template Name and Description of the template.
- **11.** Click **OK.** After you have copied a user profile, the User Profile Copy Modify page opens, enabling you to modify the new copy.
- **12.** Modify any of the settings in the new profile. You can modify the profile using the procedures in section *Adding a User Profile*.
- 13. Click OK. The User Profiles page opens, with the new profile appearing in the list.

Creating a Trunk User Profile

To create Trunk Users more quickly, you can create a User Profile specifically for Trunk Users that specifies the Trunk Group, Trunk Line/Port, and Enterprise Trunk settings.

- 1. From the main menu, select **Provisioning**.
- 2. Click User Profiles from the menu tree, or click User Profiles from the Provisioning page menu.
- 3. Select the Enterprise and Group from the drop-down lists.
- 4. Click Add.

Configuration Rules						
Site ID:	(Required to create Extension-only users)					
User ID:	(First Name).(Last Name)@labval.mitel.com 🚽 Migration Trunk User: 🗌 (Adds ".tu" before "@")					
User Password:	Initialize to random password					
Phone Number:	New Phone Number Activation: O Activate O Deactivate O Not Change					
	Network Server Site: DFLT_SITE Default Site					
	Selection Method: None (Manually selected by Admin)					
Extension:	Auto Generate Extension from Phone Number: Yes No 					
	Use Prefix Digits Plus the Last 4 Digits of the phone number					
Class of Service:	Specify the Class of Service: (Group Default)					
Voice Mail:	No Voice Mail					
Music On Hold Profile:	(None) -					
Calling Line ID:						
	First Name: User's First Name					
	Phone Number: User's Phone Number					
Authentication:	Name: User ID (without Domain)					
	Password: Generate Random Password					
	Confirm Password:					
Trunk Group:	None (Manually entered by Admin)					
Line/Port:	None (Manually entered by Admin) (Phone Number / Extension) @ labval.mitel.com					
Line/Port: Enterprise Trunk:	None (Manually entered by Admin) (Phone Number / Extension) @ [labval.mitel.com] None (Manually entered by Admin)					
Line/Port:	None (Manually entered by Admin) (Phone Number / Extension) @ [labval.mitel.com • None (Manually entered by Admin) • User Name: Phone Number (or Extension + Unique ID) • Enterprise-Unique ID: 1212					
Line/Port: Enterprise Trunk:	None (Manually entered by Admin) (Phone Number / Extension) @ [labval.mitel.com] None (Manually entered by Admin)					
Line/Port: Enterprise Trunk:	None (Manually entered by Admin) (Phone Number / Extension) @ [labval.mitel.com • None (Manually entered by Admin) • User Name: Phone Number (or Extension + Unique ID) • Enterprise-Unique ID: 1212					
Line/Port: Enterprise Trunk:	None (Manually entered by Admin) • (Phone Number / Extension) @ [abval.mitel.com • None (Manually entered by Admin) • User Name: Phone Number (or Extension + Unique ID) • Enterprise-Unique ID: 1212 Password: Generate 4-Digit Random Password • Confirm Password: Desktop (Create device for the user)					
Line/Port: Enterprise Trunk: Device Access:	None (Manually entered by Admin) • (Phone Number / Extension) @ [labval.mitel.com • None (Manually entered by Admin) • User Name: Phone Number (or Extension + Unique ID) • Password: Generate 4-Digit Random Password • Confirm Password:					
Line/Port: Enterprise Trunk: Device Access:	None (Manually entered by Admin) • (Phone Number / Extension) @ [abval.mitel.com • None (Manually entered by Admin) • User Name: Phone Number (or Extension + Unique ID) • Enterprise-Unique ID: 1212 Password: Generate 4-Digit Random Password • Confirm Password: Desktop (Create device for the user)					
Line/Port: Enterprise Trunk: Device Access:	None (Manually entered by Admin) • (Phone Number / Extension) @ [labval.mitel.com • None (Manually entered by Admin) • User Name: Phone Number (or Extension + Unique ID) • Enterprise-Unique ID: 1212 Password: Confirm Password • Desktop (Create device for the user) Type: CS Engage Desktop Communicator Desktop					
Line/Port: Enterprise Trunk: Device Access:	None (Manually entered by Admin) • (Phone Number / Extension) @ [abval.mitel.com • None (Manually entered by Admin) • User Name: Phone Number (or Extension + Unique ID) • Enterprise-Unique ID: 1212 Password: Confirm Password • Desktop (Create device for the user) Type: CS Engage Desktop • Communicator Desktop • Skype for Business (S4B) Line/Port: (Phone Number / Extension) @ [abval.mitel.com •					
Line/Port: Enterprise Trunk: Device Access:	None (Manually entered by Admin) • (Phone Number / Extension) @ [abval.mitel.com • None (Manually entered by Admin) • User Name: Phone Number (or Extension + Unique ID) • Enterprise-Unique ID: 1212 Password: Confirm Password • Desktop (Create device for the user) Type: CS Engage Desktop • Communicator Desktop • Line/Port: (Phone Number / Extension) @ [abval.mitel.com • Template: [Select Template] •					
Line/Port: Enterprise Trunk: Device Access:	None (Manually entered by Admin) • (Phone Number / Extension) @ [abval.mitel.com • None (Manually entered by Admin) • User Name: Phone Number (or Extension + Unique ID) • Enterprise-Unique ID: 1212 Password: Generate 4-Digit Random Password • Confirm Password: Confirm Password: Desktop (Create device for the user) Type: CS Engage Desktop • Communicator Desktop • Skype for Business (S4B) Line/Port: (Phone Number / Extension) @ [abval.mitel.com • Template: (Select Template) • Mobile (Create device for the user)					
Line/Port: Enterprise Trunk: Device Access:	None (Manually entered by Admin) • (Phone Number / Extension) @ [abval.mitel.com • None (Manually entered by Admin) • User Name: Phone Number (or Extension + Unique ID) • Enterprise-Unique ID: 1212 Password: Generate 4-Digit Random Password • Confirm Password: Confirm Password: Desktop (Create device for the user) Type: CS Engage Desktop • Communicator Desktop • Skype for Business (S4B) Line/Port: (Phone Number / Extension) @ [abval.mitel.com • Template: (Select Template) • Mobile (Create device for the user) Type: CS Engage Mobile • Clearspan Mobile • Communicator Mobile					
Line/Port: Enterprise Trunk: Device Access:	None (Manually entered by Admin) • (Phone Number / Extension) @ [abval.mitel.com • None (Manually entered by Admin) • User Name: Phone Number (or Extension + Unique ID) • Enterprise-Unique ID: 1212 Password: Generate 4-Digit Random Password • Enterprise-Unique ID: 1212 Password: Confirm Password: Confirm Password: Desktop (Create device for the user) Type: CS Engage Desktop • Communicator Desktop • Skype for Business (S4B) Line/Port: (Phone Number / Extension) @ [abval.mitel.com • Template: (Select Template) • Mobile (Create device for the user) Type: CS Engage Mobile • Clearspan Mobile • Communicator Mobile Line/Port: (Phone Number / Extension) @ [abval.mitel.com •					

Figure 72: Trunk User Profile Settings

5. Under the Primary Phone Device section, select **Trunk User** as the **Device Type**. When the Device Type is set to Trunk User, the User Profile page refreshes and the following occurs:

6. The Template field and View Phone Configuration button are grayed out under the Primary Phone Device section.

In the Configuration Rules section, the Line/Port field for the phone is removed. The Trunk Group/Enterprise Trunk fields are added and if a Trunk Group selection is made, the Line/Port field for the trunk is presented.

- 7. Select a **Trunk Group** for this user. Or, if this user will belong to multiple Trunk Groups, choose the appropriate **Enterprise Trunk**. The Line/Port applies when the Trunk Group selection is made.
- 8. Click OK.

Users

See the *Clearspan OpEasy Basic Provisioning Guide* for more information about creating a User as a Department Administrator, or an administrator with more limited privileges.

User Licenses

The main Users page displays the number of OpEasy User Licenses that are used and available. Administrators can, if needed, set the User or Third Party licensing for an enterprise to Auto, so that licenses do not have to be set and maintained manually. For more information, refer to Configuring License Allocations.

Adding or Editing a User

The "User", "Optional", and "Phones" tabs are populated before adding user features.

- 1. From the main menu, select **Provisioning** and then **Users**. The Users page opens.
- 2. Select the Enterprise and Group from the drop-down lists, if necessary. You can use search criteria to filter the list, or you can click Search or enter Search parameters to view the full list.

You can select (**All Enterprises**) in the Enterprise drop-box with (**All Groups**) automatically selected, and click **Search** to view Users in all the Enterprises and Groups. The User Search criteria for All Enterprises and All groups must include one or more of the following search criteria, in addition to any othe search criteria:

- User ID / Alternate User ID
- Last Name
- First Name
- Phone Number (Primary) or Phone Number (Alternate)
- Extension

L				Group. To add a n I Settings button.	ew user, press	the Add button.	To display a list of users to edit or de	elete, press t	he Search	button. To display or modify General User set	tings, or E-ma	ail n
L	ОК	Ca	ncel	Add	General Setting	IS						
		Enterpris Grou		Provisioning Lab roups) 👻	Val, Inc 👻							
	User Lice User Se	enses (Ente		Used: 100 Available: Auto iearch								
L							- +	1				
L	(All US	ers) 💌	Equal To	•								
L							Users					
l						(1-25 of 10	3) 📧 🔜 🕇 2 3 4 5	>	25 ~	/		
	Last Name ≎	First Name ≎	Group 💠	Department 💠	Phone Number ≎	Extension 💠	User ID ≎	OpEasy Managed User 🗇	Support User ≎	Device Name 💠	Device Level 💠	E
L	ArjunVoice	Varada	Group_G		<u>9722221018</u>	1018	9722221018@labval.mitel.com	false	false	Aastra6869iDMS-9722221018	Group	E
	LTest01	FTest01	Group_G	Dept_1 (Group)	<u>9722221001</u>	1001	9722221001@labval.mitel.com	true	false	Aastra53iDMS-9722221001	Group	E

Figure 73: Users Page

An "OpEasy Managed User" consumes an OpEasy User License. OpEasy displays Clearspan users without a license, but in order for an administrator to add, modify, or change a Clearspan user using OpEasy, an OpEasy User License is required.

3. Support Users are created by the support administrator team for testing and troubleshooting only. Click Edit in the search results for the user you want to modify, or click Add to add a new user, then the Advanced: User Add page opens. The Advanced: User Modify page opens if you click edit, as shown in the following figure. If no license is available, an error appears.



Note: If the Add button does not appear, then you are not authorized to add or delete users.

Advanced: User Modify Modify an existing Clearspan user.
OK Cancel Apply Delete
Enterprise: clearspanlab Clearspan LAB Group: sales organization Sales Organization User: Sales, User1 (6063338901@clearspanlab.com) Service: (Select Service)
User Optional Phones Announcements
(Close Other User Classification
User Profile: (Select User Profile)
NOTE: Selected User Profile only applies to configuration changes, such as adding a device, to pre-fill fields according to User Profile configuration rules.
Clearspan User
* Last Name: Sales * First Name: User1
E-mail Address:
✓ Use Organization ID
Account ID:
User Billing Type: Default: (USER)
Department:
Phone Number: 606-333-8901
Extension: 8901
Network Server Site: DFLT_SITE Default Site -
Voice Mail No Voice Mail Delete Voice Mailbox Reset Voice Mailbox
Reset Voice Portal Passcode: (create a numeric passcode of 4 to 8 digits)
Confirm Portal Passcode:
Reset User Password: (create a password of at least 6 characters)
Confirm User Password:
Initialize User Password to random password

Figure 74: Advanced: User Modify Page, User Tab

Users Tab

- **1.** Select a **User Profile** from under the User Classification section drop-down list if needed. Choosing a User Profile pre-populates certain fields.
- 2. Click View Template if you want to view the phone template assigned to the User Profile.
- 3. Enter the user's Last Name and First Name under the Clearspan User section.
- 4. Enter the E-mail Address for the user.

- Use Organization ID of the User, or uncheck the Use Organization ID checkbox and enter the Account ID of the User. This option is enabled only for Enterprise Administrators, System Administrators and Solution Resellers.
- 6. Select the User Billing Type. The User Billing Type drop-down box appears only if the User Billing Types are defined in the System Settings (Only SU administrators are allowed to configure System Settings).

Clearspan User		
* Last Name:	Sales	* First Name: User1
E-mail Address:		
	Use Organization ID	
Account ID:		
User Billing Type:	Default: (USER)	
Department:		
Phone Number:	606-333-8901 👻	Activated OpeActivated
Extension:	8901	

Figure 75: Advanced: User Billing Type

- 7. Select the Department from the drop-down list.
- 8. Select the **Phone Number** from the drop-down list. The **Extension** field fills in automatically if a User Profile has been selected.
- **9.** Activated or Deactivated indicates the current status of the phone number selected. Change this setting if necessary. Select Activated (Recommended) if the phone will place and receive calls from outside the system, or Deactivated if the calls will be internal only.
- **10.** Change the **Network Server Site** if you want to use a site other than the one shown. This setting applies when a user is assigned a phone number.
- 11. You can click View Phone Template to view the template for the primary phone.
- 12. Enter the Phone Location (Optional data for E911 Emergency services).
- 13. If the user is associated with an AudioCodes MediaPack device, you can enter a User ERL Record Name to assign a unique ERL for the user in the Emergency Gateway. If the User ERL Record Name field is blank, the ERL Record Name for the AudioCodes device is assigned to the user in the Emergency Gateway.
- 14. Select the Voice Mail type from the drop-down list if you choose to override the default. If Voice Mail was previously enabled and saved, Delete Voice Mailbox and Reset Voice Mailbox buttons appear. Delete Voice Mailbox removes the voice mail account and any associated greetings without deleting the user. Reset Voice Mailbox deletes and rebuilds the voice mail account and deletes any associated greetings to restore the Voice Mail Greetings settings to defaults.
- **15.** Enter the **Voice Portal Passcode and Confirm Portal Passcode**. It is typically 4-8 digits in length, to be determined by the administrator. Valid characters are 0-9.
- 16. Enter the User Password and Confirm User Password. It can include any characters and is typically at least 6 characters in length, to be determined by the administrator. You can click Initialize User Password to random password to auto generate a password. This randomly generated password is lengthy and complicated, which protects the user from unauthorized access in cases where the password will not be used. If the user will use the password to access the web portal, this random password would not be required.

The remaining parameters on this page can be hidden using the Hide Details button, or displayed using the Show Details button. If a User Profile is used, the fields in lower section are filled in automatically as you edit the upper section of the page. Click Refresh if you want to update the fields on the bottom of the page to reflect changes made on the top of the page.

If you are not using a User Profile to create the user or you need to override an entry generated by the User Profile, then review and modify the settings in this section:

- New User Notification–Mitel, Panasonic, and Polycom phones only
- · Site ID-required if an extension-only user
- Clearspan User ID-required
- · Support User-checked if this user is for Support Administrator and is excluded from billing
- Calling Line ID information–last name and first name are required
- · Service Packs selection-click on the Service Pack(s) on the left and click Add
- User Defined Fields These fields are displayed only if the Enterprise User Fields are defined at the Enterprise level. To change the default value of the User Defined Fields, clear the Use Default check box and enter the value of the User Defined Field in the Value box.

User Defined Fields			
For each User Defined Field, either choose to use the Default value or enter a value for this	iser:		
Field Name	Туре	Use Default	Value
AutoTestFieldName_BOOLEAN	Boolean	V	True
AutoTestFieldName_EMPTY_STRING	String		
AutoTestFieldName_INT	Number		431234
AutoTestFieldName_STRING	String		String
AutoTestFieldNameEA_BOOLEAN	Boolean		True
AutoTestFieldNameSA_BOOLEAN	Boolean		True
AutoTestFieldNameSR_BOOLEAN	Boolean		True
boolean field-shivu	String		asdas

Figure 76: User Defined Fields

Authentication Name, Password and Confirm Password–required if this user is assigned a
device that uses authentication, the password is to be determined by the administrator. You
can click Initialize Authentication Password to random password to auto generate a
password. This randomly generated password is lengthy and complicated, which protects
the user from unauthorized access in cases where the password will not be used. The
generated password has 40 characters, and includes uppercase, lowercase, numeric,
and special characters.



Note: For information about configuring Device Access credentials for Polycom phones, refer to the appendix of this guide.

Optional Tab

Click the **Optional** tab of the User Add page to view or change optional values such as Contact Information, Time Zone, Language information, and Aliases used to place and receive calls. User Information values are pre-populated but can be changed if additional options are available in the drop-down menus.

You can enter up to four Alternate User IDs, which can be used to sign on to the Clearspan system. When searching for users or devices by User ID, matching Alternate User IDs are included in the results.

Advanced: User A Select a User Profile and complete	the user information to add a new Clearspan user.
OK Cancel	
Enterprise: Group: User: Service:	clearspanlab Clearspan LAB sales organization Sales Organization
Gervice.	
User Optional Phones A	nnouncements
User Information	(Close C
Class of Service:	None
Time Zone:	(Group Default) •
Language:	English •
Alternate User IDs	
Alternate User ID 1:	
Description:	
Alternate User ID 2:	
Description:	
Alternate User ID 3:	
Description:	
Alternate User ID 4:	
Description:	
User Aliases	
Aliases:	sip: @ Clearspanlab.com -
	sip: @ Clearspanlab.com +
	sip: @ clearspanlab.com -
User Contact Title:	
Mobile:	
Pager:	
Address Location:	

Figure 77: Advanced: User Add Page – Optional Tab

Phones Tab

Click the Phones tab of the User Add page to view or change the Phone Configuration and Shared Call Appearances, and view the primary phone template, as shown in the following figure. (The Restart Selected Phones button is not available when creating a phone. It is only available when modifying a phone.)

- Edit-Takes you to the User: Primary Phone Device Modify page.
- View Template–Takes you to the User: Phone Template page.
- Add Shared Call Appearance–Takes you to the User: Shared Call Appearance (SCA) Add page.
- SCA Options (Shared Call Appearance) Takes you to the SCA Options tab.
- View–Takes you to the User: Phone Template page.

When no User Profile is selected, the User Add Phones tab provides the options to Add Primary Phone or Assign Primary Trunk as shown in the following figure. For more information about Trunk Users, refer to section *Creating a Trunk User*.

Advanced: User Add
Select a User Profile and complete the user information to add a new Clearspan user.
OK Cancel
Enterprise: clearspanlab – Clearspan LAB
Group: sales organization Sales Organization
User:
Service: (Select Service) -
User Optional Phones Announcements
(Clos
Phone Devices
Primary Phone: Add Primary Phone or Assign Primary Trunk
Shared Call Appearance: Add Shared Call Appearance (add a line for this user on another phone)
SCA Options

Figure 78: Advanced: Alternate User Add Phones Tab

- Add Primary Phone–Takes you to the User: Primary Phone Device Add page.
- Assign Primary Trunk-Takes you to the User: Primary Trunk Assign page.

Editing the Primary Phone Device for a User

The Phones tab provides the ability to change the primary phone device for a user using the Edit button.

- 1. From the main menu, select **Provisioning** and then **Users**. The Users page opens.
- 2. Select the Enterprise and Group from the drop-down list, if necessary.
- 3. Click Search to display all devices, or enter search parameters to filter your search.
- 4. Click the **Edit** link at the end of the user's row or click anywhere in the row of the phone device you want to edit.
- 5. Click the **Phones** tab on the Advanced: User Modify page.
- 6. Click the Edit button on the Phones tab. The User: Primary Phone Device Modify page opens.
 - The Unassign Device button removes the phone device from this user without deleting it. The Delete Device button deletes this phone device from the Clearspan system. The Delete Device button does not appear if the phone device is used as a primary device by any other user.
 - The **Custom Tags** button takes you to the Primary Phone Device Custom Tags page where you can configure the name and value of any custom tags for the device.
 - The Custom Rings button takes you to the Primary Phone Device Custom Ring Tones page where you can customize the ring selections for each line on the device.
 - The Replace Phone button takes you to the Replace Phone page to replace an existing phone with a new phone with the same model and functionality. Enter the MAC Address of the device or enter the Auto Install ID of the device. Enter the Device Access User Name, Password and Confirm Password for Polycom Phones.



Note: The **Replace Phone** option is not applicable to Clearspan Communicator devices.

Replace Phone Prepare the database to allow repl OK* Cancel	acing the physical phone device with another identical device.
Enterprise:	Moorehouse – Moore Enterprises of Texas
	Aastra6869iDMS- <u>4765552009</u>
Device Level:	
Phone Installation Informati * MAC Address:	000000002009 (Enter New Device's MAC Address or an Auto Install Device ID)

Figure 79: User: Replace Phone

 Select New Phone Device from the Phone Device drop-down list to create a new phone device. Select Search Phone Devices to search for a specific device or set of devices. After you click Search, the Phone Device List shows a list of devices that match the search criteria.



Note: If the New Phone Device selection does not appear, then you are not authorized to add or delete devices.

8. Enter the Line/Port information. The field is pre-populated, but you should verify the information. It can be characters or numbers but must be unique. The recommended format is:

<Phone Number/Extension>.<Line Definition>.<Customized Field>@<Line/Port Domain>

The following are examples of the Line/Port user portion (before the @):

Extension Only

Single or primary SCA line:

3000.primary.site345

Secondary SCA lines:

- 3000.sca01.site345, 3000.sca02desktop.site345, 3000.sca03mobile.site345
- Phone Number

Single or primary SCA line:

- North American Number: 4693653000.primary.site345 or 4693653000.primary
- E.164 Number: -72884000.primary.site345 or -72884000.primary

Secondary SCA lines:

- North American Number: 4693653000.sca01.site345 or 4693653000.sca01
- North American Number: 4693653000.sca02desktop.site345 or 4693653000.sca02desktop
- North American Number: 4693653000.sca03mobile.site345 or 4693653000.sca03mobile
- 9. Select a Line Position if more than one user is assigned to this device.
- 10. If the user is associated with an AudioCodes MediaPack device, you can enter a User ERL Record Name to assign a unique ERL for the user in the Emergency Gateway. If the User ERL Record Name field is blank, the ERL Record Name for the AudioCodes device is assigned to the user in the Emergency Gateway.

11. The **Encryption (TLS/SRTP)** field displays the encryption status of the device, **Unsupported** appears in the field for devices that do not support encryption.

Encryption (TLS/SRTP) setting of the phone is specified by the template or global settings. If **Encryption Override** has been temporarily enabled, you can disable it.

The Phone Device Users table shows the users assigned to this phone device.

User: Primary Pho Modify the primary phone device of	the user. *Pressing OK	lodify Unassign, or Delete r	etains but does not sav	ve entered changes. To	save the changes, pres	s OK or Apply on the subsequent page.
OK* Cancel	Unassign Device*	Delete Device*	Manage Users	Custom Tags	Custom Rings	Replace Phone
Group:	Moorehouse Moore I Relyks Johnson, Sheron (sher		use.com)			
Phone Device						
Phone Device:	Aastra6869iDMS-476	5552009 (Group) 👻				
* Device Level:	Group					
Device Type:	Aastra 6869i (DMS)					
Template:	Content of the second secon	-				
User Line						
* Line / Port:	4765552009.primary		@ moorehouse.co	m 💌		
Line Position:	1st Phone Line					
Hide Details						
Device Description						
Description:						
Serial Number:						_
Phone Location:	5850 Granite Pky					
Device Configuration						
Host Name / IP Address:					Port:	

Figure 80: User: Primary Phone Device Modify Page

12. Click **Show Details** and change values for any of the remaining fields as described in the following illustration.

Hide Details	5								
Device Descript	tion								
De	escription:								
Seria	al Number:								
Phone	e Location:	5850 Granite	Pky						
Device Configura	ation								
Host Name / IF	P Address:					Port:			
Outbou	und Proxy:								
Stu	un Server:								
* MAC	C Address:	000000020	09 (Device's I	MAC Address or Auto Inst	all Device ID)				
Device	e Protocol:	SIP 2.0							
Transport	t Protocol:	Unspecified	-						
	VLAN ID:		(VLAN is not enabled in	the template)					
				ay cause the phone to sto	p operating				
ERL Reco				-,	, ,,				
		L]						
Encryption (TL		None							
	nes/Ports:								
Assigned Lin									
Unassigned Lin	nes/Ports:	23							
				P	hone Device Users				
Last Name 💠	First Nam	ie 💠	Department 💠	Phone Number 💠	Extension 💠		Line / Port 💠	Type 💠	Position 💠
Johnson	Sheron			476-555-2009	2009 - End of Users -	sheron.johnson@moo	4765552009.primary@	Primary	1
					- End of Users -				

Figure 81: Device Description and Configuration

Enter the MAC Address (Device's MAC Address or Auto Install Device ID). This field is required to identify the device.

The **DECT 112 Configuration** table is displayed only for Mitel DECT devices. Enter the **HandSet IPEI Number** and the **HandSet Registration Code** for the Mitel DECT device. At least one **Handset IPEI number** and **HandSet Registration Code** information is required to be entered, else an error is thrown.

CT 112 Configuration		
Handset	Handset IPEI Number	Handset Registration Code
1	111111111	1111
2	222222222	2222
3	333333333	3333
4		
5		
6		
7		
8		
9		
10		
	- End of DECT 112 Handse	ts -

Figure 82: User: DECT 112 Configuration Table

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Note: The default Mitel DECT-112 HandSet Registration code is 9351 when Hotel Mode (Phone Lock) is enabled in the Template or Global Settings. The HandSet Registration Code column will not be displayed in the DECT 112 Configuration Table.

13. Click OK.



Note: For information about configuring Device Access credentials for Polycom phones, refer to the appendix of this guide.

Adding a Shared Call Appearance (SCA)

A Shared Call Appearance (SCA) can be added on the Phones tab while you are adding or modifying a user. The SCA is the user's number assigned to another phone. SCAs can be useful for executive/assistant situations or anytime you want another user answering this user's phone. Additionally, inbound and outbound calls can be completed on this SCA number.

- 1. From the main menu, select **Provisioning** and then **Users**. The Users page opens.
- 2. Select the Enterprise and Group from the drop-down list, if necessary.
- 3. Click **Search** to display all the users or enter search parameters to filter your search.
- 4. Click the **Edit** link at the end of the user's row or click anywhere in the row of the phone device you want to edit.
- 5. Click the **Phones** tab on the Advanced: User Modify page.
- 6. Select Add Shared Call Appearance. The User: Shared Call Appearance (SCA) Add page opens.
- 7. Select the **Phone Device** where this number will be placed from the Phone Device drop-down list. When assigning a device to an SCA, **Search Phone Devices** is the default selection. Select criteria for a specific device or set of devices. After you click **Search**, the **Phone Device List** shows a list of devices that match the search criteria.

User: Shared Call Assign the user as a line on an ad	Appearance (SCA) Add ditional phone device. *Pressing OK retains but does not save entered changes. To save the changes, press OK or Apply on the subsequent page.
OK* Cancel	
	India – Mitel India Lab BNG_2 – Bengaluru 2 NAT-AC-HA ademo, btry (6063335186@bengaluru2.cslab.mitel.com)
Phone Device	
Phone Device:	(Search Phone Devices) 👻
Phone Device Search:	Search
(All Devices) -	iontains:
Phone Device List:	(Select Phone Device)
Filone Device List.	(Select Phone Device)
Template:	65i (Group) 6863i (Group)
	6863i-6063335043 (Group) 6867i (Group)
Useding	6667+603335083 (Group)
User Line * Line / Port:	6869i-6063335074 (Group)
	6873i-6063335014 (Group) 6930i-6063335115 (Group)
Line Position:	6940F-60335114 (Group) 6940F-60335114 (Group)
Shared Call Appearance:	Aastra6863iDMS-6063335175 (Group)
	Aastra6865iDMS-6063335039 (Group) Aastra6865iDMS-6063335070 (Group)
	Aastra866bIMs-660335491 (Group)
	Aastra6865iDINS-6063335598 (Group)
	Aastra6867iDMS-6063335041 (Group)
Device Configuration	Aastra6867iDMS-6063335075 (Group) Aastra6867iDMS-6063335108 (Group)
Host Name / IP Address:	Aastradeon/DIMS-6063335224 (Group) Port:
Outbound Proxy:	Aastra6867iDMS-6063335549 (Group)
Stun Server:	Aastra6869/DMS-6063335012 (Group)
MAC Address:	Aastra6869IDMS-6063335054 (Group) Aastra6869IDMS-6063335079 (Group)

Figure 83: User: SCA Add Page – Phone Device List

8. The **Template** is automatically filled in from the existing information. However, you can change it to a template that will accommodate the SCA.

User: Shared Call Appearance (SCA) Add Assign the user as a line on an additional phone device. *Pressing OK retains but does not save entered changes. To save the changes, press OK or Apply on the subsequent page.
OK* Cancel
Enterprise: clearspanlab Clearspan LAB Group: sales organization Sales Organization User: test, test1 (test1.test@clearspanlab.com)
Phone Device
Phone Device: (Search Phone Devices)
Phone Device Search
Phone Number Contains: 8924
Phone Device List: (No Phone Devices Found)
Template: (Select Template) -
View Template
User Line
* Line / Port: 6063338924.sca01.1234 @ clearspanlab.com -
Line Position: 1st Phone Line
Shared Call Appearance: Enabled
Allow Calls to be Originated
Allow Calls to this Destination

Figure 84: User: Shared Call Appearance (SCA) Add Page

- To view the template for this phone device, click View Template. To change user assignments on this phone device, click Manage Users and make changes as described in Assigning, Removing, or Reordering Users on a Phone Device.
- 10. Check Restart Phones on Save.
- 11. Enter the Line/Port number. In this example, it is 4765552014.sca01, the number of the line that is going onto this phone as an SCA. This recommended naming convention keeps track of the SCA numbers on a particular phone. If you create another SCA on this phone, it would be "Phone Number +.sca02".
- **12.** Choose **Line Position** from the drop-down list to indicate the position of this Shared Call Appearance on the device selected.
- **13.** The **Allow Calls to be Originated** and the **Allow Calls to this Destination** fields are checked by default. Make adjustments if you do not want calls to originate from or terminate on this SCA line.
- 14. Click OK*. The entry is not yet saved.
- **15.** Click the **SCA Options** button on the Phones tab if you want to change any of the following options that apply to all SCAs:
 - Alert All Shared Appearances for Click-to-Dial calls
 - Allow Call Retrieve from another location
 - Allow Multiple Concurrent Calls on the same shared line
 - Bridging

er Add mplete the user information to add a new Clearspan user.
rprise: clearspanlab Clearspan LAB Group: sales organization Sales Organization User: test; test1 (test1.test@clearspanlab.com) ervice: (Select Service) -
SCA Options Announcements
(Close T
lerting: 🧧 Alert All Shared Appearances for Click-to-Dial calls
erting: Alert All Shared Appearances for Click-to-Dial calls ertireve: Allow Call Retrieve from another location
trieve: 📝 Allow Call Retrieve from another location

Figure 85: Advanced: User Modify Page – SCA Options Tab

- 16. Select Allow Bridging of Users on the same shared line, if required.
- **17.** Choose a **Bridge Warning Tone for Barge-in** option from the drop-down list. The tone can be played one time at Barge-in, or can be repeated every 30 seconds.
- 18. Click OK or Apply.

Adding or Replacing a New Phone Device for Shared Call Appearance

- 1. Select the device or the All Devices option from the **Phone Device Search** section, and click **Search**.
- 2. Select the phone device from the **Phone Device List**, select the template or use the default template, click **OK**. The Advanced: User Modify page opens.
- 3. Click Edit in the Phone Devices Table, the User: Primary Phone Device Modify page opens.
- 4. Click **Replace Phone** to replace an existing phone with a new phone with the same model and functionality. The **Replace Phone** button takes you to the Replace Phone page.
- 5. Enter the MAC Address of the device or enter the Auto Install ID of the device. Enter the **Device** Access User Name, Password and Confirm Password for Polycom Phones.

Removing a Shared Call Appearance

- 1. From the main menu, select **Provisioning** and then **Users**. The Users page opens.
- 2. Select the Enterprise and Group from the drop-down list, if necessary.
- 3. Click **Search** to display all the users or enter search parameters to filter your search.
- 4. Click the **Edit** link at the end of the user's row or click anywhere in the row of the phone device you want to edit..
- 5. Click the **Phones** tab on the Advanced: User Modify page.
- 6. Click the Edit link in the row of the SCA to remove, in the list at the bottom of the page.

Advance Modify an existing	d: User Modi g Clearspan user.	fy									
ОК	Cancel App	ly Delete]								
	Group: sales User: Sales,	oanlab Clearspan L organization Sales User3 (6063338903(ct Service)	Organization								
User Option	nal Phones Annound	ements									
									(Close Other Ta	bs)	
Phone	Devices										
		ect112-6063338903									
Phone Level: Group Edit View Template Shared Call Appearance: Add Shared Call Appearance (add a line for this user on another phone) SCA Options											
Phone	Restart										
s	elect All Phones: 📃	Restart Selected	Phones								
Restart I	Phones on Save: 📃										
					Phone Devices						
Restart Select	Device Name 💠	Device Level 💠	MAC Address 💠	Device Type 💠	Line / Port 💠	Type 💠	Disabled 💠	Template 💠			Edit
	MitelDect112-60633389	03 Group	006063338903	Mitel DECT 112 (DMS)	6063338903.primary@clearspanlab.com	Primary	false	Mitel-DECT112 (Group)		View	Edit
	Mitel Dect	Group		Mitel DECT 6XX (DMS)	6063338903.sca01@clearspanlab.com	SCA	false				Edit
	- End of Phone Devices -										

Figure 86: Advanced: User Modify Page – SCA to Remove

- **7.** Select the **Phone Device** of the SCA from the drop-down list on the User: Shared Call Appearance (SCA) Modify page.
- 8. Click the Unassign button.

Modify the assignment of the user OK* Cancel Enterprise: Group:	Appearance (SCA) Modify as a line on a phone device. *Pressing OK, Unassign, or Delete retains but does not save entered changes. To save the changes, press OK or Apply on the subsequent page. Unassign Device* Delete Device* Manage Users Custom Tags Replace Phone clearspanlab – Clearspan LAB sales organization – Sales Organization Sales, User3 (6063338903@clearspanlab.com)
Phone Device Phone Device * Device Level: Device Type:	Mitel Dect (Group) Group Mitel DECT 6XX (DMS) Restart Phones on Save
User Line * Line / Port: Line Position: Shared Call Appearance:	6063338903.sca01 @ clearspaniab.com • 1st Phone Line Enabled • Ø Allow Calls to be Originated Ø Allow Calls to this Destination
Show Details Device Configuration	

Figure 87: Unassign a Shared Call Appearance from a Phone Device

- 9. Click OK in the Unassign confirmation dialog box. The Shared Call Appearance is removed.
- 10. Click OK or Apply.
- **11.** The **Custom Tags** button takes you to the Shared Call Appearance (SCA) Custom Tags page where you can configure the name and value of any custom tags for the device.
- **12.** The **Custom Rings** button takes you to the Shared Call Appearance (SCA) Custom Ring Tones page where you can customize the ring selections for each line on the device.

Creating a Trunk User

You can create a Trunk User within a Clearspan Trunk Group, to provide SIP-based network services to legacy phone equipment. To create Trunk Users more quickly, you can create a User Profile that specifies the Trunk Group, Line/Port, and Enterprise Trunk settings.

- 1. From the main menu, select **Provisioning** and then **Users**. The Users page opens.
- 2. Select the **Enterprise** and **Group** from the drop-down list, if necessary. You can create a Trunk User by either adding the user to a Trunk Group or assigning the user to an Enterprise Trunk.

3. Click Add.

2

Note: If the Add button does not appear, then you are not authorized to add or delete users.

- 4. Click the **Phones** tab on the Advanced: User Add page.
- 5. Select Assign Primary Trunk for the Primary Phone. The User: Primary Trunk Assign page opens.

User: Primary Tru Assign a trunk as the primary phore	nk Assign e for the user. *Pressing OK retains but does not save entered changes. To save the changes, press OK or Apply on the subsequent page.
OK* Cancel	
Enterprise: Group: User:	clearspanlab Clearspan LAB sales organization Sales Organization Sales, User4 (6063338905@clearspanlab.com)
Primary Trunk Trunk Group:	SalesOrganization-TrunkGroup +
Line / Port: Alternate Trunk Identity: Enterprise Trunk:	6063338905 @ clearspaniab.com • Test_Enterprise_Trunk •

Figure 88: User: Primary Trunk Assign Page

- 6. Set the Trunk Group to the Clearspan Trunk Group for the user.
- 7. Enter the Line/Port when a Trunk Group is selected.
- 8. Enter an **Alternate Trunk Identity**, if required. This field is used to present alternative routing information to the destination. For example, if the user is behind an existing PBX, this field may be used to properly route the trunk to the current PBX destination.
- 9. Enter a SIP Contact (Trunk contact) when the Identity/Device Profile Type is "Static Registration capable."
- **10.** Choose an **Enterprise Trunk** when the Trunk User will use more than one Trunk Group.
- **11.** Click **OK**. The Users page opens.
- 12. Click OK again.

Announcements Tab

OpEasy allows you to upload, delete, or configure audio or video announcement files to repositories. Announcements repositories are kept for Users, Auto Attendant and Hunt Group virtual users, and Groups. Once an announcement is saved to a repository, OpEasy allows you to assign it to Voice Mail Greetings, Auto Attendant menus, and Music On Hold. You can search, upload, rename, or delete announcements on a user's Announcements tab. You can also view announcement types, size, and usage. You can manage announcements when you create a new user or when modifying a user, as follows:

- 1. From the main menu, select **Provisioning** and then **Users**. The Users page opens.
- 2. Select the Enterprise and Group from the drop-down list, if necessary.
- 3. Click **Search** to display all the users or enter search parameters to filter your search.
- 4. Click on the **Edit** link at the end of the row of the user or click anywhere in the row for which you want to configure Announcements. The Advanced: User Modify page opens.
- 5. Select the Announcements tab.

Advanced: User Modify Modify an existing Clearspan user.			
Changes made on previous pages have NOT been saved! To save the changes, you must press OK or Apply on this page.			
OK Cancel Apply Delete			
Enterprise: clearspanlab – Clearspan LAB Group: sales organization – Sales Organization User: Sales, User3 (6063338903@clearspanlab.com) Service: (Select Service) •			
User Optional Phones Announcements			
		(Close Other Tab	s)
Repository Information Total Size of Repository: 0.0MB used out of 1.0GB allocated Add Announcement			
Announcement Search Announcement Type: (Audio Only)			
(All Announcements) Contains Search Select All Announcements: Delete Selected Announcements (Only announcements that are not in use can be deleted.)			
Announcements			
Selected Name 🗘 Type 🗘	Size (KB) 💠	Usage Count 💠	Edit
Profile Test WAV	2584	0	Edit
- End -			

Figure 89: Advanced: User Modify Page – Announcements Tab

- 6. To upload a new file, click Add Announcement. Enter an Announcement Name, and click Browse to choose the audio or video file to upload. Supported file types include WAV, WMA, MOV, or 3GP. Click OK. The new announcement appears in the Announcements list.
- 7. To rename or replace an announcement, search for the announcement. Search results appear in the list at the bottom of the page. Click Edit on the row of the announcement you want to modify. Make any desired changes on the Announcement Modify page, and then click OK.
- **8.** To delete an announcement, select it in the search results list and click Delete Selected Announcements, or click Delete on the Announcement Modify page. You cannot delete announcements that are in use.
- 9. Click OK or Apply. You *must* click OK or Apply again to save your changes.

Failure Error Messages

When you click OK to finish creating or modifying a user, any errors that prevent the user from being created or changed will be reported at the top of the page as in Figure 90: User Add Error Messages. Failures are also reported on the User Add Messages page.

Advanced: User A Select a User Profile and complete	Add the user information to add a new Clearspan user.	
Last Name is required. First Name is required. Phone Number and/or User Password and Co [Details] Clearspan Use	Extension are required.	
OK Cancel		
Enterprise: Group: User:	clearspantab – Clearspan LAB sales organization	
Service:	(Select Service)	
User Optional Phones A	Innouncements	
	(C)	lose Other Tabs)
User Classification		
User Profile:	(Select User Profile) -	
Clearspan User		
* Last Name:	* First Name:	
E-mail Address:		
	Vse Organization ID	
Account ID:	ose organization to	
User Billing Type:	Default: (USER)	
Department:		
Phone Number:	(Select Phone Number)	
Extension:		
Voice Mail:	No Voice Mail *	
Voice Portal Passcode:	(create a numeric passcode of 4 to 8 digits)	
Confirm Portal Passcode:		

Figure 90: User Add Error Messages

User Add Message While adding a Clearspan user, the	es user was sucessfully added but a failure occurred while completing non-essential configuration.
ОК	
Enterprise: Group: User:	Bulk Provisioning Lab Val, Inc Group_G Group, Gewel Smith, Tom (9722221051@labval.mitel.com)
Failure	
User:	Smith, Tom (9722221051@labval.mitel.com)
Primary Phone Device:	Aastra6869iDMS-9722221051
Failure:	User successfully added! However, related configuration failed set up:
	Voice Mail: Unable to add Surgemail User Account: A user (9722221051@tb20.aastra.com) already exists existing user in database

Figure 91: User Add Failure Page

Configuring Advanced User Features

When you add or modify a user, the Service drop-down list allows you to configure the following additional features:

- Alternate Numbers
- Authorization Codes
- Busy Lamp Field (BLF)
- Call Center Agent
- Call Center Supervisor
- Call Forward
- Call Forward Selective
- Call Pickup
- Call Recording
- Clearspan Anywhere
- Fax Messaging
- Flexible Seating Guest
- Hoteling Guest
- Hoteling Host
- Hunt Group
- Integrated IM&P
- Music On Hold
- Priority Alert
- Privacy
- Sequential Ring
- Simultaneous Ring
- Speed Dial 8
- Speed Dial 100
- Voice Mail
- Voice Mail Distribution Lists
- Voice Mail Greetings

Alternate Numbers

Alternate Numbers allows you to add up to ten additional phone numbers or extensions to be assigned in addition to your primary number and extension. All additional numbers and extensions ring your phone (s) just like your primary phone. In addition, you can specify a distinctive ringing pattern for each number, if your phone supports it.

- 1. From the main menu, select **Provisioning** and then **Users**. The **Users** page opens.
- 2. Select the Enterprise and Group from the drop-down list, if necessary.
- 3. Click Search to display the users or enter search parameters to filter your search.

- 4. Click on the **Edit** link at the end of the row or click anywhere in the row for which you want to set up alternate numbers. The **Advanced: User Modify** page opens.
- 5. Select Alternate Numbers from the Service Drop-down list. The Alternate Numbers tab opens as in the following example:

		ed: User Modi ng Clearspan user.	fy						
	ок	Cancel Appl	y Delete						
	Enterprise: clearspanIab Clearspan LAB Group: sales organization Sales Organization User: Sales, User3 (6063338903@clearspanIab.com) Service: Alternate Numbers								
Use	r Optio	onal Phones Announc	ements Alternate N	umbers					
				1		(Close Tab) (Pir			
	Alternat	te Numbers							
		i just like your primary phon ns for you. Distinctive Ring: 📝	e. In addition, you can	specity a distinctive	ringing pattern for each nun	nber, if your phone supports it. Only your administrator can configure new n			
					Alternate Numbers				
	ID	Phone Number	Activated	Extension	Ring Pattern	Description			
-	1	606-333-8904 💌		5123	Long-Long 👻				
	2	606-333-8906 💌			Long-Long 👻				
	3	606-333-8909 🔹			Short-Short-Long 💌				
	4	606-333-8924 💌			Short-Long-Short				
	5	(None) 👻			Normal 👻				
	6	(None) 👻			Normal 👻				
	7	(None) 👻			Normal 👻				
	8	(None) 🔹			Normal 👻				
	9	(None) 🔹			Normal 👻				
	10	(None) 🔹			Normal 👻				
				-	End of Alternate Numbers -	-			

Figure 92: Advanced: User Modify Page

- 6. To add an alternate number, select a Phone Number, enter an Extension, select the Ring-Pattern from the drop-down list, and enter the Description. The Ring Pattern is available in the following formats:
 - Long-Long
 - Short-Short-Long
 - Short-Long-Short formats.
- 7. Click the Activated check box to activate the alternate number.
- 8. Click OK or Apply.
- 9. To view the Alternate Numbers:
 - a. From the main menu, select **Provisioning** and then **Users**. The **Users** page opens.
 - b. Select the Enterprise and Group from the drop-down list, if necessary.
 - c. Click Search to display the users or enter search parameters to filter your search.

- **d.** Click the **View** link in the row of the user to view the alternate numbers. The **Advanced: User View** page opens.
- e. Select Alternate Numbers from the Service drop-down list. The Alternate Numbers tab displays as in the following example:

OK							
	Group		ation Sales Or 6063338903@)		
Jser Opti	ional Phones			umbers			
				1			(Close Tab) (Pin Tab) (Close Ot
Alternate phone(s		mary phone. In ac				your primary number and extension mber, if your phone supports it. Only	
Alternate phone(s	e Numbers allows ;) just like your pri ons for you.	mary phone. In ac					
Alternate phone(s	e Numbers allows ;) just like your pri ons for you.	mary phone. In ac			ve ringing pattern for each r		
Alternate phone(s extensio	e Numbers allows) just like your pri ons for you. Distinctive Ring	mary phone. In ac	ldition, you can	specify a distinctiv	Alternate Numbers	imber, if your phone supports it. Onl	
Alternate phone(s extensio	e Numbers allows) just like your pri ons for you. Distinctive Ring Phone Numb	mary phone. In ac	Idition, you can Activated	specify a distinctiv	ve ringing pattern for each r Alternate Numbers Ring Pattern	imber, if your phone supports it. Onl	
Alternate phone(s extensio	e Numbers allows) just like your pri ons for you. Distinctive Ring Phone Numbr 6063338904 6063338906 6063338909	mary phone. In ac	Idition, you can Activated	specify a distinctiv	Alternate Numbers Ring Pattern Long-Long Short-Short-Long	imber, if your phone supports it. Onl	
Alternate phone(s extensio	e Numbers allows b) just like your prives ins for you. Distinctive Ring Phone Number 6063338904 6063338906	mary phone. In ac	Idition, you can Activated	specify a distinctiv	Alternate Numbers Alternate Numbers Ring Pattern Long-Long Long-Long Short-Short-Long Short-Short	imber, if your phone supports it. Onl	
Alternate phone(s extension ID 1 2 3 4 5	e Numbers allows) just like your pri ons for you. Distinctive Ring Phone Numbr 6063338904 6063338906 6063338909	mary phone. In ac	Idition, you can Activated	specify a distinctiv	Alternate Numbers Alternate Numbers Ring Pattern Long-Long Long-Short-Short-Long Short-Short-Long Normal	imber, if your phone supports it. Onl	
Alternate phone(s extensio	e Numbers allows) just like your pri ons for you. Distinctive Ring Phone Numbr 6063338904 6063338906 6063338909	mary phone. In ac	Idition, you can Activated	specify a distinctiv	Alternate Numbers Alternate Numbers Ring Pattern Long-Long Short-Short-Long Short-Long-Short Normal Normal	imber, if your phone supports it. Onl	
Alternation phone (sextension) and the sextension of the sextensio	e Numbers allows) just like your pri ons for you. Distinctive Ring Phone Numbr 6063338904 6063338906 6063338909	mary phone. In ac	Idition, you can Activated	specify a distinctiv	Alternate Numbers Ring Pattern Long-Long Long-Long Short-Short-Long Short-Long-Short Normal Normal Normal Normal	imber, if your phone supports it. Onl	
Alternate phone(s extensio	e Numbers allows) just like your pri ons for you. Distinctive Ring Phone Numbr 6063338904 6063338906 6063338909	mary phone. In ac	Idition, you can Activated	specify a distinctiv	Alternate Numbers Alternate Numbers Ring Pattern Long-Long Short-Short-Long Short-Long-Short Normal Normal	imber, if your phone supports it. Onl	

Figure 93: Advanced: User View Page

Authorization Codes

Authorization Codes allows you to add or delete Communication Barring Authorization Codes for a user.

- 1. From the main menu, select **Provisioning** and then **Users**. The Users page opens.
- 2. Select the Enterprise and Group from the drop-down list, if necessary.
- 3. Click Search to display the users or enter search parameters to filter your search.
- 4. Click on the **Edit** link at the end of the row or click anywhere in the row for which you want to set up authorization codes. The Advanced: User Modify page displays.
- 5. Select **Authorization Codes** from the **Service** Drop-down list. The Auth. Codes tab opens as shows in the following example.

dify an existing Clearspan use	Nodify						
OK Cancel	Apply	Delete					
Enterprise: Group: User: Service:	sales organization Sales, User1 (606	n Sales Orga 53338901@cle					
User Optional Phones A	Announcements	Auth Codes					(Close Tab) (Pin Tab
Communication Barring A	uthorization Codes						(Close Tab) (Pin Tab
Create new Communicatio			I manage existing code	S.			
Authorization Codes:	Add Authoriza	tion Code					
		C	ommunications Barri	ng Authorization Cod	es		
Authorization Code			Descriptio	n \$		Delete	
No Authorization Codes e	xist.						
			End of Author	ization Codes -			

Figure 94: Advanced: User Modify Page – Auth Codes Tab

- 6. Click Add Authorization Code.
- 7. To add a code, enter an Authorization Code and Description. Click Delete to delete an existing code.
- 8. Click OK or Apply.

Busy Lamp Field (BLF)

The Busy Lamp Field (BLF) feature allows a station in the network to monitor the call state of other stations in the network. For example, an executive assistant or "front desk" operator might be equipped with an enhanced station that offers enough line keys to adequately monitor a large set of lines in the network. When calls arrive for a user that has a line that is being monitored, the operator can easily determine if the user is busy, by looking at the lamp associated with the line key of that user, and make appropriate call routing decisions.



Note: Busy Lamp Field is a service that must be assigned to the user on Clearspan, and a key must be assigned on the user's phone for every user monitored.

- 1. From the main menu, select **Provisioning** and then **Users**. The Users page opens.
- 2. Select the Enterprise and Group from the drop-down list, if necessary.
- 3. Click **Search** to display the users or enter search parameters to filter your search.
- 4. Click on the **Edit** link at the end of the row or click anywhere in the row of the user that will be allowed to monitor other users' phone status. The Advanced: User Modify page opens.
- Select Busy Lamp Field (BLF) from the Service drop-down list. The BLF tab opens as shown in the following example.

Advanced: User Modify Modify an existing Clearspan user.	
OK Cancel Apply Delete	
Enterprise: clearspanlab – Clearspan LAB Group: sales organization – Sales Organization User: Sales, User1 (6063338901@clearspanlab.com) Service: Busy Lamp Field (BLF)	
User Optional Phones Announcements Auth Codes BLF	
Busy Lamp Field	(Close Tab) (Pin Tab)
Busy Lamp Field (BLF) allows monitoring of another user's phone status. * BLF List URI: sip: @ Clearspanlab.com • Restart Phones on Save (Only when the BLF list URI is add User Search: (All Users) • Contains: •	ed or deleted)
Available Users	Monitored Users
Add > Remove < Add All >> Remove All <<	

Figure 95: Advanced: User Modify Page - BLF Tab

6. Enter the BLF List URI, for example, <u>9785551003BLF@moorehouse.com</u>. This name MUST be unique. You can choose any name, but it cannot be duplicated elsewhere in the system.



Note: Select the **Restart Phones on Save** check box only when a BLF list URI is added, or the existing BLF list URI is deleted by adding a new BLF List URI.

- **7.** Click Search to display all users available for assignment; or, enter parameters to narrow the search.
- 8. Select the users that you want to be in the BLF **Monitored Users** list. You can use Shiftless to select specific users.
- Click Add to add the specific users to the list, or click Add All to add all users to the list of those to be monitored. Use Remove or Remove All to remove users from the list. Use Move Up or Move Down to reorder the list. The ordering dictates the order in which the Bluffs will appear on the user's phone.
- 10. Click OK or Apply.

Call Center Agent

The Call Center Agent tab allows you to set the Automatic Call Distribution (ACD) state and to add or remove users from the ACD call center.

- 1. From the main menu, select **Provisioning** and then **Users**. The Users page opens.
- 2. Select the Enterprise and Group from the drop-down list, if necessary.
- 3. Click Search to display the users or enter search parameters to filter your search.

- 4. Click on the **Edit** link at the end of the row or click anywhere in the row of the user that will be allowed to monitor other users' phone status. The Advanced: User Modify page opens.
- 5. Select **Call Center Agent** from the **Service** drop-down list. The Call Center Agent tab opens as shown in the following example:

Advanced: User Modify
Modify an existing Clearspan user.
OK Cancel Apply Delete
Enterprise: clearspanlab Clearspan LAB Group: sales organization Sales Organization User: Sales, User3 (6063338903@clearspanlab.com) Service: Call Center Agent
User Optional Phones Announcements Call Center Agent
(Close Tab) (Pin Tab)
Call Center Agent Call Center Agent provisions the user's ACD settings and all the ACDs to which the user belongs and is currently joined.
General Settings
Call Center Service Assigned: Premium
Guard Timer Setting:
Use User Guard Timer Setting
Enable guard timer for 5 seconds
ACD State of the Agent: Sign-Out
Agent Threshold Profile: Default Agent Threshold Profile
Make outgoing calls as: (None)
Availablility Settings
Agent Availability Settings: Use Default Agent Availability Settings
Use User Agent Availability Settings
Force agent to unavailable on Do Not Disturb activation
Force agent to unavailable after 3 consecutive bounced calls
Force agent to unavailable on not reachable
Force agent to unavailable on personal calls
Assign Call Center (None) -
Agent's Call Centers
Join ☆ Call Center Name ☆ Phone Number ☆ Extension ☆ Routing Type ☆ Skill Level ☆

Figure 96: Advanced: User Modify Page – Call Center Agent Tab

- 6. Select the agent's **Guard Timer Setting**. **Default** uses the default settings. U**ser** overrides the default setting for the user. The guard timer is used to provide a short interval between the time that a call ends and the time that a new call is offered to the agent. The typical setting is 2 through 5 seconds.
- 7. Set the ACD State of the Agent from the drop-down list. The agent can change the ACD state from the web portal as well as from the client.
- **8.** Select the **Agent Threshold Profile** which should be applied to this agent. An Agent Threshold Profile is an optional set of warning thresholds configured for an agent to track metrics.
- **9.** Enable **Make outgoing calls as** to configure the agent's outgoing calls setting. This setting might not be available for some call centers.
- Select the Agent Availability Settings to manage the availability to receive inbound calls from the call centers. Default uses the default settings. User overrides the default setting for the user.

- **11.** To assign the user as an agent for a call center, select the **Assign Call Center** button after choosing the call center from the drop-down list. A new row is added to the Agent's Call Centers list.
- 12. If required, select a Skill Level from the drop-down menu in the Agent's Call Centers list. Check Join to have the user join that call center. Clear Join to remove the user from that call center. Select the Remove link to remove the call center from the list.
- 13. Click OK or Apply.

Call Center Supervisor

The Call Center Supervisor tab allows you to assign supervisors for a call center.

- 1. From the main menu, select **Provisioning** and then **Users**. The Users page opens.
- 2. Select the Enterprise and Group from the drop-down list, if necessary.
- 3. Click **Search** to display the users or enter search parameters to filter your search.
- 4. Click on the **Edit** link at the end of the row or click anywhere in the row of the user that will be allowed to monitor other users' phone status. The Advanced: User Modify page opens.
- Select Call Center Supervisor from the Service drop-down list. The Call Center Supervisor tab opens.

Advanced: User Modify Modify an existing Clearspan user.	
OK Cancel Apply Delete	
Enterprise: clearspanlab Clearspan LAB Group: sales organization Sales Organization User: Sales, User3 (6063338903@clearspanlab.com) Service: Call Center Supervisor	
User Optional Phones Announcements Call Center Supervisor	
	(Close Tab) (Pin Tab) (Close Other Tabs)
Call Center Supervisor Call Center Supervisor allows user to be assigned as supervisor for a Call Center.	
Available Call Centers	Assigned Call Centers
Add > Remove < Add All >> Remove All <<	<u>`</u>
	Assign Agents to be Supervised

Figure 97: Advanced: User Modify Page – Call Center Supervisor Tab

- 6. Use Add and Remove to assign available supervisors to a call center.
- 7. Click Assign Agents to be Supervised assignation to the supervisor the agents to be supervised. The Supervisor: Agent Assignment page appears. Click OK or Apply.
- 8. Select the Call Center and search the available agents using the search filters in the **Call Center Search** drop-down list. The list of Available agents appears.

9. Use Add and Remove to assign available agents to be supervised.

Call Forward

E/

Call Forwarding allows you to forward some or all calls to a different phone number or SIP-URI, such as a home office or cell phone.

Note: Call Forwarding is a service that must be assigned to the user on Clearspan.

- 1. From the main menu, select **Provisioning** and then **Users**. The Users page opens.
- 2. Select the Enterprise and Group from the drop-down list, if necessary.
- 3. Click **Search** to display the users or enter search parameters to filter your search.
- 4. Click on the **Edit** link at the end of the row or click anywhere in the row of the user for which you want to set up call forwarding. The Advanced: User Modify page opens.
- **5.** Select Call Forward from the Service Drop-down list. The Call Forward tab opens, as shown in the following example.

Advanced: User M Modify an existing Clearspan user.	odify
OK Cancel	Apply Delete
Group:	clearspanlab Clearspan LAB sales organization Sales Organization Sales, User3 (6063338903@clearspanlab.com) Call Forward
User Optional Phones An	nouncements Call Forward
	(Close Tab) (Pin Tab) (C
Answer, and Not Reachable) permitted by your outgoing ca	o forward some or all of your incoming calls to a different phone number or SIP-URI, such as your home office or cell phone. The type of forwarding (Always, Bus i determines whether a call is forwarded and the number to which that call is forwarded. The address (phone number or SIP-URI) you forward your calls to must to alling plan. For Call Forwarding Always, you can also make your primary phone emit a short ring burst to inform you if you are next to your phone when the call is This is important when you have forgotten the service is turned on and you are at your primary phone waiting to receive calls.
Always	
Call Forwarding Always:	On I Off
* Forward-To Number:	(Phone Number or SIP-URI)
Ring Reminder:	Play Ring Reminder when a call is forwarded
Busy	
Call Forwarding Busy:	○ On ● Off
* Forward-To Number:	(Phone Number or SIP-URI)
No Answer	
Call Forwarding No Answer:	On Off
* Forward-To Number:	(Phone Number or SIP-URI)
Rings Before Forwarding:	(This setting also affects Sequential Ring Number of Rings for Base Location and Voice Mail Greetings Number of Rings)
Not Reachable	
Call Forward Not Reachable:	On Off
* Forward-To Number:	(Phone Number or SIP-URI)

Figure 98: Advanced: User Modify Page – Call Forward Tab

- 6. Click On for Call Forwarding Always to have calls always forwarded, and enter a number or SIP-URI for the Forward-To Number destination. Select the Ring Reminder box to hear a short ring burst when the call is forwarded. This is important when users have forgotten the service is turned on and are at their primary phone waiting to receive calls.
- 7. Click **On** for **Call Forwarding Busy** to have calls forwarded when the primary phone is busy, and enter a number or SIP-URI for the **Forward-To Number** destination.
- 8. Click On for Call Forwarding No Answer to have calls forwarded when the primary phone is not answered, and enter a number or SIP-URI for the Forward-To Number destination. Select the Rings Before Forwarding to set the number of rings to occur before the call is forwarded on No Answer.
- **9.** Click **On** for **Call Forwarding Not Reachable** to have calls forwarded when this number is not reachable, and enter a number or SIP-URI for the **Forward-To Number** destination.
- 10. Click OK or Apply.

Call Forward Selective

E/

Call Forward Selective allows you to forward specific calls matching pre-defined criteria. This feature is useful for forwarding calls from a manager, family member, or important client, or for forwarding calls during a certain time.

Note: Call Forwarding is a service that must be assigned to the user on Clearspan.

- 1. From the main menu, select **Provisioning** and then **Users**. The Users page opens.
- 2. Select the Enterprise and Group from the drop-down list, if necessary.
- 3. Click **Search** to display the users or enter search parameters to filter your search.
- 4. Click on the **Edit** link at the end of the row or click anywhere in the row of the user for which you want to set up call forwarding. The Advanced: User Modify page opens.
- 5. Select Call Forward Selective from the Service Drop-down list.
- 6. Click **On** for Call Forwarding Selective to have specific calls forwarded, and enter a number or SIP-URI for the **Default Forward-To Number** destination. Select the **Ring Reminder** box to hear a short ring burst when the call is forwarded. This is important when users have forgotten the service is turned on and are at their primary phone waiting to receive calls.
- 7. Click Add Forwarding Criteria to create a new set of call forwarding criteria, or click Edit in the Forwarding Criteria table to modify or delete existing criteria. The Forwarding Criteria table displays the Calls From and Calls To columns. The Calls To criteria indicates if calls are forwarded based on the destination that was dialed. The User: Call Forwarding Selective page opens.
- 8. Enter a Name/Description for the call forwarding selective entry.
- 9. Choose to forward calls to the default number or another number, or choose Do Not Forward.
- 10. Specify the Time Schedule and/or Holiday Schedule for which to forward calls.
- 11. Choose to forward All Calls or calls from specific numbers. If you specify Calls from the following Phone Numbers, you can choose calls from Private Numbers and/or calls from

Unavailable Numbers. You can also enter **Specific Phone Numbers** or number patterns using wildcard characters.

- 12. Choose the numbers from the Available Call To Numbers list in the Calls To section, and click Add to use the number for the Calls To criteria.
- **13.** Click **OK**.

Call Pickup

The Call Pickup feature allows users to answer calls received by other people within the same Call Pickup Group to which they are assigned.



Note: A Call Pickup group must be created on the Clearspan system before a user can be assigned to a group.

- 1. From the main menu, select **Provisioning** and then **Users**. The Users page opens.
- 2. Select the Enterprise and Group from the drop-down list, if necessary.
- 3. Click Search to display the users or enter search parameters to filter your search.
- 4. Click on the **Edit** link at the end of the row or click anywhere in the row of the user for which you want to set up call pickup. The Advanced: User Modify page opens.
- 5. Select Call Pickup from the Service Drop-down list.
- 6. Select the Call Pickup Group.
- 7. The User's Last Name, First Name, and User ID display under the Call Pickup group assignment.
- 8. Click OK or Apply.

Advanced: User Modify

iouily al	in existing of	earspan us	ei.				
0	ĸ	Cancel	Apply	Delete			
		Enterprise Grou Use Service	p: sales organizati r: Sales, User1 (6	tion Sales Organization 5063338901@clearspanlab.com	i -		
User	Optional	Phones	Announcements	Call Pickup			
	-						(Close Tab) (Pin Tab) (Close C
	Call Pick	up					
Ca		lows you to		zation_Pickup_Group	I Pickup Group to which you are assign		
					gned to Call Pickup Group 'Sales_Organ		
Last Na	ame 🔅		First Name 💠	Department 💠	Phone Number 🗇	Extension 🔅	User ID 👌
Sales			User1		6063338901	8901	6063338901@clearspanlab.com
					- End of Users -		

Figure 99: Advanced: User Modify Page – Call Pickup Tab

Call Recording

The Call Recording feature allows you to configure the recording settings for a new or existing user.

- 1. From the main menu, select **Provisioning** and then **Users**. The Users page opens.
- 2. Select the Enterprise and Group from the drop-down list, if necessary.
- 3. Click Search to display the users or enter search parameters to filter your search.
- 4. Click on the **Edit** link at the end of the row or click anywhere in the row of the user for which you want to set up call recording. The Advanced: User Modify page opens.
- 5. Select Call Recording from the Service Drop-down list.

Advanced: User M Modify an existing Clearspan user.	lodify
OK Cancel	Apply Delete
the second se	clearspanlab Clearspan LAB sales organization Sales Organization Sales, User3 (6063338903@clearspanlab.com) Call Recording -
User Optional Phones A	nnouncements Call Recording
	(Close Tab) (Pin Tab) (Cl
Call Recording Call Recording allows you to	p record calls.
Record Call:	Never Always Always with Pause/Resume On Demand On Demand with User Initiated Start
Options:	Play Call Recording Start/Stop Announcement Record Voice Messaging
Pause/Resume Notification:	None Beep Play Announcement
Recording Notification:	Repeat Record Call Warning Tone Every 15 seconds

Figure 100: Advanced: User Modify Page – Call Recording Tab

The Record Call setting determines when and how the user's calls are recorded.

- 6. Enable the **Play Call Recording Start/Stop Announcement** option to play an announcement when starting or stopping the recording of a call.
- 7. Enable the Record Voice Messaging option to record calls that go to Voice Mail.
- 8. The **Pause/Resume Notification** setting determines whether to play a beep or announcement notification when pausing or resuming the recording.
- **9.** Enable **Repeat Record Call Warning Tone Every X seconds** to repeat a periodic warning tone to the caller to indicate that the call is being recorded. The time values range from 10 to 1800 seconds.
- **10.** Click OK or **Apply**.

Clearspan Anywhere

The Clearspan Anywhere feature allows you to view a list of available Clearspan Anywhere Portals, and manage the Clearspan Anywhere phone numbers.

- 1. From the main menu, select **Provisioning** and then **Users**. The **Users** page opens.
- 2. Select the Enterprise and Group from the drop-down list, if necessary.
- 3. Click **Search** to display the users or enter search parameters to filter your search.
- **4.** Click on the **Edit** link at the end of the row or cllick anywhere in the row of the user for which you want to configure the Clearspan Anywhere feature. The **Advanced: User Modify** page opens.
- 5. Select Clearspan Anywhere from the Service Drop-down list. The Clearspan Anywhere tab appears.

	vanced: y an existing Cl						
	ОК	Cancel	Apply	Delete			
		Enterprise Group Use Service	 sales organizati r: Sales, User3 (6 	ion Sales Organizati 063338903@clearspa			
U	ser Optional	Phones	Announcements	Clearspan Anywhen	e		
		· · · · · ·					(Close Tab) (Pin Tab) (C
	Clearspan An	nywhere					
	Setup Clears	ban Anywhe	ere for the fixed pho	nes and mobile phone	s you would like t	to link to this account.	
		Alertin	a: 🔲 Alert all loo	ations for Click-to-Dia	calls		
			Alert all loc	ations for Group Pagi	ng calls		
	Avai	lable Portal	s: Available Porta	I List	-		
	Ph	one Numbe	Add Phone	Number			
					Cle	earspan Anywhere Phone Numbers	
	Phone Numbe	ег о				Description 👌	Edit

Figure 101: Advanced: User Modify Page – Clearspan Anywhere

- **6.** Enable the Alert all locations for Click-to-Dial calls option and/or Alert all locations for Group Paging calls option.
- 7. Click Available Portal List to view a list of available Clearspan Anywhere Portals, the Available Clearspan Anywhere Portals page appears.

vailable Clearsp a all available Clearspan Anyw	here portals for the user.	rtals			
OK					
Enterprise:	clearspanlab Clearspan LAB				
Group:	sales organization Sales Org	anization			
User: Sales, User1 (6063338901@clearspanlab.com)					
	Clearspan Anywhere F	Portals Available to the User			
Portal Name 👌 Phone Number 👌 Extension 👌 Language 👌					
sales			English		

Figure 102: Available Clearspan Anywhere Portals page

8. Click Add Phone Number in the Advanced: User Modify page to add Clearspan Anywhere phone numbers, the User: Clearspan Anywhere Phone Number Add page appears, or click Edit in the row of Clearspan Anywhere Phone Numbers table to edit Clearspan Anywhere phone numbers, then the User: Clearspan Anywhere Phone Number Modify page appears.

			e number. *Pressing OK or	Delete retains but does not save entered changes. To s	ave the chan		
OK* Cancel	Delete*						
Enterpris Grou Usi		.com)					
Phone Number	_						
* Phone Number	er: 6063338905						
Descriptio	on:						
Enab	le: 📝 Enable this Location	Enable this Location					
Outbound Alternate Numb							
Optior	Enable Diversion Inhibitor						
		Require Answer Confirmation					
	Use Clearspan-based Call Control Se	ervices					
Selective Criteria							
New Criter	ia: Add Selective Criteria						
		Selectiv	ve Criteria				
*	me / Description 💠	Clearspan Anywhere 💠	Calls From 💠	Calls To 💠	Edit		
Sel	lect1	Yes	All Calls	Any Number	<u>Edit</u>		
		- End of Sele	ective Criteria -				

Figure 103: Available Clearspan Anywhere Portals page

Each Clearspan Anywhere phone number consists of phone number-specific settings, along with a list of Selective Criteria that determine the calls that are to be handled using Clearspan Anywhere.

- **9.** Enter or modify the Clearspan Anywhere phone number and description. Select the **Enable** checkbox to enable access to the configured Clearspan Anywhere location.
- **10.** Enter or modify the **Outbound Alternate Number**. The **Outbound Alternate Number** allows you to add an outbound number or SIP URI to use when an alternate number must be dialed to reach this Clearspan Anywhere location.
- 11. Select the options to Enable Diversion Inhibitor (specifies whether calls to this Clearspan Anywhere location may be redirected. If this setting is enabled, internal and PSTN/PLMN calls cannot be redirected), Require Answer Confirmation (specifies whether calls to this Clearspan Anywhere location require a confirmation digit be entered by the answering party. Enabling this setting ensures that calls either connect to a live party or roll over to your Clearspan mailbox), and/or Use Clearspan-based Call Control Services (specifies whether the Clearspan Anywhere location uses its own device or Clearspan for call control).
- **12.** Click the **Active** check box to activate a Selective Criteria or clear the **Active** check box to deactivate the Selective Criteria. Click **OK**.
- **13.** Click **Add Selective Criteria** to Add a Selective Criteria, or Click **Edit** in the **Selective Criteria** table to modify the Selective Criteria.

User: Clearspan A	Anywhere Selective Criteria Modify			
	a Clearspan Anywhere phone number. *Pressing OK or Delete retains but does not save entered changes. To save the changes, press OK or Apply on the subsequent page.			
OK* Cancel	Delete*			
Group:	clearspanlab Clearspan LAB sales organization Sales Organization Sales, User1 (6063338901@clearspanlab.com)			
Selective Criteria				
Phone Number:	6063338905			
* Name / Description:	Select1			
	© Use Clearspan Anywhere			
	O Do not use Clearspan Anywhere			
Time Schedule:	Every Day All Day			
Holiday Schedule:	None -			
Calls From				
Calls From:	All Calls (from any phone number)			
	Calls from the following Phone Numbers:			
	Private Numbers			
	Unavailable Numbers			
	Specific Phone Numbers: (wildcard characters: ? for any digit; trailing * for multiple digits)			
Calls To				
Select called numbers that	this criteria applies to. When no numbers are selected, the called number is not used as part of the criteria.			
Available Call To	Numbers Selected Call To Numbers			
Primary (6063338901 / 890				
	Add>			
	Remove <			
	Add All >>			

Figure 104: Clearspan Selective Criteria Modify page

- **14.** Enter the Name or Description of the Selective Criteria, select a Time Schedule and/or Holiday Schedule to determine when the criteria apply.
- **15.** The received calls that use a Selective Criteria are based on the **Calls From** settings. Select or Enter one or more of the following phone numbers to use the selective criteria:
 - Select All Calls (from any phone number)
 - Select Call from the following Phone Numbers, and select the check box Private Numbers and/or Unavailable Numbers
 - Enter Specific Phone Numbers (upto 12 numbers)
 - The Phone numbers digit strings can include digits from 0 through 9, and the following wildcard characters:
 - * (star) This wild card can only be used as the last character of the digit strings and matches any number of trailing digits. For example 60833374*
 - -? (question mark) This wild card can be used anywhere in the string and matches any single digit. For example: 608???114 or 6?833?7?23 or 60?33374*
- 16. Click the Available Call To Numbers from the Calls To section, and click Add to add a Call To number to the Selected Call To Numbers list. When a received call uses the criteria, the Calls To settings determine the user's phone numbers that will use the selected criteria when

called. The phone numbers in the **Available Call To Numbers** list includes the users Primary number and any configured Alternate Numbers.

17. Click OK.

Fax Messaging

The Fax Messaging feature allows users to receive faxes over a dedicated phone number.

- 1. From the main menu, select **Provisioning** and then **Users**. The Users page opens.
- 2. Select the Enterprise and Group from the drop-down list, if necessary.
- 3. Click **Search** to display the users or enter search parameters to filter your search.
- 4. Click on the **Edit** link at the end of the row or click anywhere in the row of the user for which you want to set up fax messaging. The Advanced: User Modify page opens.
- 5. Select Fax Messaging from the Service Drop-down list.
- 6. Check the Enable Fax Messaging box to enable fax messaging for this user.
- 7. Select a **Phone Number**. A phone number is required when Fax Messaging is enabled. The phone number is pre-selected based on the Phone Number selection rules specified in the User Profile, if one is used.
- 8. Activated or Deactivated indicates the current status of the phone number selected. Change this setting if necessary. Select Activated (Recommended) if the phone will receive fax messaging from outside the system, or Deactivated if fax messaging will be internal only. The Activated/Deactivated status is preselected based on the New Phone Number Activation setting specified in the User Profile, if one is used.
- **9.** You can enter an **Extension** for Fax Messaging. This field is optional. The extension is pre-populated based on the Extension generation rules provided in the User Profile.
- 10. You can enter up to three optional SIP Aliases.
- **11.** You can configure the user's account so that any fax message received by Voice Mail is sent to email.
 - a. Select Voice Mail from the Service Drop-down list.
 - **b.** Enable **Send Notification to E-mail Address** or **E-mail Carbon Copy to E-mail Address** and enter a valid email address. Any fax message received is sent to the email address listed.



CAUTION: E-mail copies of Voice Mail might not be sent over secure E-mail.

12. Click OK or Apply.

Advanced: Use	er Modify	
Modify an existing Clearspan		
OK Cancel	Apply Delete	
Enterp	orise: clearspanlab – Clearspan LAB	
Gr	roup: sales organization Sales Organization	
L	User: Sales, User3 (6063338903@clearspanlab.com)	
Sen	vice: Fax Messaging 👻	
User Optional Phone	es Announcements Fax Messaging	
		ose Tab) (Pin Tab) (
Fax Messaging		
Fax Messaging allows	s you to receive faxes over a dedicated phone number.	
Enable Fax Messag	iging:	
Phone Num	mber: (None) -	
Exten	ision:	
Alia	ases; sip: @ clearspanlab.com -	
Alla		
	sip: @ clearspanlab.com +	
	sip: @ clearspanlab.com -	

Figure 105: Advanced: User Modify Page – Fax Messaging Tab

Flexible Seating Guest

Flexible Seating Guests can be associated with a Flexible Seating host device, to use it as if it were their own phone. Flexible Seating Guests can be any users within the relevant Group or Enterprise who have the "Flexible Seating Guest" service assigned, and who have a primary device configured that is the same device type as the host device. While a guest is associated with it, the host phone functions like the user's phone device, including all the key assignments and functions.

- 1. Complete the steps for Configuring Flexible Seating Hosts.
- 2. Then, from the main menu, select **Provisioning** and then **Users**. The Users page opens.
- 3. Select the Enterprise and Group from the drop-down list, if necessary.
- 4. Click **Search** to display the users or enter search parameters to filter your search.
- 5. Click on the **Edit** link at the end of the row or click anywhere in the row of the user who will be the Flexible Seating Guest. The Advanced: User Modify page opens.
- 6. Select Flexible Seating Guest from the Service drop-down list.

Advanced: User M Modify an existing Clearspan user.	
OK Cancel	Apply Delete
Enterprise: Group: User: Service:	
User Optional Phones A	nnouncements Flexible Seating Guest
	(Close Tab) (Pin Tab)
Flexible Seating Guest	
Flexible Seating Guest allo	vs a user to associate their device profile with a flexible seating host.
Flexible Seating Guest:	On Off
Association Limit:	Limit Association to 12
Unlock Phone PIN Code:	
Phone Device:	(None) •
Line / Port:	@ clearspanlab.com -

Figure 106: Advanced: User Modify – Flexible Seating Guest Tab

- 7. Select **On** to enable this user as a Flexible Seating Guest.
- 8. Select the **Association Limit** check box, and the number of hours, if you want to limit the amount of time that the association is active once activated. If an Association Limit is not configured for the guest or the host, the guest is allowed to stay logged onto the host phone indefinitely.
- **9.** Enter an **Unlock Phone PIN Code** if entry of a code is required at the time the user associates with the host phone using the voice portal. If used, the code must be between 4-10 characters.
- **10.** Select the **Phone Device**. The drop-down provides all primary line and SCA devices associated with this user (Mitel and Polycom phones). When you select a phone device, the **Line/Port** field populates automatically.

Associating with a Flexible Seating Phone in OpEasy

- 1. In the **Associated Host** section of the Flexible Seating Guest tab of the User page, click **Search** to view all Available Hosts for this group or enterprise that are built with the device type that matches the guest phone's device type.
- 2. Select the host from the Available Hosts list and click **Associate Host**. The screen refreshes with information in the Flexible Seating Guest section no longer modifiable. The host association information is presented along with a button to Release Association.

Adva	anced:	User	Modify				
		earspan user					
0	К	Cancel	Apply Delete				
		Enterprise	ciearspanlab Ciearspan LAB				
			sales organization - Sales Organization				
		User	Sales, User2 (6063338902@clearspanlab.com)				
		Service	Flexible Seating Guest				
_							
User	Optional	Phones	Announcements Flexible Seating Guest				
			(Close Tab) (Pin Tab) (Close Other Tabs)				
	xible Seatin						
F	exible Seatin	ng Guest allo	ws a user to associate their device profile with a flexible seating host.				
	Flexible Se	eating Guest	10 o 10				
	Asso	ociation Limit	Limit Association to 12 (must be within Host Association Limit of 24 hours)				
	Unlock Pho	ne PIN Code					
	PI	hone Device	MitelDECT6xxDMS-6063338902 (Group) 👻				
		Line / Port	6063338902 FlexSeating Hours @ clearspaniab.com +				
	Associated	Host					
		Name	Elexi Seating 1				
	Flexible Sea	ating Host ID	6063338921@clearspanlab.com				
	Host Asso	ociation Limit	t 24 Hours				
	Asso	ciation Time	Not Started				
	Associat	tion Duration					
	Asso	ociation Limit	t 12 Hours				
			Release Association				

Figure 107: Advanced: User Modify – Flexible Seating Guest Tab with Host Association

- **3.** To start the association, click **Apply** or **OK** to reboot the host phone, which then loads a new configuration file matching the guest user's device configuration.
- **4.** After the new file is loaded, the host phone functions like the user's primary phone, including all the key assignments and functions of the user's primary phone device. Calls placed to the user's extension are presented to both the user's device and the host phone, and calls can be placed from the host phone.

Associating with a Flexible Seating Phone using the Voice Portal

Guests can associate with a host phone using the voice portal following these steps.

- 1. Guests use the host phone to call into their personal voice portal using their mailbox ID and passcode.
- 2. After logging into their personal voice portal, guest users access the Flexible Seating menu, choose to associate with the host, and enter the Unlock Phone PIN Code if one was configured.
- 3. The phone reboots and loads a new configuration file matching the guest user's device configuration. While a guest is associated with it, the host phone functions like the user's primary phone, including all the key assignments and functions of the user's primary phone device. While the guest is logged onto the host phone, both the primary device and the host phone are functional and capable of making and receiving calls.
- 4. To release the association with the host phone, guests use the host phone to call their personal voice portal, access the Flexible Seating menu, and choose to unassociate from the host phone.

Unassociating a Flexible Seating Guest

The Flexible Seating association remains in effect until one of the following occurs:

- Release Association is selected on the Flexible Seating Guest tab
- The Association Limit for the guest expires
- The host phone is used to call the voice portal and make menu selections to unassociate
- Force Release Association is selected on the Guest Association tab for the host

When the Flexible Seating association is released, the phone reboots and loads the Flexible Seating host configuration. When no guest is associated with it, the host phone can only make emergency calls or calls into the voice portal.

Hoteling Guest

Hoteling Guest allows users to associate their configuration with a Hoteling Host user. This allows the guest user to use the host's phone device along with the guest user's configuration. This is useful for transient employees.



Note: The Hoteling Host and Hoteling Guest services must be assigned to the user on Clearspan. These are two separate services and should be assigned accordingly.

- 1. From the main menu, select Provisioning and then Users. The Users page opens.
- 2. Select the Enterprise and Group from the drop-down list, if necessary.
- 3. Click **Search** to display the users or enter search parameters to filter your search.
- 4. Click on the **Edit** link at the end of the row or click anywhere in the row of the user who will be the Hoteling Guest. The Advanced: User Modify page opens.
- 5. Select Hoteling Guest from the Service drop-down list.
- 6. Click On to enable this user as a Hoteling Guest.
- 7. Choose the Association Limit. The default is 12 hours.
- 8. Search for the Hoteling Host. Choose the host from the list of Available Hosts.
- 9. Click on the Associate Host button. The association is made.
- **10.** Click **Apply**. The **Saved** indication is displayed over the OK button. The Advanced: User Modify page opens again with the **Guest** and **Host** association displayed.
- 11. Click OK. The Users page opens.

Advanced: User Modify Modify an existing Clearspan user.						
OK Cancel Apply Delete						
Enterprise: clearspanlab – Clearspan LAB Group: sales organization – Sales Organization User: Sales, User3 (6063338903@clearspanlab.com) Service: Hoteling Guest						
User Optional Phones Announcements Flexible Seating Guest Hoteling Guest						
(Close Tab) (Pin Tab) (Close Other Tabs						
Hoteling Guest: On Off Association Limit: Limit Association to 12 Hours						
Associated Host Search for and select a Hoteling Host. Then press 'Associate Host' to complete the association of the host with this guest.						
Host Search (All Users) Contains: Associate Host						
Available Hosts						

Figure 108: Advanced: User Modify – Hoteling Guest Tab

Hoteling Host

Hoteling Host allows one user to be designated as a Host user. Another user, who is assigned as a Hoteling Guest, can then be "associated" to the host user. When associated, the host user allows the guest user to use the host phone device along with the guest's configuration. If an association limit is not enabled, the guest user is allowed to associate with the host user indefinitely.

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Note: The Hoteling Host and Hoteling Guest services must be assigned to the user on Clearspan. These are two separate services and should be assigned accordingly.

- 1. From the main menu, select **Provisioning** and then **Users**. The Users page opens.
- 2. Select the Enterprise and Group from the drop-down list, if necessary.
- 3. Click Search to display the users or enter search parameters to filter your search.
- 4. Click on the **Edit** link at the end of the row or click anyhwere in the row of the user who will be the Hoteling Host. The Advanced: User Modify page opens.
- 5. Select Hoteling Host from the Service drop-down list.
- 6. Click On to enable this user as a Hoteling Host.
- 7. Choose the Association Limit. The default is 24 hours.
- 8. Set the Access Level to Enterprise or Group.
- 9. Click OK or Apply.

Advanced: User Modify						
Modify an existing Clearspan user.						
OK Cancel Apply Delete						
Enterprise: Bulk Provisioning Lab Val, Inc						
Group_G Group, Gewel						
User: LTest07, FTest07 (9722221007@labval.mitel.com)						
Service: Hoteling Host 👻						
User Optional Phones Announcements Hoteling Host						
(Close Tab) (Pin Tab) (Close Other Tabs						
Hoteling Host						
Hoteling Host allows a user to be designated as a host user. A user, who is assigned as a hoteling guest, can then be associated to the host user. When associated, the host user allows the guest user to use the host's phone device with the guest's configuration. If association limit is not enabled, the guest user is allowed to associate with the host user indefinitely.						
Hoteling Host. On Off						
Association Limit Reforce Association Limit of 24 Hours						
Access Level: Enterprise						
€ Globb						
Associated Guest						
Name: LTest02, FTest02						
Phone Number: 9722221002						
Location Dialing Code:						
Extension: 1002						
Association Time: 08/07/2020 10 52 55						
Association Duration: 00:00:11						
Force Release Association						

Figure 109: Advanced: User Modify – Hoteling Host Tab

To release the Hoteling association:

- 1. From the main menu, select Provisioning and then Users. The Users page opens.
- 2. Select the Enterprise and Group from the drop-down list, if necessary.
- 3. Click Search to display the users or enter search parameters to filter your search.
- 4. Click on the **Edit** link at the end of the row or click anywhere in the row of the user who is the Hoteling Guest. The Advanced: User Modify page opens.
- 5. Select Hoteling Guest from the Service drop-down list. The Hoteling Guest tab opens.
- 6. Click Force Release Association to release the Host/Guest association.

Associated Guest	
Name:	LTest02, FTest02
Phone Number:	9722221002
Location Dialing Code:	
Extension:	1002
Association Time:	08/07/2020 10:52:55
Association time.	08/07/2020 10.52.55
Association Duration:	00:00:11
	Force Release Association

Figure 110: Advanced: User Modify – Host and Guest Association

Hunt Group

A Hunt Group allows incoming calls to be rotated through a sub-group of users until a free line is found and the caller is connected.

- 1. From the main menu, select **Provisioning** and then **Users**. The Users page opens.
- 2. Select the Enterprise and Group from the drop-down list, if necessary.
- 3. Click **Search** to display the users or enter search parameters to filter your search.
- 4. Click on the **Edit** link at the end of the row or click anywhere in the row of the user that will be allowed to monitor other users' phone status. The Advanced: User Modify page opens.
- 5. Select Hunt Group from the Service drop-down list. The Hunt Group tab opens.
- 6. Select the groups in the **Available Hunt Groups** list that should include the user. You can use Shift+Click to select specific groups.
- 7. Click Add to add the user to the selected groups, or click Add All to add the user to all groups. Use **Remove** or **Remove** All to remove the user from lists.
- 8. Click OK or Apply.

Integrated IM&P

Integrated IM&P allows service providers to offer instant messaging, presence, buddy list, chat and telephony integration. IM&P is enabled by default for a new user when the service is assigned.

- 1. From the main menu, select **Provisioning** and then **Users**. The Users page opens.
- 2. Select the Enterprise and Group from the drop-down list, if necessary.
- 3. Click Search.
- 4. Click on the **Edit** link at the end of the row or click anywhere in the row of the user that will be allowed to monitor other users' phone status. The Advanced: User Modify page opens.
- 5. Select Integrated IM&P from the Service drop-down list. The Integrated IM&P tab opens.
- 6. Select On to enable IM&P services for the user.
- 7. Select the Regenerate IM&P Password check box to create a new IM&P password.
- 8. Click OK or Apply.

Music On Hold

The Music On Hold tab allows you to specify settings for playing music during the calls that are holding or parked on the user's phone.

- 1. From the main menu, select **Provisioning** and then **Users**. The Users page opens.
- 2. Select the Enterprise and Group from the drop-down list, if necessary.
- 3. Click **Search** to display the users or enter search parameters to filter your search.
- **4.** Click on the **Edit** link at the end of the row or click anywhere in the row of the user for whom you want to configure Music On Hold settings. The Advanced: User Modify page opens.
- 5. Select Music On Hold from the Service drop-down list.

- 6. Select a **Music On Hold Profile**, if a profile has been created and you want to specify those settings for this user.
- 7. Select the Enable Music On Hold box to enable music on hold for this user.
- 8. Select the Music Source for this feature. Group uses the music selected for the Group. Custom Announcement allows you to select different music for this user. If Music Source is set to Custom Announcement, specify an Audio Announcement or Video Announcement by choosing a file from an Announcement Repository. To load a new announcement file, use the Announcements tab.
- **9.** To configure the user's music on hold to be different for internal and external calls, check the **Use Alternate Source** box and configure the Internal Calls Settings.

Priority Alert

Priority Alert allows you to make a user's phone ring with a different ring based on pre-defined criteria. Use this service if you want to distinguish when a specific person calls such as a manager or spouse, or when a call is from inside or outside the user's group. The criteria for each Priority Alert entry can be a list of up to 12 phone numbers or digit patterns, a specified time schedule, and a specified holiday schedule. All criteria (phone number, day of week, and time of day) for an entry must be true for the phone to ring with a different tone.

- 1. From the main menu, select **Provisioning** and then **Users**. The Users page opens.
- 2. Select the Enterprise and Group from the drop-down list, if necessary.
- 3. Click Search to display the users or enter search parameters to filter your search.
- 4. Click on the **Edit** link at the end of the row or click anywhere in the row of the user who will get priority alerts. The Advanced: User Modify page opens.
- Select Priority Alert from the Service drop-down list. Click Add Priority Alert to create a new priority alert, or click Edit in the Priority Alert table to modify or delete a priority alert. The Priority Alert table displays the Calls From and Calls To columns.

The User: Priority Alert page opens as shown in the following example.

User: Priority Aler Add a new priority alert entry. Sper phone numbers. If you need more press OK or Apply on the subsequ	ifly the time schedule and/or holiday schedule you would like a priority alert to occur. You can have the priority alerting occur for all external calls or only for calls from the specified than 12 numbers or more distinct time or holiday periods, you can create multiple priority alert entries. "Pressing OK retains but does not save entered changes. To save the changes,
OK* Cancel	
	clearspaniab – Clearspan LAB
	sales organization – Sales Organization Sales, User3 (6063338903@clearspanlab.com)
Priority Alert	
* Name / Description:	
Priority Alert:	
Time Schedule:	Every Day All Day
Holiday Schedule:	None 💌
Calls From Calls using Priority Alert:	All External Calls Calls from the following Phone Numbers Private Numbers Unavailable Numbers: Specific Phone Numbers:: (wildcard characters: ? for any digit; trailing * for multiple digits)
Calls To	
Available C Primary (606333 Alternate 1 (6063 Alternate 2 (6063 Alternate 3 (6063 Alternate 4 (6063)	33909/ 5123) 33806) Add > 33909)

Figure 111: Priority Alert Setup Page

- 6. Enter a Name/Description for the alert.
- 7. Click On for Priority Alert.
- 8. Specify the Time Schedule and/or Holiday Schedule for which to provide priority alerts.
- 9. Choose to provide alerts for All External Calls or calls from specific numbers. If you specify Calls from the following Phone Numbers, you can choose calls from Private Numbers and/or calls from Unavailable Numbers. You can also enter Specific Phone Numbers or number patterns using wildcard characters.
- 10. Choose the numbers from the **Available Call To Numbers** list in the **Calls To** section, and click **Add** to use the numbers for the Priority Alert.
- 11. Click OK*. The Priority Alert is added or changed.
- 12. Click OK or Apply again on the Advanced: User Modify page.

Privacy

Privacy allows you to exclude a user from Directory listings, Auto Attendant extension and/or name dialing, and Phone Status monitoring. You can also select the users who are allowed to monitor someone's phone status.



Note: Privacy is a service that must be assigned to the user on Clearspan.

- 1. From the main menu, select **Provisioning** and then **Users**. The Users page opens.
- 2. Select the Enterprise and Group from the drop-down list, if necessary.
- 3. Click Search to display the users or enter search parameters to filter your search.
- 4. Click on the **Edit** link at the end of the row or click anywhere in the row of the user for which to enable privacy. The Advanced: User Modify page opens.
- 5. Select **Privacy** from the **Service** drop-down list.

Advanced: Modify an existing C	: User Moo	lify					
ОК	Cancel A	pply Delete					
	Group: sale User: Sale	rspanlab Clearspan I s organization Sales s, User3 (6063338903 /acy	Organization				
User Optional	Phones Annou	ncements Privacy					
						(Close Tab) (Pin	Tab) (Close Other Tabs)
your phone st	tatus. These selecte rivacy Enable:	d users can view your p Enable Directory Priva	hone status even if you enable ph cy Extension Dialing Privacy Name Dialing Privacy		Phone Status monitoring. You can	also select the users who are allow	ad to monitor
Users Authorized	d to Monitor						
Select the use	ers authorized to me	nitor the phone status	vhen Phone Status Privacy is enal	oled.			
User Searc	h: Search						
(All Users)	🔹 Contains: 🤟						
	Availab	le Users			Users Authorized to Monite	or	
			Add > Remove <			^	

Figure 112: Advanced: User Modify – Privacy Tab

- 6. Select the types of Privacy that you want to enable. You can select **Enable Directory Privacy**, **Enable Auto Attendant Extension Dialing Privacy**, **Enable Auto Attendant Name Dialing Privacy**, or **Enable Phone Status Privacy** to exclude this user from those features.
- 7. Click **Search** to display all users, or enter parameters to narrow the search of Available Users, if you want to allow certain users to monitor the phone status of this user.
- Select the users authorized to monitor the phone status when Privacy is enabled. Click Add to add specific users to the list, or click Add All to add all users to the list. Use Remove or Remove All to remove users from the list. Use Move Up or Move Down to reorder the list.
- 9. Click OK or Apply.

Sequential Ring

Sequential Ring allows sequential ringing on multiple phones when calls are received. Sequential Ring allows you to add up to five locations in addition to the base location for a specified number of rings. The locations can either be a phone number or a SIP-URI. The sequential ring feature applies to calls matching your pre-defined criteria. The criteria for each Sequential Ring entry can list up to twelve phone numbers or digit patterns, a specified time schedule, and a specified holiday schedule. All criteria for an entry must be satisfied for the call to enter a sequential ring (for example: phone number, time). If the criteria do not match, the call continues as if this service was not turned on.

- 1. From the main menu, select Provisioning and then Users. The Users page opens.
- 2. Select the Enterprise and Group from the drop-down list, if necessary.
- 3. Click Search .
- 4. Click on the **Edit** link at the end of the row or click anywhere in the row of the user for which you want to set up the Sequential Ring service. The **Advanced: User Modify** page appears.
- 5. Select **Sequential Ring** from the **Service** drop-down list. The **Sequential Ring** tab opens as shown in the following example:

Advanced Modify an existing C							
ОК	Cancel	Apply	Delete				
	Enterpris Grou Usi Servio	ip: sales organizatio er: Sales, User3 (60	on – Sales Organization 063338903@clearspanl				
User Optional	Phones	Announcements	Sequential Ring				
Sequentia		_				(Clos	se Tab) (Pin Tab) (Close Other Tabs)
applies to cal phone. The c	lls matching criteria for e	j your pre-defined crit ach Sequential Ring iter Sequential Ring	eria. Use this service to entry can be a list of up (phone number and day occation first f rings for Base Location nue the search process	ning calls from your ma to 12 phone numbers of of week and time of da n: 3 (This setti if the base location is b	anager, a family member, or an i r digit patterns, a specified time ry). If the criteria do not match, t ng also affects Call Forward Rin usy.	gs. The 5 locations can be either a phone numb mortant customer on your cell phone, alternate schedule, and a specified holiday schedule. All he call continues as if this service was not turner gs Before Forwarding and Voice Mail Greetings	business phone, or home criteria for an entry must be d on.
Enable caller to skip search process. Assumes forwarding or messaging is enabled. Location Phone Number / SIP-URI Number of rings Answer confirmation required							
					3 -		
		1			3 -		
		2			3 -		
		4			3 🗸		
		5			3 👻		
Sequential Ring Criteria: Add Sequential Ring Criteria							
				Seq	uential Ring Criteria		
Active	\$	Name / Description	\$	Ring Sequentially 🕹	Calls From 💠		Edit
No entries exist.							
					- End of Entries -		

Figure 113: Advanced: User Modify Page – Sequential Ring Tab

- 6. The Use Base Location first option is selected by default, uncheck the Use Base Location first checkbox to disable the option.
- 7. Select the number of rings for base location.

- 8. The option to continue the search process if the base location is busy is selected by default, uncheck the **Continue the search process if the base location is busy** checkbox to disable the option.
- **9.** Enter the Phone Number/SIP-URI, select the number of rings and click the **Answer confirmation required** checkbox to receive an answer confirmation.
- **10.** Click Add Sequential Ring Criteria to add a new Sequential ring entry, the User: Sequential Ring Add page appears.

User: Sequential Add a new sequential ring entry. S numbers call. If you need more that press OK or Apply on the subsequ	pecify the time schedule and/or holiday schedule you would like calls sequentially rung. Also, you can have the call sequentially rung when only the specified numbers call or all in 12 numbers or more distinct time or holiday periods, you can create multiple sequential ring entries. *Pressing OK retains but does not save entered changes. To save the changes,
OK* Cancel	
	clearspanlab Clearspan LAB sales organization Sales Organization Sales, User3 (6063338903@clearspanlab.com)
Sequential Ring	
* Name / Description:	
Sequential Ring:	Use sequential ring Do not use sequential ring
Time Schedule:	Every Day All Day
Holiday Schedule:	None •
Calls From	
Sequential Ring:	All Calls (from any phone number) Calls from the following Phone Numbers Private Numbers Unavailable Numbers: Specific Phone Numbers: (wildcard characters: ? for any digit; trailing * for multiple digits) [

Figure 114: User: Sequential Ring Add

- Enter the Name or Description of the criteria, select the option to Use sequential ring, or Do not use sequential ring.
- **b.** Select the Time Schedule and Holiday Schedule.
- c. Select the option to receive a sequential ring from All Calls (from any phone number) or Calls from the following Phone Numbers and enter up to 12 phone numbers or digit patterns.
- **d.** Select **Private Numbers** or **Unavailable Numbers** or both, to receive calls from private and unavailable numbers.
- e. Click OK.
- **11.** Click any row in the **Sequential Ring Criteria table** to modify an existing sequential ring entry. The **User: Sequential Ring Modify** page opens.
- 12. Click OK or Apply.

Simultaneous Ring

Simultaneous Ring service allows simultaneous ringing on multiple phones when calls are received. Simultaneous Ring allows you to add up to 10 phone numbers or SIP-URI addresses to ring simultaneously, in addition to your primary phone, when you receive a call.

If the Simultaneous Ring criteria does not match, the call continues without simultaneous ring.

- 1. From the main menu, select **Provisioning** and then **Users**. The **Users** page opens.
- 2. Select the Enterprise and Group from the drop-down list, if necessary.
- 3. Click **Search** to display the users or enter search parameters to filter your search.
- 4. Click on the **Edit** link at the end of the row or click anywhere in the row of the user for which you want to set up the Simultaneous Ring service. The **Advanced: User Modify** page appears.
- 5. Select Simultaneous Ring from the Service drop-down list. The Simultaneous Ring tab opens as shown in the following example:

Advanced: User Modif Modify an existing Clearspan user.	fy				
OK Cancel Appl	y Delete				
Group: sales o User: Sales,	oanlab – Clearspan LAB organization – Sales Organization User3 (6063338903@clearspanlab.co	(mc			
User Optional Phones Announce	ements Simultaneous Ring				
Simultaneous Ring				(Close Ta	ab) (Pin Tab) (Close Other Tabs)
not at your phone but you would like entry can be a list of up to 12 phone Ring (phone number and day of wee picks up before your office voice me: Simultaneous Ring: On	your cell phone to ring when you get numbers or digit patterns, a specified ek and time of day). If the criteria do n ssaging picks up, your voice mails co	a call. You can also turn off a time schedule, and a specif of match, the call continues a uld be on your cell phone me	simultaneous ring when you ied holiday schedule. All crit as if this service was not tur	ary phone when you receive a call. This featur are at your desk on a call. The criteria for ace teria for an entry must be satisfied for the call ned on. Warning: if your cell phone or other ph	ch Simultaneous Ring to enter Simultaneous
Answe	er confirmation Phone Number / Sed	SIP-URI	Answer confirmation required	Phone Number / SIP-URI	
Simultaneous Ring Criteria: Add	Simultaneous Ring Criteria				
		Simultaneous I	Ring Criteria		
Active 💠 Name / Desc	cription 💠	Ring Simultaneously \$	From 💠		Edit
No entries exist.					

Figure 115: Advanced: User Modify Page – Simultaneous Ring Tab

- 6. Select **On** to enable the Simultaneous Ring service.
- 7. Select the **Do not ring my Simultaneous Ring Numbers if I'm already on a call** checkbox if you do not want to ring the Simultaneous Ring numbers when already on a call.
- **8.** Enter the Phone Number or SIP-URIs. You can configure up to 10 phone numbers or SIP-URI addresses.
- **9.** Click Add Simultaneous Ring Criteria to add a new Simultaneous ring entry, the User: Simultaneous Ring Add page appears.

OK* Cancel Enterprise: clearspanLAB Group: sales organization Sales Organization User: Sales, User3 (6063338903@clearspanlab.com) Simultaneous Ring * Name / Description: Simultaneous Ring: • Use simultaneous ring O not use simultaneous ring • Do not use simultaneous ring Holiday Schedule: Every Day All Day • Holiday Schedule: None • Simultaneous Ring: • All Calls (from any phone number) • Calls From Calls from the following Phone Numbers • Private Numbers • Unavailable Numbers • Unavailable Numbers • Unavailable Numbers
Group: sales organization – Sales Organization User: Sales, User3 (6063338903@clearspaniab.com) Simultaneous Ring * Name / Description: Simultaneous Ring: © Use simultaneous ring © Do not use simultaneous ring Time Schedule: Every Day All Day • Holiday Schedule: None • Simultaneous Ring: © All Calls (from any phone number) © Calls from the following Phone Numbers © Calls from the following Phone Numbers © Private Numbers
Name / Description: Simultaneous Ring:
O not use simultaneous ring Time Schedule: Every Day All Day Holiday Schedule: None Calls From Simultaneous Ring: All Calls (from any phone number) Calls from the following Phone Numbers Private Numbers Private Numbers
Holiday Schedule: None Calls From Simultaneous Ring: All Calls (from any phone number) Calls from the following Phone Numbers Private Numbers Private Numbers
Simultaneous Ring: All Calls (from any phone number) Calls from the following Phone Numbers Private Numbers
Calls from the following Phone Numbers Private Numbers
Specific Phone Numbers: (wildcard characters: ? for any digit; trailing * for multiple digits) Image: Comparison of the system of th

Figure 116: User: Simultaneous Ring Add

- **a.** Enter the Name or Description of the criteria, select the option to **Use simultaneous ring**, or **Do not use simultaneous ring**.
- **b.** Select the Time Schedule and Holiday Schedule.
- c. Select the option to receive a simultaneous ring from All Calls (from any phone number) or Calls from the following Phone Numbers and enter up to 12 phone numbers or digit patterns.
- **d.** Select **Private Numbers** or **Unavailable Numbers** or both, to receive calls from private and unavailable numbers.
- e. Click OK.
- **10.** Click any row in the **Simultaneous Ring Criteria table** to modify an existing simultaneous ring entry. The **User: Simultaneous Ring Modify** page opens.

Speed Dial 8

E2

Speed Dial 8 allows you to set up to eight speed dial numbers (2 through 9) that can be called with the push of a button. Users can press the speed code on the touchpad of the phone to call the number.

Note: Speed Dial 8 is a service that must be assigned to the user on Clearspan.

- 1. From the main menu, select **Provisioning** and then **Users**. The Users page opens.\
- 2. Select the Enterprise and Group from the drop-down list, if necessary.
- 3. Click **Search** to display the users or enter search parameters to filter your search.

- 4. Click on the **Edit** link at the end of the row or click anywhere in the row of the user for which to configure Speed Dial 8. The Advanced: User Modify page opens.
- 5. Choose **Speed Dial 8** from the **Service** drop-down list. The Speed Dial 8 tab opens.
- 6. If you want to assign a predefined Speed Dial 8 List to the user, select it from the **Initialize List** Using drop-down box, and click **Initialize List**. Initializing a predefined list overwrites any existing Speed Code entries.
- 7. If you want to assign or edit a specific Speed Code entry, enter or change the **Phone Number** / SIP-URI and a Name/Description. Enter a phone number as you would normally dial it.
- 8. Click OK or Apply.

Speed Dial 100

Speed Dial 100 allows you to set up to 100 speed dial phone numbers or SIP-URI addresses that can be called with the push of a few buttons. Users can enter the number for a Speed Dial 100 entry as they would normally dial it and then just press the speed code prefix and speed code on the touch pad to call it.



Note: Speed Dial 100 is a service that must be assigned to the user on Clearspan.

The default Dialing Prefix is # but can be changed. Be careful not to assign a #nn code that conflicts with a system feature access code.

Adding Speed Dial 100 Entries

- 1. From the main menu, select **Provisioning** and then **Users**. The Users page opens.
- 2. Select the Enterprise and Group from the drop-down list, if necessary.
- 3. Click **Search** to display the users or enter search parameters to filter your search.
- 4. Click on the **Edit** link at the end of the row or click anywhere in the row of the user for which to configure Speed Dial 100. The Advanced: User Modify page opens.
- 5. Choose Speed Dial 100 from the Service drop-down list. The Speed Dial 100 tab opens.
- If you want to assign a predefined Speed Dial 100 List to the user, select it from the Initialize List Using drop-down box, and click Initialize List. Initializing a predefined list overwrites any existing Speed Code entries.
- 7. If you want to assign a specific Speed Code entry, click the **Add Speed Dial 100** button. The User: Speed Dial 100 Add page displays as in the following example.

User: Speed Dial 100 Add Add a new speed dial. "Pressing OK retains but does not save entered changes. To save the changes, press OK or Apply on the subsequent page.
OK* Cancel
Enterprise: clearspanlab – Clearspan LAB Group: sales organization – Sales Organization User: Sales, User3 (6063338903@clearspanlab.com)
6 4 Dist 400
Speed Dial 100 Speed Code 100: 00
Name / Description:
* Phone Number / SIP-URI:

Figure 117: User: Speed Dial 100 Add Dialog Box

- 8. Choose the Speed Code 100 number from the drop-down list.
- 9. Enter the Name/Description.
- **10.** Enter the Speed Dial **Phone Number/SIP-URI**. Enter a phone number as you would normally dial it.
- 11. Click OK*. The Speed Dial 100 tab opens again with the new speed dial entry.
- 12. Click OK or Apply again.

Editing or Deleting Speed Dial 100 Entries

- 1. From the main menu, select **Provisioning** and then **Users**. The Users page opens.
- 2. Select the Enterprise and Group from the drop-down list, if necessary.
- 3. Click **Search** to display the users or enter search parameters to filter your search.
- **4.** Click on the **Edit** link at the end of the row or click anywhere in the row of the user for which to configure Speed Dial 100. The Advanced: User Modify page opens.
- 5. Choose Speed Dial 100 from the Service drop-down list. The Speed Dial 100 tab opens.
- 6. Click on the Edit link at the end of the row or click anywhere in the row of the Speed Dial 100 entry to modify.
- 7. Make any changes, or click **Delete*** to delete the entry.
- 8. Click OK* to return to the Speed Dial 100 tab.
- 9. Click OK or Apply again.

Voice Mail

The Voice Mail tab allows modification of Voice Mail parameters. If a user has "No Voice Mail" assigned, you can add voice mail on this page, activate it, and configure it accordingly.

- 1. From the main menu, select **Provisioning** and then **Users**. The Users page opens.
- 2. Select the Enterprise and Group from the drop-down list, if necessary.
- 3. Click **Search** to display the users or enter search parameters to filter your search.

- 4. Click on the Edit link at the end of the row or click anywhere in the row of the user for which to configure Voice Mail.
- 5. Select Voice Mail from the Service drop-down list.

Advanced: User M Modify an existing Clearspan user.	lodify
OK Cancel	Apply Delete
Group:	clearspanlab Clearspan LAB sales organization Sales Organization Sales, User3 (6063338903@clearspanlab.com)
User Optional Phones An	Inouncements Voice Mail
	(Close Tab) (Pin Tab) (C
Voice Mail	nd management for solls that are not any under this a second damage of sizes or for burns calls
voice Mail allows you to reco	rd messages for calls that are not answered within a specified number of rings or for busy calls.
Voice Mail:	Voice Mail - No E-mail Notification - Delete Voice Mailbox Reset Voice Mailbox
Voice Mail Active:	Active Disabled
Calls sent to Voice Mail:	All Calls
	Busy Calls
	Vo Answer Calls
	Out-of-Zone Calls
Reset Voice Portal Passcode:	(create a numeric passcode of 4 to 8 digits)
Confirm Portal Passcode:	
Voice Mail Server:	Clearspan: Group Server
Voice Mail Management	
Arriving Voice Mail Action:	Use Unified Messaging 👻
	Use Phone Message Waiting Indicator (MWI)
	Send Notification to E-mail Address:
	E-mail Carbon Copy to E-mail Address:
	WARNING: E-mail copies of Voice Mail may not be sent over secure E-mail.
Caller Options:	Transfer on '0' to Phone Number:
After Playing Greeting:	Record a Message 👻

Figure 118: Advanced: User Modify Page – Voice Mail Tab

- 6. If Voice Mail was previously enabled and saved, Delete Voice Mailbox and Reset Voice Mailbox buttons appear. Delete Voice Mailbox removes the voice mail account and any associated greetings without deleting the user. Reset Voice Mailbox deletes and rebuilds the voice mail account and deletes any associated greetings to restore the Voice Mail Greetings settings to defaults. These buttons also appear on the User tab.
- 7. Click the Active radio button, if necessary.
- 8. Select the Calls Sent to Voice Mail options that you want to set for this user.
- 9. Enter the Voice Portal Passcode and Confirm Portal Passcode for a new user. You can Reset Voice Portal Passcode and Confirm Portal Passcode to reset the voice portal passcode.
- 10. Choose the Voice Mail Server from the drop-down list. It should be the Clearspan: Group Server.
- **11.** Check the **Corrective Action** check box under the **Voice Mail Management** section, to reconcile Clearspan portal with compliance issue.



Note: The **Corrective Action** checkbox does not appear, if the voicemail fields are already compliant.

- 12. Choose the Arriving Voice Mail Action options.
- **13.** For **Caller Options**, select whether pressing 0 when voice mail is reached will transfer the caller to another phone number that you specify.
- 14. Enter the E-mail address, User ID and Select the Full Mailbox Limit in the Group Mail Server options. Reset Server Password and Confirm Server Password will be displayed as per the Voice Mail Account Settings.
- 15. Click OK or Apply.

Voice Mail Distribution Lists

Voice Mail Distribution Lists allow you to create lists of numbers where you can send voice messages to many users at one time.

Adding Entries to Voice Mail Distribution Lists

- 1. From the main menu, select **Provisioning** and then **Users**. The Users page opens.
- 2. Select the Enterprise and Group from the drop-down list, if necessary.
- 3. Click **Search** to display the users or enter search parameters to filter your search.
- 4. Click on the **Edit** link at the end of the row or click anywhere in the row of the user for which to configure Voice Mail Distribution Lists.
- 5. Select Voice Mail Distribution Lists from the Service drop-down list. The Voice Mail Distribution Lists tab opens.
- 6. Click the Add Distribution List button.
- 7. Select the Distribution List Number from the drop-down list.
- 8. Enter a list Description.
- Enter the Phone Number/SIP-URI entries for the list, clicking the Add button each time. The numbers display in the Phone Number/SIP-URIs table.
- **10.** Click **OK**. The list is saved.
- **11.** Click **OK** or **Apply** again.

	(
Advanced: User Modify Modify an existing Clearspan user.	
OK Cancel Apply Delete	
Enterprise: clearspanlab – Clearspan LAB Group: sales organization – Sales Organization User: Sales, User3 (6063338903@clearspanlab.com) Service: Voice Mail Distribution Lists	
User Optional Phones Announcements Voice Mail Distribution Lists	
(Close Tab) (Pin Tab) (Close Other Tab) Voice Mail Distribution Lists	s)
Voice Mail Distribution Lists allows you to create lists of numbers where you can send voice messages to in bulk. Voice Mail Distribution Lists: Add Distribution List	
Voice Mail Distribution Lists	
Distribution List Number Description 🗘 Edit	
No distribution lists exist.	
- End of Distribution Lists -	

Figure 119: Voice Mail Distribution Lists

Removing an Entry in a Voice Mail Distribution List

- 1. From the main menu, select **Provisioning** and then **Users**. The Users page opens.
- 2. Select the Enterprise and Group from the drop-down list, if necessary.
- 3. Click Search to display the users or enter search parameters to filter your search.
- 4. Click on the **Edit** link at the end of the row or click anywhere in the row of the user for which to configure Voice Mail Distribution Lists.
- 5. Select **Voice Mail Distribution Lists** from the **Service** drop-down list. The Voice Mail Distribution Lists tab opens.
- 6. Click the Edit link on the row of the distribution list you want to edit. The list opens.
- 7. Select the box beside the numbers to remove.
- 8. Click **Remove**. The numbers are removed.
- 9. Click OK.
- 10. Click OK or Apply again.

Voice Mail Greetings

The Voice Mail Greetings tab allows modification of a user's Voice Mail Busy and No Answer greetings.

- 1. From the main menu, select **Provisioning** and then **Users**. The Users page opens.
- 2. Select the Enterprise and Group from the drop-down list, if necessary.
- 3. Click Search to display the users or enter search parameters to filter your search.
- 4. Click on the **Edit** link at the end of the row or click anywhere in the row of the user for which to configure Voice Mail.
- 5. Select Voice Mail Greetings from the Service drop-down list.

OK Cancel Apply Delete Enterprise: clearspanlab Clearspan LAB
Enterorise: clearspanlab – Clearspan LAB
Group: sales organization — Sales Organization User: Sales, User3 (6063338903@clearspanlab.com) Service: Voice Mail Greetings •
User Optional Phones Announcements Voice Mail Greetings
(Ciose Tab
Busy Greeting Settings
Greeting Source: System Greeting
Personal Audio Greeting: (None)
Personal Video Greeting: (None)
No Answer Greeting Settings
Number of Rings: 3 (This setting also affects Call Forward Rings Before Forwarding and Sequential Ring Number of Rings for Base Location)
No Answer Greeting Type: Use Normal No Answer Greeting •
Extended Away Settings
Audio Greeting: (None)
Video Greeting: (None) -
Disable Message Deposit: 🛛 📝
Normal No Answer Settings
Greeting Source: System Greeting
Unavailable Greeting Settings
Audio Greeting: (None) -
Video Greeting: (None) 👻
Alternate No Answer Greeting #1
Name:

Figure 120: Advanced: User Modify Page – Voice Mail Greetings Tab

- 6. Set Greeting Source to System Greeting to use the standard voice mail greeting played for callers when this user's phone line is busy, or set it to **Personal Greeting** if you want to select a file from the user's Announcement Repository. If you choose Personal Greeting, select the **Personal Audio Greeting** or **Personal Video Greeting** file to use.
- 7. In the No Answer Greeting Settings section, set the **Number of Rings** before callers are sent to Voice Mail, and select the **No Answer Greeting Type** to either Use **Extended Away Greeting** or **Use Normal No Answer Greeting**, as configured on this page.
- 8. To configure Extended Away Greeting Settings, select an Audio Greeting or Video Greeting file from the user's Announcement Repository. Select the **Disable Message Deposit** check box to prevent callers from leaving a Voice Mail message.
- **9.** To configure Normal No Answer Greeting Settings, set the **Greeting Source** to the standard **System Greeting**, or select one of the alternate greetings configured on this page.
- **10.** To configure Unavailable Greeting Settings, select an **Audio Greeting** or **Video Greeting** file from the user's Announcement Repository.
- **11.** To configure an Alternate No Answer Greeting, select an **Audio Greeting** or **Video Greeting** file from the user's Announcement Repository, and enter a Name that describes the greeting.
- 12. Click OK or Apply.

User Settings

You can view or modify user settings at the System, Enterprise, and Group level.

- 1. From the main menu, select **Provisioning** and then **Users**.
- 2. Click General Settings and then User Settings. The User Settings page opens.
- 3. Set the Account ID under System Settings. If it is set to **Required**, the administrator must enter an Account ID when creating or modifying a user. By default, the **Voicemail Email** is set to **Enabled**.
- 4. Set the Account ID under Enterprise Settings. It can be Required, Not Required, or Use System Setting, which uses the system setting specified on this screen. This setting appears only when an Enterprise is specified. By default, the Voicemail Email is set to Use System Setting.
- 5. Set the Integrated IM&P under Enterprise Settings. Setting this to Use System Setting uses the configuration set for the system. If you set this to IM&P service domain, enter the service domain in the text field that appears. This setting appears only when an Enterprise is specified.
- 6. Select Manual from the Voicemail Acct Password dropdown list under Enterprise Settings to manually enter the password. By default, Voicemail Acct Password is set to Automatic.
- 7. Set the Account ID under Group Settings. It can be Required, Not Required, or Use Enterprise Setting, which uses the enterprise settings on this screen. This setting appears only when a Group is specified. By default, the Voicemail Email is set to Use Enterprise Setting.
- 8. Set the Integrated IM&P under Group Settings. Setting this to Use Enterprise Setting uses the enterprise settings on this screen, if you set this to IM&P service domain, enter the service domain in the text field that appears. This setting appears only when a Group is specified.



Note: When the **Voicemail Email** setting is **Enabled**, all the Users, Auto Attendants, and Hunt Groups Voicemail Email settings in the Enterprise/Group are disabled for Voicemail Email compliance and vice-versa.

Only SR administrators and above can edit the Voicemail Email settings.

- 9. Select Use Enterprise Setting/Manual/Automatic from the Voicemail Acct Password dropdown list under Group Settings for the password. By default, Voicemail Acct Password is set to Use Enterprise Settings.
- 10. Click OK.

New User E-mail Notification

After a new user is created, an optional e-mail goes out to the user containing instructions for setting up the new phone. The User Profile specifies whether or not the e-mail will be sent. A DA cannot change the content of this message but can view it.

- 1. From the main menu, select **Provisioning** and then **Users**.
- 2. Click General Settings and then New User E-mail Notification. The User General Settings: New User E-mail Notification page opens.
- 3. Click OK to exit General Settings.

User General Settings: New User E-mail Notification Display and modify the E-mail message that is sent to new users based on phone type. The E-mail notification typically provides instructions on phone setup.	
OK Cancel Apply Save As System-Wide Default	
Enterprise: Hawkins - Marty's Enterprise *	
Phone Manufacturer: (Mitel (Aastra) *	
New User E-mail Message:	
Enter or modify the 'From' address, 'Subject' line, and body of the E-mail message that is to be sent to new phone users. The subject line and message body can contain any of the substitution tags (identified by {} braces) listed at the bottom of the page. When the E-mail is sent, these tags are replaced by the appropriate user-specific information.	
The text between {CCDesktopStart} and {CCDesktopEnd} is sent only when the new user has a Clearspan Communicator - Desktop device configured. Similarly the text between {CSEngageDesktopStart} and {CSEngageDesktopEnd} is sent for a CS Engage - Desktop device, between {CCS4BStart} and {CCCS4BEnd} is sent for a Clearspan Communicator - S4B device, between {CSEngageMobileStart} and {CSEngageMobileEnd} is sent for a CS Engage - Mobile device, between {CCMobileStart} and {CCMobileEnd} is sent for a Clearspan Communicator - Mobile device, and between {CCTabletStart} and {CCTabletEnd} is sent for a Clearspan Communicator - Mobile device.	
Similarly, the (DMMACAddressStart) and (DMMACAddressEnd) tags surround text only sent when the user's phone device is configured using the device's MAC Address. The (DMCredentialsStart) and (DMCredentialsEnd) tags surround text only sent when the user's phone device is configured using the device's credentials (access User Name and Password). Reset to System-Wide Default Clear	
From: No-Reply@tb20ems1public.cslab.mitel.com	
Subject: Your New Mitel (Aastra) Phone	
Greetings {UserName}:	
Your organization has provided you with a new Mitel (Aastra) {PhoneModel} phone and the latest Unified Communications and messaging features.	
The following steps are required to install and activate your new phone:	
1) When you receive your phone, unpack the phone and follow the assembly instructions.	
2) The following link is to Mitel's online training/tutorials, which includes phone assembly, user training, unified messaging (voice mail) and other optional applications. Please choose the appropriate training which applies to your device. http://aastra.aastrausa.com/training-resource-portal	
3) Please complete the following steps to activate your phone:	

Figure 121: User General Settings: New User E-mail Notification

Deleting a User

You can delete a user after it has been created.

- 1. From the main menu, select **Provisioning** and then **Users**.
- 2. Click Search to obtain the list of users.
- 3. Click on the **Edit** link at the end of the row or click anywhere on the row of the user you want to delete. The User Modify page displays with a Delete button.
- 4. Click Delete.

E/

Note: If the Delete button does not appear, then you are not authorized to add or delete users.

- 5. Click **OK** in the confirmation dialog box.
- 6. If no devices are associated with the user, the user is deleted. If none of the associated devices can be deleted, only the user is deleted. All of the associated devices remain, with other users assigned.

An associated device CANNOT be deleted if:

• The device is a primary phone device of the user and that device is also a primary phone device of another user. In other words, if the primary device of this user either has no other users assigned or the only other users assigned use it as a Shared Call Appearance (SCA) and not as a primary device, the device can be deleted.

- The device is a Shared Call Appearance of this user and has any other users assigned. In other words, any SCA device of this user that has no other assigned users can be deleted.
- 7. If any of the devices associated with the user can be deleted, the User Delete page is displayed. Select either User or User and Associated Phone Devices from the Settings to Delete drop-box.

ancel Delete			
Group:	clearspanlab Clearspan LAB sales organization Sales Organization Sales, User3 (6063338903@clearspanlab.c	om)	
User Delete			
User:	Sales, User3 (6063338903@clearspanlab.c	xom)	
Settings to Delete:	User and Associated Phone Devices		
Select All Devices			
		Phone Devices	
Selected	Device Type 👌	Device Name	Туре
deleuteu			

Figure 122: User Delete Page

- When **User** is selected, only the user and any associated Clearspan Business Communicators/Clearspan Mobile devices are deleted. All the associated devices remain, with other users assigned.
- When User and Associated Phone Devices is selected:
- The user is deleted.
- The Associated Phones Devices such as the Primary Phone device, SCA Phone devices, and the Business Communicators/ Clearspan Mobile devices are displayed in the Phone Devices table. Select the Primary Phone Device check box and/or the SCA Phone Device checkbox to delete the associated phone device(s). The associated Business Communicators/Clearspan Mobile devices will not contain a check box.
- The user's primary phone device, if any, is deleted but ONLY if that device has no other assigned primary users. Note that the device is still deleted even if it has other users assigned as long as those users are assigned as a Shared Call Appearance (SCA); the other user will be removed (unassigned) before the device is deleted.
- Before deleting the user, you can always remove (unassign) any other users, including other primary users, from the user's primary device to allow the device to be deleted.
- Any devices that the user is assigned to as a Shared Call Appearance (SCA) are deleted but ONLY if that device has no other assigned users.
- Before deleting the user, you can always remove (unassign) any other users from any of the devices assigned to the user to allow the SCA devices to be deleted.
- Any Clearspan Communicator device/Clearspan Mobile device assigned to the user is deleted because Clearspan Communicators/Clearspan Mobile devices cannot have any other user assigned.
- In addition, any device that the administrator deleted by editing the device and pressing the "Delete Device" button will be deleted. The "Delete Device" button is available only when the

only other users on the device are SCAs (in other words, when no other user has the device as their primary device). Note that these devices are deleted independent of the "User Delete" page, which might not be displayed.

8. Click Delete on the User Delete page. The user and phone devices are deleted.

Deleting a user makes available any licenses that were allocated to the user.

Virtual Users

A Virtual User is a group service that has many of the characteristics of a user (for example, User Id, Name, Phone Number, and Extension). It can be assigned services just as a normal user can be assigned services. A Virtual User does not consume an OpEasy User License or Clearspan User License by means of its existence. However, if one or more user services are assigned to a Virtual User, a Clearspan User License will be consumed.

The Virtual User types include:

- Auto Attendant
- Clearspan Anywhere Portal
- Call Center
- Collaborate Bridge
- Find Me/Follow Me
- Flexible Seating Host
- Group Paging
- Hunt Group
- Instant Group Call
- Meet-Me Conference Bridge
- Route Point
- VoiceXML

Auto Attendants

The Auto Attendant is like a virtual receptionist. It automatically answers and directs incoming calls to your main business number with a personalized greeting 24 hours a day, 7 days a week. The Auto Attendant provides your callers with a menu of options which they select from to connect to the right person or department. The Auto Attendant page allows you to add or change this functionality for an enterprise or group.

Planning and Testing Auto Attendants

- 1. Map out your interactive menu structure.
- **2.** Configure a time schedule for your organization's business hours and a holiday schedule for your organization's holidays.
- 3. Configure the addresses for the phone numbers.
- 4. Create an Auto Attendant account for the main menu in your structure.
- 5. Set up the main menu and all submenus.
- **6.** Record custom messages using the voice portal or upload audio files using the web interface. If you enabled video support, also upload video files.

7. Call the Auto Attendant numbers to test your design.

🚫 Tip:

- Internal transfers require only an extension.
- First-level extension dialing and extension dialing at any time allow the user to dial an extension without having to select an option first.
- List the menu options in a predictable order.
- List the menu options that transfer to the operator last ("to reach the operator, press 0 or stay on the line"). Callers who do not press a key are transferred to the operator.

Adding a New Auto Attendant

2

- 1. Select Provisioning from the main menu, and then select Virtual Users and Auto Attendants.
- 2. Select the Enterprise and Group from the drop-down list, if necessary.
- 3. Click the Add button. The Auto Attendant tab displays by default.

Note: If the Add button does not appear, then you are not authorized to add or delete virtual users.

- **4.** If you select a service from the **Service** drop-down list, an additional Service Tab will appear. For example, if you select **Alternate Numbers**, the **Alternate Numbers** tab appears.
- 5. Enter a Name for the Auto Attendant.
- 6. Enter an Auto Attendant ID and domain.
- 7. Select the Auto Attendant Type, either Basic or Standard based on the license.
- 8. Select the **Department** for which to implement the Auto Attendant.
- 9. Select the Phone Number and/or Extension for which to implement the Auto Attendant.
- 10. Activated or Deactivated indicates the current status of the phone number selected. Change this setting if necessary. Select Activated (Recommended) if the phone will place and receive calls from outside the system, or DeActivated if the calls will be internal only.
- **11.** Choose to **Enable Video Support** and **Confirm Portal Passcode**. This field appears only when the group has Auto Attendant Basic Video or Auto Attendant Standard service assigned.
- **12.** Enter the **Voice Portal Passcode** if Voice Mail is enabled for the Auto Attendant. The passcode must contain 4-8 digits as determined by the administrator.
- **13.** For **Calling Line ID**, enter the **Last Name**, **First Name**, and **Phone Number** for the Auto Attendant.
- 14. Select the Business Hours and Holiday Schedule to use for the Auto Attendant.
- **15.** Select **Enterprise**, **Group**, or **Department** as the dialing option for **Extension Dialing Scope** and **Name Dialing Scope**. Use the name and extension dialing scope controls to specify whether your Auto Attendant can make direct calls to users in the same group, department, or enterprise.
- 16. Choose the LastName and FirstName order for Name Dialing Order. This setting determines whether callers can enter either the last name or first name of the person they want to reach, or only the last name.
- 17. Determine the features to enable for the Auto Attendant. Click the **Available Service(s)** in the list on the left, and click **Add**.

18. User Defined Fields – These fields are displayed only if the Enterprise User Fields are defined at the Enterprise level. To change the default value of the User Defined Fields, clear the Use Default check box and enter the value of the User Defined Field in the Value box.

You can click **OK** at this time to save the Auto Attendant, or you can enter information in the Optional, Menus, Announcements, and Voice Mail tabs. When you click OK, the Auto Attendant is saved.

Optional Tab

Click the Optional tab of the Auto Attendant Add page to view or change optional values such as Time Zone, Language information, and Aliases used to place and receive calls.

Menus Tab

- 1. Click on the **Menus** tab of the Auto Attendant Add page to view or change the menu selections, options, and key definitions for the Auto Attendant functionality.
- 2. Choose Business Hours Menu to configure the Menu Selection for business hours.
- 3. Select **Default Greeting** or choose a **Personal Greeting** for the **Greeting Selection**. The Personal Greeting choices come from the Auto Attendant's Announcement Repository or its Group's Announcement Repository.
- **4.** Check **Enable First-Level Extension Dialing** if you want to enable that feature. When using First-level Extension dialing, you are not required to configure a key for extension dialing.
- 5. In the Menu Key Definitions section, configure a **Description**, an **Action**, and the **Action Data** for each key that you want to assign to the Auto Attendant feature.
- 6. Set **Menu Selection** to **After Hours Menu** if you want to configure separate options for non-business hours.
- 7. Set **Menu Selection** to **Holiday Menu** if you want to configure separate options for holiday hours.
- 8. Click OK.

Submenus Tab

- Click on the Submenus tab of the Auto Attendant Add page to view or change the submenus for the Auto Attendant functionality. This tab opens when the Auto Attendant Type is set to Standard.
- 2. Search for a Submenu to edit, or click Add Submenu.
- 3. Enter the Submenu ID.
- 4. Select **Default Greeting** or choose a **Personal Greeting** for the **Greeting Selection**. The Personal Greeting choices come from the Auto Attendant's Announcement Repository or its Group's Announcement Repository.
- 5. Select **Enable extension dialing at any time** if you want to enable that feature. When using extension dialing, you are not required to configure a key for extension dialing if you select this option.
- 6. In the Submenu Key Definitions section, configure a **Description**, an **Action**, and the **Action Data** for each key that you want to assign to the Auto Attendant feature.

7. Click OK.

Announcements Tab

OpEasy allows you to upload, delete, or configure audio or video announcement files to repositories. Announcements repositories are kept for Users, Auto Attendant and Hunt Group virtual users, and Groups. Once an announcement is saved to a repository, OpEasy allows you to assign it to Voice Mail Greetings, Auto Attendant menus, and Music On Hold. You can search, upload, rename, or delete announcements on a user's Announcements tab. You can also view announcement types, size, and usage. You can manage announcements when you create a new user or when modifying a user, as described in the section *Announcements*.

Voice Mail Tab

- 1. Select **Voice Mail** from the **Service** drop-down list on the Auto Attendant page to view or change the Voice Mail settings.
- 2. If Voice Mail was previously enabled and saved, Delete Voice Mailbox and Reset Voice Mailbox buttons appear. Delete Voice Mailbox removes the voice mail account and any associated greetings without deleting the Auto Attendant. Reset Voice Mailbox deletes and rebuilds the voice mail account and deletes any associated greetings to restore the Voice Mail Greetings settings to defaults.
- 3. Click the Active radio button, if necessary.
- 4. Select the Calls Sent to Voice Mail options that you want to set for the Auto Attendant.
- 5. Choose Voice Mail Server from the drop-down list. Select Clearspan: Group Server.
- 6. Choose Voice Mail Management settings to determine the Arriving Voice Mail Action options, Caller Options for dialing 0 to transfer, and the action to take After Playing Greeting.

CAUTION: E-mail copies of Voice Mail might not be sent over secure E-mail.

- 7. Enter the E-mail address, User ID and Select the Full Mailbox Limit in the Group Mail Server options. Server Password and Confirm Server Password will be displayed as per the Voice Mail Account Settings.
- 8. Click Apply, and then click OK.

Voice Mail Greetings Tab

- 1. Select **Voice Mail Greetings** from the **Service** drop-down list. The Voice Mail Greetings tab allows modification of an Auto Attendant's Voice Mail Busy and No Answer greetings.
- 2. Set Greeting Source to System Greeting to use the standard voice mail greeting played for callers when the Auto Attendant line is busy, or set it to **Personal Greeting** if you want to select a file from the Auto Attendant's individual or group Announcement Repository. If you choose Personal Greeting, select the **Personal Audio Greeting** or **Personal Video Greeting** file to use.
- 3. In the No Answer Greeting Settings section, select the No Answer Greeting Type as either Use Extended Away Greeting or Use Normal No Answer Greeting.

- 4. To configure Extended Away Greeting Settings, select an Audio Greeting or Video Greeting file from the Auto Attendant's individual or group Announcement Repository. Select the Disable Message Deposit checkbox to prevent callers from leaving a Voice Mail message.
- 5. To configure Normal No Answer Greeting Settings, set the **Greeting Source** to the standard **System Greeting**, or select one of the alternate greetings configured on this page.
- **6.** To configure Unavailable Greeting Settings, select an **Audio Greeting** or **Video Greeting** file from the Auto Attendant's individual or group Announcement Repository.
- 7. To configure an Alternate No Answer Greeting, select an **Audio Greeting** or **Video Greeting** file from the Auto Attendant's individual or group Announcement Repository, and enter a **Name** that describes the greeting.

Alternate Numbers Tab

- 1. Select Alternate Numbers from the Service drop-down list. The Alternate Numbers tab allows up to 10 additional phone numbers or extensions to be assigned in addition to your primary number and extension.
- 2. Select the phone number from the **Phone Number** drop-down list and add an extension if available.
- 3. Click the Activated check box to activate the alternate phone number or extension.
- 4. Click OK.

Configuring Hunt Groups

You can configure Hunt Groups. A Hunt Group allows incoming calls to be rotated through a sub-group of users until a free line is found and the caller is connected.

- 1. From the main menu, select **Provisioning** and then **Virtual Users**.
- 2. Select Hunt Groups.
- 3. Select the Enterprise and Group from the drop-down list, if necessary.
- 4. Search for a Hunt Group to edit, or click the Add button to create a new Hunt Group.



Note: If the Add button does not appear, then you are not authorized to add or delete virtual users.

Hunt Group Add		
Add a new hunt group.		
OK Cancel		
Enterprise: Group:	clearspanlab Clearspan LAB sales organization Sales Organization	
Hunt Group:	sais organization – Saios organization	
Service:	(Select Service) *	
Hunt Group Optional User		
	(Close Other Tabs)	
Hunt Group		
* Name:		
* Hunt Group ID:	@ clearspanlab.com 👻	
Support User:		
Department:	(None) *	
Phone Number:	(Select Phone Number) *	
Extension:		
	No Voice Mail	
Voice Portal Passcode:		
Confirm Portal Passcode:	(create a numeric passcode of 4 to 8 digits)	
Confirm Ponal Passcode.		
Calling Line ID Settings		
* Last Name:	* First Name:	
Phone Number:		
Handling:	Use the system default CLID configuration (currently including the Hunt Group Name in the CLID)	
	Customize the CLID for this Hunt Group	
	Include the Hunt Group Name in the CLID	
Hunt Group Settings		
Group Policy:	💿 Circular 🔹 💿 Regular 💿 Simultaneous 💿 Uniform 💿 Weighted Call Distribution	
Call Waiting:	Allow Call Waiting on agents	
Busy Settings		
Group Busy:	Enable Group Busy	
	Allow members to control Group Busy	
	Apply Group Busy When Terminating Call to Agent	
No Answer Settings		
No Answer:	Skip to next agent after 1 rings	
	Forward call after waiting 0 seconds	
Calls Forward to:		
Not Reachable Settings		
Not Reachable:	Enable Call Forwarding Not Reachable	
	Make Hunt Group Busy when all available agents are not reachable	
Calls Forward to:		
Services		
Select all Services required	by the Hunt Group:	

Figure 123: Hunt Group Page

- 5. If you select a service from the **Service** drop-down list, an additional Service Tab will appear. For example, if you select **Alternate Numbers**, the **Alternate Numbers** tab appears.
- 6. On the Hunt Group tab, enter a **Name** and unique **Hunt Group ID** for the hunt group, and select a domain from the drop-down list.
- 7. Select the Support User check box for Support.
- **8.** Configure the Department, Phone Number, Extension, Network Server Site, and Voice Mail settings for the Hunt Group.
- 9. Activated or Deactivated indicates the current status of the phone number selected. Change this setting if necessary. Select Activated (Recommended) if the phone will place and receive calls from outside the system, or Deactivated if the calls will be internal only.
- 10. Enter the Voice Portal Passcode and Confirm Portal Passcode.

- 11. Enter the Last Name, First Name, and Phone Number for Calling Line ID (CLID) Settings.
- **12.** Specify the hunt group's Calling Line ID **Handling**.

Select Use the system default CLID configuration to use the setting defined at the system level (displayed in parentheses).

Select Customize the CLID for this Hunt Group to use the setting defined on this page and check or clear **Include the Hunt Group Name** in the CLID.

- 13. Select the Group Policy.
 - Circular sends incoming calls to users according to their position in a list. After a call has been sent to the last user on the list, the next call is sent to the user at the top of the list.
 - Regular sends incoming calls to the next available user in the Hunt Group.
 - Simultaneous sends incoming calls to all user numbers at the same time. Once the call has been answered, the remaining calls to other users are released.
 - Uniform sends the current incoming call to the user who has been idle the longest. After a user has answered a call, they are moved to the bottom of the call queue.
 - Weighted Call Distribution assigns calls in a pseudo-random fashion according to their relative weight. Agents with a higher weight are assigned more incoming calls than agents with lower weights.
- 14. Select or clear the Allow Call Waiting on agents box. When Directory Number Hunting has been assigned to a Hunt Group, you can assign Call Waiting to Hunt Group agents so that they can handle more than one call directed to them, regardless of their Call Waiting feature status.
- 15. Select Enable Group Busy to activate the group busy policy for the hunt group.
- **16.** You can select **Allow members to control Group Busy** to give group members control over this policy.
- **17.** Select the **Apply Group Busy When Terminating Call to Agent** box to always apply the Enable Group Busy policy when calls are made through the directory hunting number.
- **18.** Select **Allow members to control Group Busy** to allow group members to control the hunt group's busy status.
- **19.** Select **Skip to next agent after** to have the system pass incoming unanswered calls to the next user, determined by the current group policy, after the specified number of rings.
- **20.** Select **Forward call after waiting** to forward calls that have not been answered by any user after the specified number of seconds to the specified phone number. This box accepts values from 0 to 7200 seconds (2 hours). Enter the **Calls Forward to** number where you want to transfer calls not answered in the time specified.
- **21.** Select **Enable Call Forwarding Not Reachable** to forward calls to the specified phone number when all agents are not reachable.
- 22. Select Make Hunt Group busy when all available agents are not reachable to apply busy treatment to calls when all available agents are not reachable. This setting is ignored if Enable Call Forwarding Not Reachable setting is not selected.
- **23.** Enter the **Calls Forward to** number where you want the calls to be forwarded when all agents are unreachable.

- 24. Use Add and Remove to select all user services required by the Hunt Group.
- 25. User Defined Fields— These fields are displayed only if the Enterprise User Fields are defined at the Enterprise level. To change the default value of the User Defined Fields, clear the Use Default check box and enter the value of the User Defined Field in the Value box.

Optional Tab

- 1. On the Optional tab, configure **Time Zone** and **Language**.
- 2. Specify up to three additional SIP addresses as **Aliases** to associate with the group. Calls directed to any of these aliases are redirected to the assigned Hunt Group.

Users Tab

On the Users tab, use Add and Remove to select Assigned Users as members of the Hunt Group.

Announcements Tab

OpEasy allows you to upload, delete, or configure audio or video announcement files to repositories. Announcements repositories are kept for Users, Auto Attendant and Hunt Group virtual users, and Groups. Once an announcement is saved to a repository, OpEasy allows you to assign it to Voice Mail Greetings, Auto Attendant menus, and Music On Hold. You can search, upload, rename, or delete announcements on a user's Announcements tab. You can also view announcement types, size, and usage. You can manage announcements when you create or modify a user, as described in the section *Announcements*.

Call Forward Tab

To configure call forwarding for the Hunt Group, select Call Forward from the Service drop-down. This service allows you to forward some or all of your incoming calls to a different phone number or SIP-URI. The type of forwarding determines whether a call is forwarded and the number to which that call is forwarded.

Call Forward Selective Tab

This Call Forward Selective service allows you to forward specific calls matching your pre-defined forwarding criteria to a different phone number or SIP-URI. The criteria for each forwarding criteria entry can be a list of up to 12 phone numbers or digit patterns, a specified time schedule, and a specified holiday schedule.

To configure selective call forwarding for the Hunt Group:

- 1. From the main menu, select **Provisioning** and then **Virtual Users**.
- 2. Select Hunt Groups.
- 3. Select the Enterprise and Group from the drop-down list, if necessary.
- 4. Search for a Hunt Group to edit, or click Add to create a new Hunt Group.
- 5. Click on the **Edit** link at the end of the row or click anywhere in the row of the user for which you want to set up call forwarding. The Advanced: User Modify page opens.
- 6. Select Call Forward Selective from the Service drop-down list.

- 7. Click On for Call Forwarding Selective to have specific calls forwarded, and enter a number or SIP-URI for the Default Forward-To Number destination. Select the Ring Reminder box to hear a short ring burst when the call is forwarded. This is important when users have forgotten the service is turned on and are at their primary phone waiting to receive calls.
- 8. Click Add Forwarding Criteria to create a new set of call forwarding criteria, or click Edit in the Forwarding Criteria table to modify or delete existing criteria. The Forwarding Criteria table displays the Calls From and Calls To columns. The Calls To criteria indicates if calls are forwarded based on the destination that was dialed. The Hunt Group: Call Forwarding Selective page opens.
- 9. Enter a Name/Description for the call forwarding selective entry.
- **10.** Choose to forward calls to the default number or another number, or choose Do Not Forward.
- 11. Specify the Time Schedule and/or Holiday Schedule for which to forward calls.
- 12. Choose to forward All Calls or calls from specific numbers. If you specify Calls from the following Phone Numbers, you can choose calls from Private Numbers and/or calls from Unavailable Numbers. You can also enter Specific Phone Numbers or number patterns using wildcard characters.
- **13.** Choose the numbers from the **Available Call To Numbers** list in the **Calls To** section, and click **Add** to use the number for the Calls To criteria.
- 14. Click OK.

Voice Mail Tab

- 1. To configure Voice Mail for the Hunt Group, select **Voice Mail** from the Service list. This service allows you to record messages for calls that are not answered or for busy calls.
- 2. If Voice Mail was previously enabled and saved, Delete Voice Mailbox and Reset Voice Mailbox buttons appear. Delete Voice Mailbox removes the voice mail account and any associated greetings without deleting the Hunt Group; Reset Voice Mailbox deletes and rebuilds the voice mail account and deletes any associated greetings to restore the Voice Mail Greetings settings to defaults.
- 3. Click the Active radio button, if necessary.
- 4. Select the Calls Sent to Voice Mail options that you want to set for the Hunt Group.
- 5. Choose the Voice Mail Server from the drop-down list. Select Clearspan: Group Server.
- 6. Choose Voice Mail Management settings to determine the Arriving Voice Mail Action options, Caller Options for dialing 0 to transfer, and the action to take After Playing Greeting.



CAUTION: E-mail copies of Voice Mail might not be sent over secure E-mail.

- 7. Enter the E-mail address, User ID and Select the Full Mailbox Limit in the Group Mail Server options. Server Password and Confirm Server Password will be displayed as per the Voice Mail Account Settings.
- 8. Click Apply, and then click OK.

Voice Mail Greetings Tab

- 1. Select Voice Mail Greetings from the Service drop-down list. The Voice Mail Greetings tab allows modification of a Hunt Group's Voice Mail Busy and No Answer greetings.
- 2. Set Greeting Source to System Greeting to use the standard voice mail greeting played for callers when the Hunt Group's lines are busy, or set it to **Personal Greeting** if you want to select a file from an available Announcement Repository. If you choose Personal Greeting, select the **Personal Audio Greeting** or **Personal Video Greeting** file to use.
- 3. In the No Answer Greeting Settings section, select the No Answer Greeting Type to either Use Extended Away Greeting or Use Normal No Answer Greeting, as configured on this page.
- 4. To configure Extended Away Greeting Settings, select an Audio Greeting or Video Greeting file from an available Announcement Repository. Select the Disable Message Deposit check box to prevent callers from leaving a Voice Mail message.
- 5. To configure Normal No Answer Greeting Settings, set the **Greeting Source** to the standard **System Greeting**, or select one of the alternate greetings configured on this page.
- **6.** To configure Unavailable Greeting Settings, select an **Audio Greeting** or **Video Greeting** file from an available Announcement Repository.
- 7. To configure an Alternate No Answer Greeting, select an **Audio Greeting** or **Video Greeting** file from an available Announcement Repository, and enter a **Name** that describes the greeting.
- 8. Click OK or Apply.

Alternate Numbers Tab

- 1. Select **Alternate Numbers** from the **Service** drop-down list. The Alternate Numbers tab allows up to ten additional phone numbers or extensions to be assigned in addition to your primary number and extension.
- 2. Select the phone number from the **Phone Number** drop-down list or add an extension, and select a **Ring Pattern**.
- 3. Click the Active check box to activate the alternate phone number or extension.
- 4. Click OK.

Configuring Flexible Seating Hosts

Flexible Seating allows users to associate with a Mitel (DMS) or a Polycom (DMS) host device and use it as if it were their own phone. To set up Flexible Seating, create a Flexible Seating host and then configure users with the Flexible Seating Guest service. Flexible Seating Guests can be any users within the relevant Group or Enterprise who have the "Flexible Seating Guest" service assigned, and who have a primary device configured that is the same device type as the host device. Assign the Flexible Seating Guest service to the group that will include the Flexible Seating host. For more information, refer to Authorizing Groups to Use a Service Pack.

Create and configure the Flexible Seating host phone, if you have not already. For more information, refer to Under Display Selection, select the Template Information box to include Phone Template information in the "Phone Devices" table. Check Registration Status to display the column for this additional information in the table *Adding a Phone Device*.

E/

- 1. To create the Flexible Seating host, select **Provisioning**, **Virtual Users**, and **Flexible Seating Hosts**.
- 2. Select the Enterprise and Group from the drop-down list, if necessary.
- 3. Search for a Flexible Seating host to edit, or click Add to create a new Flexible Seating host.

Note: If the Add button does not appear, then you are not authorized to add or delete virtual users.

Flexible Seating H Add a new flexible seating host.	lost Add
OK Cancel	
Enterprise: Group: Flexible Seating Host:	sales organization Sales Organization
Service:	(Select Service)
Host Optional Phone Gu	est Association
	(Close Other Tat
Host	
* Name:	@ clearspanlab com 👻
* Flexible Seating Host ID: Support User:	
Department:	(None) •
Phone Number:	(Select Phone Number)
Extension:	
Extension.	
Calling Line ID	
* Last Name:	* First Name:
Phone Number:	
Routing Policies	
	Allow Emergency Calls
	Allow Voice Portal Calls
Services	
00101000	by the Flexible Seating Host:
	Services Host Services
Authentication Basic Call Logs	

Figure 124: Flexible Seating Host Add Page

- 4. On the Host tab, enter a **Name** and unique **Flexible Seating Host ID**, and select a domain from the drop-down list.
- 5. Configure the **Department**, **Phone Number**, and **Extension** settings for the Flexible Seating host.
- 6. Enter the Last Name, First Name, and Phone Number for Calling Line ID (CLID) Settings.
- 7. Select the Routing Policies.
 - Allow Emergency Calls permits emergency calls from this user.
 - Allow Voice Portal Calls permits voice portal calls from this user.
- 8. Use Add and Remove to select all user services required by the Flexible Seating host.
- 9. User Defined Fields These fields are displayed only if the Enterprise User Fields are defined at the Enterprise level. To change the default value of the User Defined Fields, clear the Use Default check box and enter the value of the User Defined Field in the Value box.
- 10. Enter the Name, Password, and Confirm Password for Authentication.

11. The Primary Phone Device settings for Device Name, Device Level, Line/Port, VLAN ID, MAC Address, ERL Record Name, and Encryption are displayed after they are populated on the Phone Tab of the Flexible Seating Host.

Optional Tab

On the Optional tab, configure **Class of Service**, **Time Zone**, and **Language**.

Phone Tab

- 1. On the Phone Tab, use the **Phone Devices** section to select a primary phone for the host. The host phone can have multiple users, with the virtual user host as one of the primary users on the phone. Click **Add Primary Phone** to display the Flexible Seating Host: Primary Phone Device Add page. To change an existing host phone device, click **Edit**.
- 2. On the Flexible Seating Host: Primary Phone Device Add page, search for and select the **Phone Device** to use as the host phone. To remove a phone device currently being used by a host, click **Unassign Device**. Click **OK** or **Cancel** to return to the Flexible Seating Host page.
- 3. On the Phone tab, select whether to **Restart Phones on Save**.
- 4. In the Phone Devices table, you can view or change the associated template, or edit the primary phone device for this host.

Guest Association Tab

- On the Guest Association tab, select the Association Limit check box and enter a number for Enforce Association Limit if you want to set a maximum time limit for a guest to be logged into the host phone.
- 2. Choose **Enterprise** or **Group** for the **Access Level** to restrict availability of the host phone to all users in a group or all users in the enterprise.
- **3.** The **Associated Guest** section shows information about any guest currently using the host phone. You can click **Force Release Association** to log the current guest off the host phone.

Privacy Tab

- 1. Select **Privacy** from the **Service** drop-down menu to access the Privacy tab.
- 2. For Privacy Enable, select the privacy settings for the Flexible Seating host.
 - Enable Directory Privacy excludes the host from Directory listings.
 - Enable Auto Attendant Extension Dialing Privacy excludes the host from auto extension dialing.
 - Enable Auto Attendant Name Dialing Privacy excludes the host from auto name dialing.
- 3. Click OK or Apply.

After you have created a Flexible Seating host, configure users with the Flexible Seating Guest service to associate with the host device.

While a guest is associated with it, the host phone functions like the user's phone device, including all the key assignments and functions. When no guest is associated with the host phone, the phone can make emergency calls only or calls into the voice portal.

Group Paging

The Group Paging service allows the authorized users (paging group originators) to page a group of users (paging group targets) by dialing a phone number or an extension. OpEasy enables to configure or add the list of originators, targets and manage settings.

Only Group Administrator and above can configure the Group Paging.

The Group Paging screen displays the list of Paging Group for selected Enterprise and Group.

Adding a new Group Paging

1. Select Provisioning from the main menu, and then select Virtual Users and Group Paging.

Group Paging Choose the desired Enterprise and Group. To add a new paging group, press the Add button. To display a list of group paging to edit or delete, press the Search but
OK Cancel Apply Add
Enterprise: (Select Enterprise) Group: (Select Group)
Group Paging Search

Figure 125: Group Paging

- 2. Select the Enterprise and Group from the drop-down list.
- 3. Click the Add button. The Group Paging Add page is displayed.

Group Paging Modify
Modify an existing paging group.
OK Cancel Apply Delete
Enterprise: clearspanlab Clearspan LAB Group: sales organization Sales Organization
Group Paging Group, Page, 1 (606338900)@clearspanlab.com)
Service: (Select Service) 👻
Group Paging Optional Originators Targets
Group Paging
* Name: Group_Page_1
Support User:
Department: (None)
* Phone Number: 606-333-8900 -
Extension: 8900
Network Server Site: DFLT_SITE Default Site
Confirmation Tone Sending Timeout: 1 - (Seconds)
Time Zone: (GMT-05:00) (US) Central Time
Calling Line ID Settings

Figure 126: Add Group Paging

- 4. Enter a Name for the Group Paging under the Group Paging tab.
- 5. Enter a Paging Group ID.
- 6. Select the Support User check box for Support.

- 7. Select Department from the drop-down list.
- 8. Select the Phone Number.
- 9. Enter the Extension number.
- 10. Select the time (seconds) for Confirmation Tone Sending Timeout.
- 11. Select the Time Zone from the drop-down list.
- 12. Enter Last Name and First Name for Group Paging under the Calling Line ID Settings tab.
- 13. Select Paging Group or Originating User with Prefix with prefix under Calling Line ID deliver.
- 14. Select all the Services required by the Group Paging under the Services tab.
- 15. User Defined Fields These fields are displayed only if the Enterprise User Fields are defined at the Enterprise level. To change the default value of the User Defined Fields, clear the Use Default check box and enter the value of the User Defined Field in the Value box.
- 16. Click OK.

Modifying Group Paging

- 1. Select **Provisioning** from the main menu, and then select **Virtual Users** and **Group Paging**.
- 2. Select the Enterprise and Group from the drop-down list in the Group Paging page.
- 3. Click Search. It displays the list of paging groups.
- 4. Click Edit at the end of the row for any tag you want to edit. It displays the Group Paging Modify page.

Group Paging Modify Modify an existing paging group.	
OK Cancel Apply Delete	
Enterprise: clearspaniab Clearspan LAB Group: sales organization Sales Organization Group Paging: Group_Page_1 (6063339900@clearspaniab.com) Service: (Select Service)	
Group Paging Optional Originators Targets	
(Ci	ose Other Tabs)
Group Paging	
* Name: Group_Page_1	
* Paging Group ID: 6063338900 @ clearspaniab.com +	
Support User:	
Department: (None) -	
* Phone Number: 606-333-8900 e Octivated	
Extension: 8900	
Network Server Site: DFLT_SITE - Default Site +	
Confirmation Tone Sending Timeout:	
Time Zone: ((GMT-05:00) (US) Central Time 👻	
Calling Line ID Settings	

Figure 127: Modify Group Paging

Optional Tab

- 1. Select the Class of Service from the drop-down list.
- 2. Select the Language from the drop-down list.
- 3. Enter the aliases in the Aliases tab.

Originators Tab

- 1. Select the User Search from drop-down list in the Paging Group Originators tab.
- 2. Click Search to list the list of Available Originators that can be added or removed to the Assigned Targets.

Targets Tab

- 1. Select the **User Search** from drop-down list in the Paging Group Targets tab.
- 2. Click Search to list the list of Available Targets that can be added or removed to the Assigned Targets.

Activate/Deactivate Group Paging

- 1. Select the **Enterprise** and **Group** from the drop-down list in the Group Paging page.
- 2. Click **Search** to display all the paging groups under the selected Enterprise and Group.
- 3. Select the Active checkbox to activate the paging group.

	Paging esired Enterprise and G	roup. To add a new paging	g group, press the Add button.	To display a list of group	paging to edit or delete, press the Search b	outton.
OK	Cancel	Apply Add]			
	· · · · ·	oanlab Clearspan LAB				
	up Paging Search:	Search		Group Paging		
Active	Name 👌	Department 👌	Phone Number 👌	Extension 😋	Group Paging ID 💠	Mitel Support 👌
v	Group_Page_1		606-333-8900	8900	6063338900@clearspanlab.com	
				- End of Group Pagin	-	

Figure 128: Activate/Deactivate Group Paging

4. Click OK.

Virtual User Inventory

The Virtual User Inventory allows you to search and display the inventory of all virtual users in Clearspan.

- 1. Select **Provisioning** from the main menu, and then select **Virtual Users** and **Virtual User Inventory**.
- 2. Select the Enterprise and Group from the drop-down list, if necessary.
- **3.** Click **Search** to display all virtual users, or enter search parameters to filter your search. The search in the following figure is an example of the Virtual User Inventory page.

ОК	Cancel Apply								
Enterp	rise: clearspanlab Clearsp	an LAB 💌							
Group: sales organization - Sales Organization -									
G	oup. Jacios organization Sa	ico organizadori 👻							
Virtual User	Search: Search								
(All Virtual U									
			Virt	ual Users					
		Virtual User Type ᅌ	Virt	ual Users Phone Number 🗘	Extension 💠	User ID ≎	Mitel Sup		
(All Virtual U	(sers) - Contains: -	Virtual User Type ≎ Flexible Seating Host			Extension 🗇	User ID ≎ 6063338921@clearspania	-		
(All Virtual U Active	sers) Contains: Name			Phone Number 💠					
(All Virtual U Active	Sers) Contains: Name Flexi Seating 1	Flexible Seating Host		Phone Number 606-333-8921	8921	6063338921@clearspanial			

Figure 129: Virtual User Inventory Search

Import

The Import function allows you to Add, Modify, and Delete multiple users, devices, or features using a spreadsheet (worksheet). Import types include:

- Advanced–Advanced Import allows you to manipulate multiple users by spreadsheet as in Basic Import; however, it also allows you to assign features such as Call Forwarding, Busy Lamp Field, Hoteling, and so on. You can perform more functions than you can using Basic Import including Auto Attendant configuration and trunk user migration.
- Enterprise–Enterprise Import allows you to configure Enterprise settings such as Voice VPN policies, Departments, and Phone Numbers.
- Group–Group Import allows you to configure group settings such as Authorization Codes, Call Pickup Groups, Departments, Phone Numbers, and User Profiles. The ManageGroups tab allows creating, modifying, and deleting Groups. It handles Import and Export of the Group profile information, authorizing and assigning the Group Services and Service Packs, Group Call Processing Policies, Password and Passcode rules for the Group, and setting up the Group Voice Portal access.

For information about the worksheet versions for each release, refer to the *OpEasy Release Notes*. For detailed information about each spreadsheet's columns and commands, as well as version differences, refer to the *Import Worksheet Definitions* guide.

The Import: Advanced page displays the number of User Licenses that are used and available. Administrators can, if needed, set the User or 3rd Party licensing for an enterprise to Auto, so that licenses do not have to be set and maintained manually. For more information, refer to Configuring License Allocations.

The Import: Advanced and Import: Group pages allow you to upload one or more Announcement Files along with your spreadsheet.

Opening a Worksheet

To add or remove users, devices, or features using import, you must first open and prepare an Excel worksheet to use.

- 1. In OpEasy, click Import from the menu tree or from the main Provisioning menu.
- 2. Select the Import Type and Enterprise on the Import page.
- 3. Click Get Worksheet.
- 4. Click **Open**. The new worksheet opens. Do not try to edit the worksheet until you have cleared all the Windows security warnings.
- 5. Click Enable Editing. The appropriate new spreadsheet opens.

Editing the Worksheet

After you have retrieved and opened an Excel worksheet to use, fill it in with the changes you want to import.

A	B	С	D	E	F	G	H		J	K
Enterprise:	Moorehouse	Moore Enterprises of Texas	;							
Date:									opea:	5U 🔊 —
Version:	A274								Provisioni	ng 🖌
Aodify Comm	and:		ModifyUser	ModifyUser	ModifyUser	ModifyUser	ModifyUser	ModifyUser	ModifyDevice	Modify Device
		(See DataHelp)			(NULL will delete)	(NULL will delete)	(NULL will delete)	(Activate/Deactivate)	(NULL will delete)	(Enter only if ID set at device leve (NULL will delete
	General Inform	ation								
							Phone Number			
status	Command	Group ID	Last Name	First Name	Email Address	Department	(Primary)	Phone Number Activation	Physical Location	VLAN ID
	Done									
		Commands								
		AddUser	Add a new user							
		ModifyUser		nation (modifiable fie	lds indicated by ModifyUser)					
		DeleteUser	Delete the user							
		AddUserDevice			d assign the device)					
		AddUserAssignDevice		nd assign to an exist						
		AddMigDeviceUser	Add a new User a	nd new Device witho	ut assigning the phone number.	A later MigrateTrunkU	ser can migrate a 1	Trunk User to this Device User		
		AddDevice	Add a new device							
		ModifyDevice			fields indicated by ModifyDevice)					
		ReplaceDevice			al Phone Device with another ph	one of an identical Mod	lel and Functionalit	ty		
		DeleteDevice	Delete the device							
		AssignDevice	Assign a device to	the specified user						
		UnassignDevice	Unassign a device	e from the specified u	iser					
		ModifyUserId			ced in the Extension column					
		AssignSP	Assign one or mo	re Service Packs (se	parate service packs with ALT-E	NTER in the workshee	1)			
		ReplaceSP	Replace all user s	ervice packs with the	ose specified (separate service p	oacks with ALT-ENTER	in the worksheet)			
		DeleteSP	Delete one or mor	re service packs (se	parate service pack names with A	ALT-ENTER in the work	sheet)			
		DeleteAlISP	Delete all Service	Packs for the user						
		AddCBAC	Add the specified	communication barri	ng auth code					
		DeleteCBAC	Delete the specific	ed communication ba	arring auth code					

Figure 130: Import Advanced – Get Worksheet – New Worksheet

A9	▼ (○	f_{x}					
A	В	С	D	E	F	G	Н
1 Enterprise:	Moorehouse						
2 Date:							opeasy
3 Version:	E220						Provisioning
4							
5 Modify Comm	and:			Modify	Modify	Modify	Modify
6			(1-50) chars	Only entered during Modify to change dept name (0-50 chars)	NULL will delete.	NULL will delete	NULL will delete
7			(1-50) citars	(0-50 chars)	NULL WII Gelete.	NOLL WII delete	NOLL WII delete
				New Department		Department Calling	Department Calling
8 Status	Command	Group	Department Name	Name	Parent Department	Line ID Name	Line ID Number
15							
16							
17							
18	Done						
19		Commands:	Description:				
20		AddEntDept	Add Enterprise Departn	nent			
21		ModifyEntDept	Modify Enterprise Depa	rtment data			
22		DeleteEntDept	Delete Enterprise Depa	rtment			
22 23							
24		AddGroupDept	Add Group Department				
25		ModifyGroupDept	Modify Group Departme	ent data			
26		DeleteGroupDept	Delete Group Departme				
26 27							
28		Done	Done (end processing)				
4 N N Datal	Jola Danartm	anto / Entomical/aira	VDMDalicy DhanaMumh			41 m 1	

Figure 131: Import Enterprise – Get Worksheet – New Worksheet

	N18	▼ (*	f_x			
	Α	В	С	D	E	F
1	Enterprise:	Moorehouse				
2	Date:					Upeasy 》
3	Version:	G214				Provisioning /
4						
0	Modify Comma	and:			Modify	
6			(See DataHelp)			
1	.	<u> </u>			B 14	F D
	Status	Command	Group	Authorization Code	Description	Error Response
9						
10						
11						
12						
13						
14		Done				
15			Commands	Description		
16			Add	Add Group Communication	Barring Authorization Code	
17			Modify	Modify the description of a	n existing Authorization Code - only the description may be modified	
18			Delete	Delete a Communication E	arring Authorization Code	
19			Done	Done (end processing)		
20						
21						
00	▶ N DataH					
14 4	H DataH	lelp Authorizat	tionCodes / CallPickupG	roups / Departments / Hu	nt Groups 🖉 HG Voicemail 🧹 HG CallForwarding 📈 HG CallForwardingSe	lective / PhoneNumb 4 💷

Figure 132: Import Group – Get Worksheet – New Worksheet

1. Enter the commands in the **Command** column and the corresponding information that you wish to process into each column. Each tab shows all possible commands that can be used and the definitions of those commands, as in the following example.

	General Informatic	n					Phone Number					
tatus	Command	Group ID	Last Name	First Name	Email Address	Department	(Primary)	Phone Number Activation	Physical Location	VLAN ID	User ERL Record Name	Voice Portal Passcod
	Done											
	Done	Commands										
		AddUser	Add a new user									
		ModifyUser		ation (modifiable fiel	ds indicated by ModifyUser)							
		DeleteUser	Delete the user									
		AddUserDevice		nd a new Device (and	d assign the device)							
		AddUserAssignDevice		nd assign to an existi								
		AddMigDeviceUser			ut assigning the phone number.	A later MigrateTrunkUs	er can migrate a Tr	unk User to this Device User.				
		AddDevice	Add a new device									
		ModifyDevice			elds indicated by ModifyDevice							
		ReplaceDevice	Prepare database	to replace a physica	Phone Device with another ph	one of an identical Mode	and Functionality					
		DeleteDevice	Delete the device									
		AssignDevice	Assign a device to									
		UnassignDevice		from the specified us								
		ModifyUserId			ed in the Extension column							
		AssignSP			parate service packs with ALT-E							
		ReplaceSP			se specified (separate service p							
		DeleteSP			arate service pack names with	ALT-ENTER in the work:	sheet)					
		DeleteAlISP	Delete all Service F									
		AddCBAC		communication barrin								
		DeleteCBAC		d communication bar								
		AssignCPG		e specified Call Picku								
		DeleteCPG		m the specified Call								
		AssignHG		the specified Hunt G								
		DeleteHG		m the specified Hunt								
		ReorderUsers			ice (First row contains the Con	mand, Group ID, first U	serid entry, and De	vice Name, subsequent rows m	ay contain additional U	serids. Position co	lumn only used by AudioCodes de	evices, which use Static C
		Done	Done (end process	sing)								

Figure 133: Advanced Worksheet Commands – Users Tab

Only those rows with "Commands" entered will be processed.

If you just want to assign Hoteling, for example, you can run the spreadsheet and it will process only the commands in the Hoteling portion, if there are no other commands in the spreadsheet. You do not need to have any data in any other tab in the spreadsheet.

Each spreadsheet shows the acceptable commands for that spreadsheet.

2. Save the worksheet with a meaningful name so that you can use it in the Import process. The new worksheet is named, for example, "ClearspanAdvancedImport_<your username>.xlsx".

It is helpful to save your spreadsheets and keep the data in the spreadsheet. For example, you can keep your user lists in the Users tab, and if there are no commands to execute, the list remains and you keep your data. This applies to all tabs of the spreadsheet.



Note: All users must have the appropriate services assigned to them in Clearspan.

Importing the Worksheet

The Import page allows you to set up Worksheet processing and view results.

- 1. In OpEasy, click Import in the menu tree or click Import on the menu page.
- 2. Select Import Type drop-down list.

Import a list of phone devices, user Press 'Start Import' to begin import Press 'Retrieve Results' to downloa	processing. To schedule	adsheet. an import for later processing, press 'Schedule In port. Press 'E-mail Results' to E-mail results of t	nport'. he current ir	nport.
OK Get Workshe	et E-mail Workshe	et Scheduling		
Import				
Import Type:	Import: Advanced 👻			
Enterprise:	Bulk Provisioning Lab	Val, Inc 👻		
* Provisioning Spreadsheet:	* Provisioning Sprea	dsheet		
Announcement Files:	Announcement Files			
Notification:	Send E-mail Notifica	tion		
E-mail:	To: beena.premachandr	an@mitel.com		
	Attachment: 👿 Attach	Excel Spreadsheet		
	Attachment File Name:	ClearspanImportAdvancedResults_{Id}_{Time}	xlsx	
Retrieve:	Retrieve File Name:	ClearspanImportAdvancedResults_{Id}_{Time}	xlsx	
	(Useful tags for File Nam	es: {Id}, {Enterprise}, {Time}, {StartTime}, {EndT	ime}, {Admir	n})
Spreadsheet Version:	A282			
	Start Import	User Licenses (Enterprise):		148
	Schedule Import		Available:	Auto
		3rd Party Phone Licenses (Enterprise):	Used:	39
			Available:	Auto

Figure 134: Import Worsheet - Advanced

- 3. Select the Enterprise from the drop-down list, if needed. You cannot select a group.
- 4. Browse to the filename of the **Provisioning Spreadsheet** that you want to run. As a reminder, the **Spreadsheet Version** that is required is displayed on the Import page.
- 5. If you are importing **Announcement Files** to upload to an Announcement Repository, browse to the file to upload. If you are uploading multiple files, use a zip file.
- 6. Select the **Notification** check box to have an E-Mail notification sent to you with processing results.
- 7. Select the Attach Excel Spreadsheet box if you want to receive the results spreadsheet.
- 8. Enter the **Attachment File Name** in the text box, or keep the default. The system will rename the results file for you. You can also use the suggested tags (that are listed below the text box) in the filename.
- **9.** Enter the **Retrieve File Name** or keep the default. The system will rename the results file for you. You can also use the suggested tags in the filename.
- **10.** Click **Start Import**. Worksheet processing starts and the **Progress Messages** box is updated to reflect the text "**Import waiting to start...**".



Note: A User License is required for each added or modified user, and a 3rd Party Phone License is required for each added or modified Polycom phone. The import aborts on a line where a license could not be obtained. You can restart the import after adding the appropriate number and type of licenses to the Enterprise.

11. Click **Refresh** while processing is active to get status updates. The message "Import Advanced completed successfully" appears.

Viewing Import Results

After the import has processed, a message such as "*Successful: Import Advanced completed successfully*" appears at the bottom of the Import page.

- **1.** Click Retrieve Results.
- 2. Click Open. An Excel spreadsheet opens.

Enterprise:	Bulk Provisioning -	-Lab Val Inc					
Date:		Lab Fai, mo					
Version:							
Modify Comma	nd:		ModifyUser	ModifyUser	ModifyUser	ModifyUser	ModifyUse
		(Ose Detailists)				(NULL will delete)	
		(See DataHelp)			(NULL will delete)	(NULL will delete)	(NULL will dele
	General Information				(NOLL WIII delete)	(NULL WIII delete)	(NOLL WII dele
	General Information				(NOLL will delete)	(NULL WIII delete)	Phone Numb
Status	General Information		Last Name	First Name	Email Address	Department	
			Last Name	First Name			Phone Numb
	Command		Last Name	First Name			Phone Numb
	Command	Group ID	Last Name	First Name			Phone Numb
	Command	Group ID Commands	Add a new user				Phone Numb

Figure 135: Spreadsheet Processed Successfully – User Deleted

The following tabs are listed in the Advanced import excel sheet:

- Users
- AutoAttendant
- Announcements
- Voicemail
- AlternateNumbers
- BLF
- SCA
- UserDefinedFields
- CallCenterAgent
- CallCenterSupervisor
- CallForwarding
- CallForwardingSelective
- CallRecording
- ClearspanAnywhere
- CutsomRing
- FaxMessaging
- FlexSeatingGuest
- Hoteling

- IntegratedIM&P
- MusicOnHold
- PriorityAlert
- Privacy
- SequentialRing
- SimultaneousRing
- SpeedDial
- VMDistribution
- MigrateTrunkUser
- DeviceTypeConversion

Enterpris	e: Bulk Provisionin	ig Lab Val, Inc						
Dat	e:							
Versio	n: A282							
Modify Com	mand:		ModifyUser	ModifyUser	ModifyUser	ModifyUser	ModifyUser	ModifyUser
		(See DataHelp)			(NULL will delete)	(NULL will delete)	(NULL will delete)	(Activate/Deactivate)
	General Informa	ation						
							Phone Number	
Status	Command	Group ID	Last Name	First Name	Email Address	Department	(Primary)	Phone Number Activation
	AddUser	BNG 6	BNG 6	x1020			6103331020	Activate
		_	_					
	Done							
		Commands						
		AddUser	Add a new user					
		ModifyUser	Modify user inform	ation (modifiable field	is indicated by ModifyUser)			
		DeleteUser	Delete the user					
		AddUserDevice	Add a new User ar	nd a new Device (and	assign the device)			
		AddUserAssignDevice	Add a new User ar	nd assign to an existir	na device			

Figure 136: Advanced Import Excel Sheet

The following tabs are listed in the Import System excel sheet:

- AINList
- AccountIDs

4	A	В	С	D	E	F	G H
	Date	04/07/2020 06:	38:05				
2	Version	S205					
3							
4							Provisioning A
į	Modify Comma	nd:			Modify	Modify	
0					(5-15 digits)	(max 80 chars)	
/ B	Status	Command	Enterprise ID	Group ID	AIN List	Description	Error Response
	Failure	Add	India	BNG_5		AddedThroughImportSystem	Error: Could not add AIN - Duplicate AIN already exists in the
0	. and c			0.110_0		, adout in ought porto yotom	Ener oone net add fint bapied of int around one in the
11							
2		Done					
3			Commands:	Description:			
14			Add		dded to a group (First row o	of each enterprise and group conta	ins the command, subsequent rows may contain additional entries t
15			DeleteEntries				ins the command, subsequent rows may contain additional entries t
6			DeleteList		re removed from a group	,	,
17			ReplaceList			a newly supplied list (First row of	each enterprise and group contains the command, subsequent rows
18							
9			Done	Done (end processing)			
20							
21							
2							
23							
24							
25							
6	1						
		taHelp AINList	t AccountIDs	(+)			

Figure 137: Import System Excel Sheet

The following tabs are listed in the Import Enterprise excel sheet:

- Departments
- EnterpriseVoiceVPNPolicy
- PhoneNumbers
- AccountIDs

4	А	В	С	D	E	F	G	Н
1	Enterprise:	TestTest Shivu's	Enterprise					
2	Date:	04/07/2020 06:47:	47					opeasu
3	Version:	E225						Provisioning
4								
5	Modify Comman	d:			Modify	Modify	Modify	Modify
6				(1-50) chars	Only entered during Modify to change dept name (0- 50 chars)	NULL will delete.	NULL will delete	NULL will delete
7					New Department		Department Calling	Department Calling
8	Status	Command	Group ID	Department Name	Name	Parent Department	Line ID Name	Line ID Number
9	Success	ModifyEntDept		TestTest	TestTest1			
10								
11								
12		Done						
13			Commands:	Description:				
14			AddEntDept	Add Enterprise Departm	ent			
15			ModifyEntDept	Modify Enterprise Depar	tment data			
16			DeleteEntDept	Delete Enterprise Depar	tment			
17								
18			AddGroupDept	Add Group Department				
19			ModifyGroupDept	Modify Group Departme	nt data			
20			DeleteGroupDept	Delete Group Department	nt			
21								
22 23			Done	Done (end processing)				
23								
	Data	aHelp Departme	nts EnterpriseVoi	ceVPNPolicy PhoneNur	nbers AccountIDs	÷ : •) i i i i i i i i i i i i i i i i i i i

Figure 138: Import Enterprise Excel Sheet

The following tabs are listed in the Import Group excel sheet:

- Announcements
- AuthorizationCodes
- CallPickupGroups
- Departments
- FlexSeatingHosts
- FSH Guest Association
- FSH Privacy
- Gbl Settings Mitel Aastra
- Gbl Settings Mitel DECT112
- Gbl Settings Mitel MiVoice
- Gbl Settings Cisco
- Gbl Settings Panasonic
- Gbl Settings Polycom
- Gbl Settings AudioCodes 1XX
- Gbl Settings Media5
- Gbl Settings CSEngage Desktop
- Gbl Settings CC S4B
- Gbl Settings CC Mobile
- Gbl Settings CC Tablet

- Gbl Settings CS MobileTablet
- Gbl Settings CSEngage MobTab
- Group Paging
- Hunt Groups
- HG Voicemail
- HG AlternateNumbers
- HG CallForwarding
- HG CallForwardingSelective
- ManageGroups
- MusicOnHold
- PhoneNumbers
- SpeedDial8
- SpeedDial100
- UserDefinedFields
- UserProfiles
- VirtualOnNetExtensions
- VoicePortals

-							-	_
Enterprise	: Bulk Provisio	oning Lab Val, Inc						
Date	:							- (
Version	G285 3							
	. 0200.0							
Modify Comma	nd:			Modify	Modify	Modify		
				(True/False)	(1-999, default 12)	(Enterprise or Group)		
	General Inform	nation		(Tue/Taise)	(1-555, deladit 12)	Group)	Guest Information - Expor	t Only
Status	Command	Group ID	Flex Seating Host ID	Enforce Association	Association Limit	Access Level	Last Name	F
			_					
	Done							
	20110	Commands						
		Modify	Modify Flexible Seating	Host Guest Association				
		ReleaseAssociation	Release Guest Associa					
		Done	Done (end processing)					

Figure 139: Import Group Excel Sheet

Export

The Export function allows you to obtain information on users and features from the Clearspan system database. The information is presented in Excel spreadsheets created by the system. Advanced, System, Enterprise, and Group exports are supported; there is no option to export data for Basic Import.

Using the Exported Worksheets checklist, you can export one or more spreadsheets at the same time. If you run more than one at one time, a separate tab is created in the Results spreadsheet for each of the features that you chose.

The Enter Search Criteria section of the page allows you to be selective in the data you choose to obtain. You can search by a specific field and use the plus sign + to add criteria.

Exporting User Defined Fields

Select the **UserDefinedField** check box in the Advanced export page to export the User Defined Field Values for Users and Auto Attendants, or select the **UserDefinedField** check box in the Group Export page to export the User Defined Fields for Hunt Groups and Flexible Seating Hosts.

The following search criteria can be used to refine the export results:

Advanced Export:

User Defined Field Name

Group Export:

- User Defined Field: Virtual User ID.
- User Defined Field: Field Name
- User Defined Field: Include Unsupported User Types

If no search criteria are selected in the Enter Search Criteria section, the User Defined Fields of all Users and all Auto Attendants in the Enterprise or Group are exported.

If any of the User tabs (check boxes) are selected in the Advanced Export page, or User search criteria is selected, and the AutoAttendant tab or Auto Attendant search criteria are not selected, then only the User Defined Fields for Users are exported.



Notes:

• The AutoAttendant search criteria include AutoAttendant ID, AutoAttendant Name, and AutoAttendant Type.

	a spread	
OK Sche	eduling	
Export		
Expo	ort Type:	Export: Advanced 👻
Ente	erprise:	Bulk Provisioning Lab Val, Inc 👻
Exported Work	(sheets:	Select All Clear All
		VoisersAutoAttendantAnnouncementsVoicemailAlternateNumbersBLFSCACallCenterAgentCallCenterSupervisorCallForwardingCallForwardingSelectiveCallRecordingClearspanAnywhereCustomRingFaxMessagingFlexSeatingGuestHotelingIntegratedIM&PMusicOnHoldPriorityAlertPrivacySequentialRingSimultaneousRingSpeedDialVMDistributionMedia5AndMediaPackReportDeviceTypeConversionUserDefinedFields
Notif	fication:	Send E-mail Notification
	E-mail:	To: beena.premachandran@mitel.com
		Attachment 📝 Attach Excel Spreadsheet
		Attachment File Name: ClearspanExportAdvanced_[id]_(Time).xlsx
R	etrieve:	Retrieve File Name: ClearspanExportAdvanced_[id]_(Time).xlsx
		(Useful tags for File Names: {Id}, {Enterprise}, {Time}, {StartTime}, {EndTime}, {Admin})
Spreadsheet V	Version:	A282.4
Enter Search Cri		
		Start Export Schedule Export

Figure 140: Export-Advanced Clearspan Data

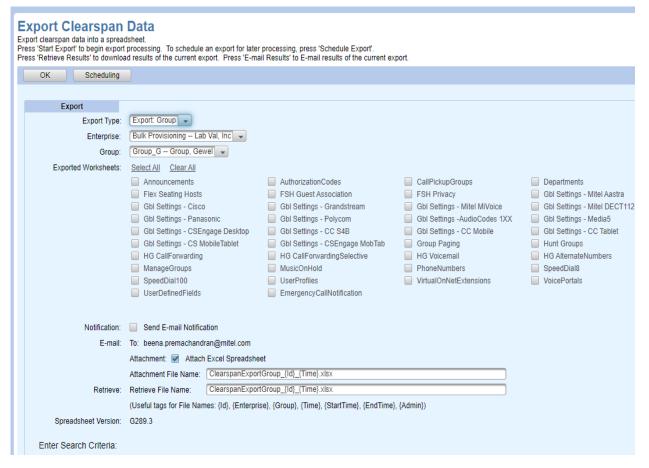


Figure 141: Export-Group Clearspan Data

Selecting Data to Export

Advanced, System, Enterprise, and Group data can be exported. However, Group Administrators cannot export Enterprise data, and Department Administrators can export Advanced data only.

- 1. In OpEasy, click **Export** from the menu tree or from the main Provisioning menu.
- 2. Select the Export Type and Enterprise from the drop-down lists.
- 3. Select the type of information you want in the Exported Worksheets checklist.
- 4. Select the **Notification** check box to have an E-Mail notification sent to you with processing results.
- 5. Select the Attach Excel Spreadsheet box if you want to receive the results spreadsheet.
- 6. Enter the **Attachment File Name** in the text box or keep the default. The system will rename the results file for you. You can also use the suggested tags in the filename.
- 7. Enter the **Retrieve File Name** or keep the default. The system will rename the results file for you. You can also use the suggested tags in the filename.
- 8. Enter the Search Criteria.

- 9. Click Start Export.
- **10.** Click **Refresh** to get status updates on processing. When the process is complete, a message such as *Export Advanced completed successfully* will display.

Results		
Results:	Completed Start Time:	10/21/2020 11:05:42
		10/21/2020 11:06:18
Scheduling Request ID:		
Scheduling Results ID:		10/21/2020 11:06:18
	Retrieve Results Notification:	E-mail Notification Sent
	E-mail Results	
	Delete	
Details:	*** Clearspan Export: Advanced ***	
	Enterprise: Bulk Provisioning Lab Val, Inc	
	Scheduling:	
	Request ID: 112347 Started: 10/21/2020 11:05:42	
	Finished: 10/21/2020 11:06:17	
	SUCCESSFUL: Export: Advanced completed successfully	
		//

Figure 142: Export Clearspan Data – Advanced Export Complete

Viewing the Export Results

Click Retrieve Results. The spreadsheet opens. On each tab, the Command options display so that you can process the spreadsheet using the Import function to make changes if necessary.

Sample Spreadsheets for Export

Enterprise:	Bulk Provisioning Lab	Val, Inc				
Date:	10/21/2020 10:56:45					
Version:	A282.4					
Modify Comm	nand:		ModifyUser	ModifyUser	ModifyUser	ModifyUser
		(See DataHelp)			(NULL will delete)	(NULL will delete)
Status	Command	Group ID	Last Name	First Name	Email Address	Department
		Group G	LTest04	FTest04		Dept 1 (Group)
		Gloup G				Dept I (Gloup)
		Group_G Group_Pronto	Tester002	Test002	Test002@labval.mitel.com	Dept_1 (Group)
					Test002@labval.mitel.com Test003@labval.mitel.com	Dept_1 (Group)
		Group_Pronto	Tester002	Test002	-	Dept_1 (Group)
		Group_Pronto Group_Pronto	Tester002 Tester003	Test002 Test003	Test003@labval.mitel.com	
		Group_Pronto Group_Pronto Group_Pronto	Tester002 Tester003 Tester004	Test002 Test003 Test004	Test003@labval.mitel.com Test004@labval.mitel.com	
		Group_Pronto Group_Pronto Group_Pronto Group_Pronto	Tester002 Tester003 Tester004 Tester005	Test002 Test003 Test004 Test005	Test003@labval.mitel.com Test004@labval.mitel.com Test005@labval.mitel.com	
		Group_Pronto Group_Pronto Group_Pronto Group_Pronto Group_H	Tester002 Tester003 Tester004 Tester005 Tester001	Test002 Test003 Test004 Test005 Test001	Test003@labval.mitel.com Test004@labval.mitel.com Test005@labval.mitel.com Test001@labval.mitel.com	
		Group_Pronto Group_Pronto Group_Pronto Group_Pronto Group_H Group_H	Tester002 Tester003 Tester004 Tester005 Tester001 Tester002	Test002 Test003 Test004 Test005 Test001 Test002	Test003@labval.mitel.com Test004@labval.mitel.com Test005@labval.mitel.com Test001@labval.mitel.com Test002@labval.mitel.com	

Figure 143: Advanced Export Results Spreadsheet

Date:	10/21/2020 1	0:58:42					
Version:	S206.1						
Aodify Comma	nd:						
						(true/false)	
	Administrator			Password			E-mail
				Password	Password	Change Password	
Status	Command	Login Name	Administrator Name	Changed Time	Remaining Time	Next Login	E-mail Address
		MitelAdmin	Mitel Administrator	2016/10/11 07:10:15		False	
		00Tester	Test Tester	2020/08/17 07:54:49		False	dru.nelson@mitel.com
		alavoie	Arlan LaVoie	2020/04/22 12:51:58		False	arlan.lavoie@aastra.com
		alavoie-sa	Arlan	2017/01/11 13:39:40		False	arlan.lavoie@aastra.com
		alavoie-sr		2017/01/11 13:39:57		False	
		arjun	Arjun Varadannavar	2020/03/24 12:23:36		False	arjun.varadannavar@mitel.co
		arjunasdf	arjunasdf	2020/09/02 01:02:43		False	arjun.varadannavar@mitel.co
		arjunasdf1	arjunasdf	2019/12/06 04:04:17		False	
		arjunbvSA	arjunbvSA	2020/08/09 07:01:18		False	arjun.varadannavar@mitel.co
		arjunbvSr1	arjunsr1	2020/03/24 08:10:15		False	arjun.varadannavar@mitel.co
		arjundept	arjundept	2020/03/02 03:34:42		False	arjun.varadannavar@mitel.co
		arjunea		2019/11/11 05:41:00		False	
		arjunSR	arjunSR	2018/09/03 01:41:43		False	
ор	Easy Adminis		arjanori	2010/00/00 01.41.40		: •	

Figure 144: System Data Export Results Spreadsheet

Enterprise	: Bulk Provisio	ning Lab Val, I	nc				
Date	: 10/21/2020	11:00:35					
Version	: E225						
Modify Com	mand:			Modify	Modify	Modify	Modify
			(1-50) chars	Only entered during Modify to change dept name (0-50 chars)	NULL will delete.	NULL will delete.	NULL will delete.
		Enterprise Department					
Status	Command	Group ID	Department Name	New Department Name	Parent Department	Department Calling Line ID Name	Department Calling Line ID Number
			000_Test1'juju				
		Group_G	00TestGrpDpt_EntParent		Dept_1 (Enterprise)		
			CallCenter - Ent				
		Group_G	Department,WithAReallyLongName			Long_Name	
		Group_G	Dept_1				
			Dept_1				
		Group_G	Dept_2			Dept2_Gewel	9763331122
			Dept_2				
		Group_G	Dept_3		000_Test1'juju (Enterprise)	clid name 03	
		Group_G	Dept_4		000_Test1'juju (Enterprise)		
	_	Group_P	Dept_Pop1				
De De	epartments						

Figure 145: Enterprise Data Export Results

Enterprise:	EngLabTest Eng	gineering Lab Testing	1					
Date:								
Version:	G285.3					Provisioning		
Aodify Comman	d:		Modify		Modify			
		(See DataHelp)	(True/False)		(NULL will delete)			
Status	Command	Group ID	Auto Reset	Authorization Code	Description	Error Response		
	Done							
		Commands	Description					
		Add	Add Group C					
		Modify	Modify the description or Auto Reset selection of an existing Authorization Code					
		Delete	Delete a Cor	mmunication Barring Au				
		Done	Done (end pi Done (end processing)					
	horizationCodes	CallPickupGroups	Departmen	nts Flex Seating Hos	sts FSH Guest Association	FSH Privacy (+) :		

Figure 146: Group Data Export Results

Scheduling an Import or Export

You can schedule an Import or Export to happen later or on a recurring basis. The Scheduling page displays imports and exports that have already been scheduled to run.

- 1. From the OpEasy main menu, select **Provisioning**, and then select **Import** or **Export**.
- 2. Configure the Import or Export information that you want to use.
- 3. Click Schedule Import or Schedule Export. The Scheduling Request page opens.



Note: Do not use the Start Import or Start Export button until you have provided the Schedule information.

	est: Import: Advanced dvanced on a pre-defined schedule.
OK Cancel	
Scheduling Request	
	Import: Advanced
Request ID:	
Creating OpEasy Admin:	Beena
Request Creation Time:	
Enterprise:	Bulk Provisioning Lab Val, Inc
Import Spreadsheet:	ClearspanImportAdvanced_BulkProvisioning.xlsx
	Start Import
Schedule	
Schedule:	Run Once 👻
Start Time:	11/30/2020 05:26 (Date and time, in 'MM/DD/YYYY HH:MM' format. Example: 11/19/2012 21:00)
E-mail Notification	
Success:	E-mail notification of successful completion:
	To: beena.premachandran@mitel.com
	From: No-Reply@tb20ems1public.cslab.mitel.com
	Subject: Clearspan Import: Advanced
	Attach Excel Spreadsheet:
	File Name: ClearspanImportAdvancedResults_(Id)_{Time}.xlsx
Failure:	E-mail notification of failure:
	To: beena.premachandran@mitel.com
	From: No-Reply@tb20ems1public.cslab.mitel.com
	Subject: Clearspan Import: Advanced FAILED
	Attach Excel Spreadsheet
	File Name: ClearspanImportAdvancedResults {Id} {Time}xtsx
	Tags useful in the Subject and attachment File Name fields for both Success and Failure: {Id}, {Enterprise}, {Group}, {Department}, {RunCount}, {Time}, {StartTime}, {EndTime}, {Admin}
	tor, Lenerbrack, Joroph, Jockannenk, Trancoandy, Linney, Joran Inney, Tena Inney, Manniny

Figure 147: Scheduling Request: Import: Advanced

4. Select the Schedule type from the Schedule drop-down menu.

Schedule	
ochequie	
Schedule: Run Once	
Start Time: Run Once	Date and time, in 'MM/DD/YYYY HH:MM' format. Example: 11/19/2012 21:00)
Repeated	
Hourly	
Daily	
E-mail Notification Weekly	
Success: Monthly	ation of successful completion:

Figure 148: Selecting the Schedule Type

- If you selected Run Once:
 - Enter the Start Time: The date, a space, and the time (hour and minute). The Import or Export runs only one time.

	Schedule	
	Schedule:	Run Once 👻
	Start Time:	11/30/2020 05:26 (Date and time, in 'MM/DD/YYYY HH:MM' format. Example: 11/19/2012 21:00)

Figure 149: Schedule Run Once

- If you selected Repeated:
 - Enter the Initial Start Time: The date, a space, and the time (hour and minute).
 - Enter the Repeat Run: The Import or Export runs every (number of minutes).
 - Enter the Maximum Number of Runs. Leave the box blank or enter 0 if there is no limit.

Schedule	
Schedule:	Repeated 🖌
Initial Start Time:	11/30/2020 05:28 (Date and time, in 'MM/DD/YYYY HH:/MM' format. Example: 11/19/2012 21:00)
* Repeat Run:	Every 60 (minutes)
Maximum Number of Runs:	30 (Blank or 0 for no limit)

Figure 150: Schedule Repeated

- If you selected Hourly:
 - Enter the Start After time: The date, a space, and the time (hour and minute).
 - Enter an Hourly Schedule: A list of minutes within the hour. Example: 00:15, 00:45. The Import or Export runs at 15 minutes, and another at 45 minutes.
 - Enter the Maximum Number of Runs. Leave the box blank or enter 0 if there is no limit.

Schedule	
Schedule:	Hourly +
Start After:	11/30/2020 05:26 (Date and time, in 'MM/DD/YYYY HH:MM' format. Example: 11/19/2012 21:00)
* Hourly Schedule:	00:15, 00:45
	(List of minutes in the hour, in '00:MM' format, separated by commas or blanks. Example: 00:15, 00:45)
Maximum Number of Runs:	(Blank or 0 for no limit)

Figure 151: Schedule Hourly

- If you selected Daily:
 - Enter the Start After time: The date, a space, and the time (hour and minute).
 - Enter the Daily Schedule: A list of times within the day using the 24-hour clock. See the following example.
 - Enter the Maximum Number of Runs. Leave the box blank or enter 0 if there is no limit.

Schedule	
Schedule:	Daily +
Start After:	11/30/2020 05:26 (Date and time, in 'MM/DD/YYYY HH:MM' format. Example: 11/19/2012 21:00)
* Daily Schedule:	04:00, 12:00, 18:00, 20:00
	(List of times, in 'HH:MM' format, separated by commas or blanks. Example: 03:00, 21:30)
Maximum Number of Runs:	(Blank or 0 for no limit)

Figure 152: Schedule Daily

- If you selected Weekly:
 - Enter the Start After time: The date, a space, and the time (hour and minute).
 - Enter the Weekly Schedule. See the following example.
 - Enter the Maximum Number of Runs. Leave the box blank or enter 0 if there is no limit.

Schedule	
Schedule:	Weekly *
Start After:	12/07/2020 09:08 (Date and time, in 'MM/DD/YYYY HH:MM' format. Example: 11/19/2012 21:00)
* Weekly Schedule:	Recurs every 1 weeks on:
	📄 Sunday 📄 Monday 📄 Tuesday 📄 Wednesday 📝 Thursday 📄 Friday 📄 Saturday
	at the following times of the day:
	(List of times, in 'HH:MM' format, separated by commas or blanks. Example: 03:00, 21:30)
Maximum Number of Runs:	(Blank or 0 for no limit)

Figure 153: Schedule Weekly

- If you selected Monthly:
 - Enter the Start After time: The date, a space, and the time (hour and minute).
 - Enter the Monthly Schedule. See the following example.
 - Enter the Maximum Number of Runs. Leave the box blank or enter 0 if there is no limit.

Schedule	
Schedule:	Monthly
Start After:	11/30/2020 05:26 (Date and time, in 'MM/DD/YYYY HH:MM' format. Example: 11/19/2012 21:00)
* Monthly Schedule:	Months:
	🐷 January 🐷 February 🐷 March 🛛 🐷 April 🐷 May 🐨 June
	🐷 July 🐷 August 🐷 September 🐷 October 🐷 November 🐷 December
	on the following days of each month (Days separated by commas or blanks. Use 'Last' for last day of the month. If entered day is va month, it gets scheduled for the max allowed day):
	1, 12, Last
	at the following times of the day:
	08:00, 17:00, 23:30
	(List of times, in 'HH:MM' format, separated by commas or blanks. Example: 03:00, 21:30)
Maximum Number of Runs:	(Blank or 0 for no limit)

Figure 154: Schedule Monthly

5. Set up E-mail Notification parameters. E-mails are sent to the E-mail address associated with your OpEasy Admin login. For Imports or Exports that are successful and not successful, select whether to send an E-mail notification, specify the **From** address and **Subject**, and select

whether to attach a spreadsheet. See Figure 155: E-mail Notification Section - Setup for an example.

E-mail Notification	
Success:	E-mail notification of successful completion:
	To: beena.premachandran@mitel.com
	From: No-Reply@tb20ems1public.cslab.mitel.com
	Subject: Clearspan Import: Advanced
	Attach Excel Spreadsheet:
	File Name: ClearspanImportAdvancedResults_{Id}_{Time}.xlsx
Failure:	E-mail notification of failure:
r undro.	—
	To: beena.premachandran@mitel.com
	From: No-Reply@tb20ems1public.cslab.mitel.com
	Subject: Clearspan Import: Advanced FAILED
	Attach Excel Spreadsheet:
	File Name: ClearspanImportAdvancedResults {Id} {Time}.xlsx

Figure 155: E-mail Notification Section - Setup

6. Click the Start Import or Start Export button. The import or export will complete on schedule.

After you click Start, the screen refreshes and includes a Status section containing the current status of the Import.

- Click Stop to stop the schedule.
- Click OK to save changes to the schedule and exit the page.
- Click Cancel to discard the changes and exit the page.
- Click Apply to save changes to the schedule.
- Click Delete to delete the schedule.

Saved, Started	
OK Cancel	Apply Delete
Scheduling Request	Import: Advanced
Request ID:	
Creating OpEasy Admin:	
Request Creation Time:	
Enterprise:	Bulk Provisioning Lab Val, Inc
Import Spreadsheet:	ClearspanImportAdvanced_BulkProvisioning.xtsx
Status	
Status:	Waiting to start
Run Count:	
Last Refresh:	Import waiting to start 11/30/2020 05:57:14
	Stop Cancel
	Refresh
	Last Run Results
Schedule	
Schedule:	Monthly
Start After:	11/30/2020 05:26
* Monthly Schedule:	
	👿 January 🗹 February 😿 March 🛛 🐼 April 🐼 May 🐨 June
	July 👿 August 👿 September 👿 October 👿 November 👿 December on the following days of each month (Days separated by commas or blanks. Use Last' for last day of the month. If entered day is valid and > max allowed for the s
	month, it gets scheduled for the max allowed day):
	1,12,Last at the following times of the day:
	08:00,17:00,23:30
	(List of times, in 'HH:MM' format, separated by commas or blanks. Example: 03:00, 21:30)
Maximum Number of Runs:	(Blank or 0 for no limit)
E-mail Notification	
Success:	E-mail notification of successful completion:
	To: beena.premachandran@mitel.com
	From: No-Reply@tb20ems1public.cslab.mitel.com Subject: Clearscan Imcort: Advanced

Figure 156: Status Section

Viewing Scheduled Imports and Exports

The Scheduling page displays imports and exports that have been scheduled to run now or on a pre-defined schedule. You can also delete a schedule on this page.

- 1. Click **Provisioning** and then **Scheduling** in the menu tree, or click on the **Scheduling** button on the Import page. The Scheduling page opens, displaying the Scheduling Requests of the Administrator. You can select (All Enterprises) in the Enterprise drop-down box to display the scheduled imports and exports of all enterprises.
- 2. Select the Scheduled Task from the drop-down list. This filters the list of schedules.

The following example illustrates a scheduled worksheet import that has not yet started.

	edulin	g d exports that have I	been scheduled to r	un now or on a	a pre-defi	ned sche	edule.			
	ок	Cancel A	pply Refre	sh						
	Display	Administrator: Be ed Requests: ()		ab Val, Inc 👻		Waiting) Stopped OFinished			
		Last Refresh: 11/3	30/2020 07:09:33					Scheduling Requests		
Delet	Request	Task 👌	Enterprise ID 🔉	Enterprise Name 👌	Group ID ©	Group Name	Imported File / Exported Worksheets 👌	Schedule o	Admin ©	Request Status o
	118851	Import: Advanced	Bulk Provisioning	Lab Val, Inc			ClearspanImportAdvanced_BulkProvisioning.xlsx	Monthly (January,February,March,April,May,June,July,August,September,October,November,December on days: 1,12,Last at times: 08 00, 17:00,23:30)	^r Beena	Waiting to Start (Next Run: 11/30/2020 08:00:00)
							- E	nd of Scheduling Requests -		

Figure 157: Worksheet Waiting to start a Run

The following example illustrates a worksheet that failed when it was processed, and a worksheet that imported with errors.

	Scheduli Sch	00												
		na												
	Sch													
		eduled Task: (All S	Cheduled Tasks)	•										
			Provisioning Lab \	/al, Inc 👻										
		Group: (All (Broups) 👻											
	۵	dministrator: Beer	13 -											
	î	uninatiatul. Deel												
	Displaye	d Requests: All	Active / Waiting	ng OActive	Waiting	Stopp	ed 💿 Finished							
	L	ast Refresh: 11/30	2020 07:13:55											
						Sched	uling Requests							
Delete	Request	Task 👌	Enterprise ID 👌	Enterprise Name 👌	Group ID 👌	Sched Group Name o	uling Requests Imported File / Exported Worksheets o	Schedule ©	Admin	Request Status ⇔	Last Run Time 👌	Last Run Results 🌼		
)elete	Request ID \diamond 116351	Task o Export: Advanced		Enterprise Name 👌 Lab Val, Inc	Group ID 🔉	Group	Imported File / Exported				Last Run Time 👌		 <u>Results</u>	+
Delete	ID o	-	Bulk Provisioning	Name 👌	Group ID 👌	Group	Imported File / Exported Worksheets O Users,	0	0	Status 👌		Results o		
	ID ⊕ 118351	Export: Advanced	Bulk Provisioning	Name 👌 Lab Val, Inc	Group ID 🔿	Group	Imported File / Exported Worksheets Users, Voicemail	0 Now	© Beena	Status \diamond Finished	11/13/2020 03:31:22	Results o Completed	Results	
	ID ₀ 118351 112345	Export: Advanced Export: Enterprise	Bulk Provisioning Bulk Provisioning	Name o Lab Val, Inc Lab Val, Inc		Group	Imported File / Exported Worksheets o Users, Voicemail Departments OpEasy	© Now Now	0 Beena Beena	Status 👌 Finished Finished	11/13/2020 03:31:22 10/21/2020 11:00:38	Results o Completed Completed	Results Results	
	ID 0 116351 112345 112341	Export: Advanced Export: Enterprise Export: System	Bulk Provisioning Bulk Provisioning Bulk Provisioning	Name Lab Val, Inc Lab Val, Inc Lab Val, Inc	(All Groups)	Group	Imported File / Exported Worksheets • Users, Voicemail Departments OpEasy Administrators Gbl Settings - CSEngage	© Now Now	© Beena Beena Beena	Status \diamond Finished Finished Finished	11/13/2020 03:31:22 10/21/2020 11:00:38 10/21/2020 10:58:42	Results Completed Completed Completed	Results Results Results	

Figure 158: Worksheet Run Failed

- 3. Click **Refresh** to update the screen.
- 4. Click the **Results** link in the row of the schedule for which you want to see the results.



All scheduled service requests with a Never Started status are deleted after 30 days. All scheduled service requests with a Finished, Stopped, or Terminated status are deleted after 90 days.

5. Click OK to return to the Scheduling page.

Scheduling Results: Import: Advanced Display the results of a scheduled run of an Import: Advanced.						
ок						
Scheduling Request						
Scheduled Task:	Import: Advanced					
Request ID:	118895					
Creating OpEasy Admin:	shivu					
Request Creation Time:	12/01/2020 04:18:29					
Enterprise:	TestTest Shivu's Enterprise					
Import Spreadsheet:						
Results						
Results:	Completed Start Time: 12/01/2020 04:18:29					
Results ID:	1477535 End Time: 12/01/2020 04:18:30					
Run Count:	1 Results Time: 12/01/2020 04:18:30					
E-mail Users Notified:	None					
E-mail Results:	To: Shivarayappa.Kakatikar@Mitel.com					
	Attachment: 🐷 Attach Excel Spreadsheet					
	Attachment File Name: ClearspanImportAdvancedResults_{Id}_{Time}.xlsx					
Retrieve Results:	Retrieve File Name: ClearspanImportAdvancedResults_(Id)_(Time).xlsx					
	(Useful tags for File Names: {Id}, {Enterprise}, {Time}, {StartTime}, {EndTime}, {Admin})					
	Retrieve Results					
	E-mail Results					
	Delete					
Details:	Tere Clearspan Import: Advanced ***					
	Enterprise: TestTest Shivu's Enterprise					
	Scheduling: Request ID: 118895					
	Started: 12/01/2020 04:18:29 Finished: 12/01/2020 04:18:30					
	THINITUA. TELYTEVES VT. 19.3V					
	SUCCESSFUL: Import: Advanced completed successfully.					

Figure 159: Scheduling Results – Import

Restarting a Scheduled Import or Export

- 1. From the main menu, select **Provisioning** and then **Scheduling**.
- 2. Click on the Edit link at the end of the row or click anywhere in the row of the schedule you want to edit. The Scheduling Request page opens. The spreadsheet content is already specified. The status is marked as "Finished".
- 3. Click Restart Import or Restart Export. The Import or Export restarts.

Deleting a Scheduled Import

- 1. From the main menu, select **Provisioning** and then **Scheduling**.
- 2. Select the **Delete** box beside the schedule(s) to delete.
- 3. Click Apply or OK. The schedule(s) are deleted from the list.

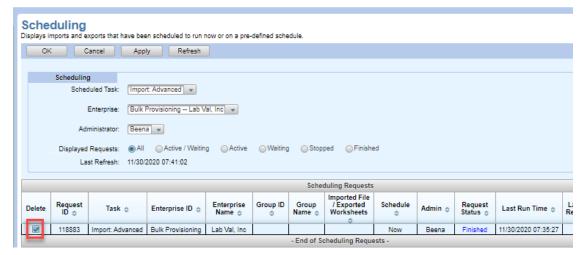


Figure 160: Scheduling Page – Delete

Enterprise Settings

The Enterprise Settings pages allow you to configure the departments in an Enterprise, add or change the phone numbers assigned to an Enterprise, and configure Service Packs within an Enterprise.

Adding Enterprise Departments

- 1. You can use Enterprise Settings to add new departments for an Enterprise.
- 2. From the main menu, select **Provisioning** and then **Enterprise Settings**.
- 3. Select Departments.
- 4. Select the Enterprise from the drop-down list.
- 5. Click Add. The Enterprise Departments Add page opens.
- 6. Enter a Department Name and Parent Department.
- 7. Click OK.

Modifying or Deleting Enterprise Departments

- 1. From the main menu, select **Provisioning** and then **Enterprise Settings**.
- 2. Select Departments.
- 3. Select the Enterprise from the drop-down list.
- 4. Click Search to display all Departments, or enter search parameters to filter your search.
- 5. Click on the **Edit** link at the end of the row or click anywhere for any Department you want to edit. The Department Modify page opens.
- 6. Click Delete to delete the Department, or make any desired changes and click OK.

Selecting the Available Device Types for an Enterprise

You can limit the list of device types available in an enterprise. Then only those device types appear in menus when creating a device, displaying or modifying Phone Templates, selecting Phone Manufacturer for Global Settings, and so on.

Removing a device type from the list prevents access to any existing phone templates for that device type, even if they are in use by existing phone devices. It is best to remove any existing phone devices and templates before removing the associated device type from an enterprise.

- 1. From the main menu, select Provisioning and then Enterprise Settings.
- 2. Select Device Types. The Enterprise Device Types page opens.
- Select the Enterprise from the drop-down list. If you have administrator access to more than one enterprise, you can select (Multiple Enterprises) to add or remove device types for more than one enterprise at a time.
- 4. If you selected one enterprise,

•

- To remove device types from the enterprise, move them to Available Device Types.
- To add device types for use by the enterprise, move them to Enterprise Device Types.

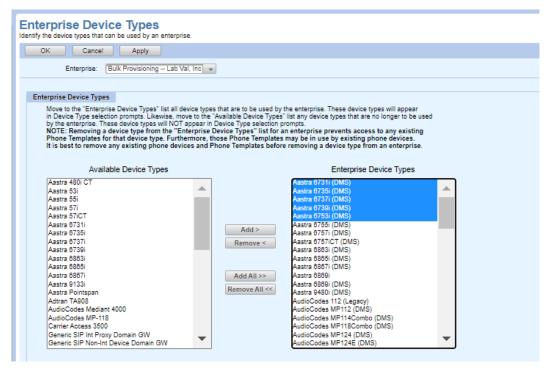


Figure 161: Enterprise Device Types Page

- If you selected Multiple Enterprises, choose one or more enterprises to move from Available Enterprises to Selected Enterprises.
 - To remove device types from the chosen enterprises, select device types from Available Device Types and move them to Device Types To Remove.
 - To add device types for use by the chosen enterprises, select device types from Available Device Types and move them to Device Types To Add.
 - To use a specific set of device types for all of the chosen enterprises, select device types to use from Available Device Types and move them to Device Types To Add. Then, move all of the remaining devices types from Available Device Types to Device Types To Remove.

Enterprise Device Types			
OK Cancel Apply			
Enterprise: ((Multiple Enterprises))			
Enterprise Device Types - Select one or more enterprises to change from the "Available Enterprise" list - To annot device types from use for the chosen enterprises, select device type - To add device types for use by the chosen enterprises, select device types - To use specific ser of device types for all of the chosen enterprises, select Them, move all of the remaining devices types from the "Available Device Type NOTE: Removing a device type from use by an enterprise prevents access It is best to remove any existing phone devices and Phone Templates before	pes from the "Available Device Types" list an om the "Available Device Types" list and mov levice types to use from the "Available Devic es" list to the "Device Types To Remove" list is to any existing Phone Templates for the	Id move them to the "Device Types To Remove" ve them to the "Device Types To Add" list. ve Types" list and move them to the "Device Typ t. at device type. Furthermore, those Phone Te	es To Add" list.
Available Enterprises		Selecter	d Enterprises
AastarGanada AomeOorp - Road Runner's Aome Bulk Provisioning - Lab Val, Ino CalCenterTesting - Co Testing clearspaniab - Clearspan LAB Englabfast - Englenein Lab Testing Hawkins - Marry's Enterprise hawkins 1 India - Mitel India Lab India Dev - India Dev Kathieen Lab - Katheen's Lab Margono - May Township, Lee County Mitel Labs - Marel Labs Morobouse - More Enterprises of Texas Nappix - Neets Nappix PhoneIntab - Fano Finne Integration Lab	Add> Remove < Add All >> Remove All <<		•
Device Types To Remove	Available Device Typ	es	Device Types To Add
Add > Remove < Add All >> Remove All <<	Pactra 420 CT Astra 53 Astra 55 Astra 57 Astra 57 Astra 673 Astra 6731 Astra 6731 Astra 6731 Astra 6731 Astra 6731 Astra 6731 Astra 6737 (DMS) Astra 6736 (DMS) Astra 6737 (DMS) Astra 6736 (DMS) Astra 6757 (DMS) Astra 67	Add> Remove < Add All>> Remove All <<	•

Figure 162: Enterprise Device Types Page – Multiple Enterprises

6. Click OK.

Configuring Custom Device Type Tags for an Enterprise

You can add, modify, and delete custom tags for devices of a specified device type in a selected enterprise. A tag can be created for any device type supported by OpEasy and any other device type for Mitel and Polycom phones even though those device types are not supported by OpEasy.

- 1. From the main menu, select **Provisioning** and then **Enterprise**.
- 2. Select Device Type Tags.
- 3. Select the Enterprise from the drop-down list, if necessary. If you have administrator access to more than one Enterprise, you can select (Multiple Enterprises) to add or remove device types for more than one Enterprise at a time.
- 4. Select the Device Type.
- 5. Click Add to add a new tag, or click Edit at the end of the row for any tag you want to edit. The Enterprise Device Type Tag page opens.
- 6. Enter a Tag Name and Tag Value, change the Tag Value, or click Delete to remove the custom tag.
- 7. Click OK.

Adding Enterprise Music On Hold Profiles

You can use Enterprise Settings to add new Music On Hold (MOH) profiles for groups, departments, and users in the Enterprise. If no user MOH settings are configured, group MOH settings are used; if no group MOH settings are configured, enterprise MOH settings are used. MOH profiles are available to Solution Resellers, but not to Enterprise, Group, or Department Administrators. The Music On Hold service must be assigned.

- 1. From the main menu, select **Provisioning** and then **Enterprise Settings**.
- 2. Select Music On Hold (MOH) Profiles.
- 3. Select the Enterprise from the drop-down list, and then select Profile Type.
- 4. Click Add. The Music On Hold Profile Add page opens.
- 5. Enter a Name and Description. The name must be 1-80 characters. The description is optional.
- 6. Follow these steps if a Group profile type is being added:
 - **a.** Choose the types of calls to **Enable music during**. Music On Hold can be enabled for calls on hold, parked calls, and busy camped-on calls.
 - **b.** Select a Preferred Audio Codec and Music Source.
 - c. For External Device Settings, select a device if **Music Source** is set to **External Device**.
 - d. Enter the Line Port, Port Number, and SIP Contact of the external device.
- 7. Follow these steps if a User profile type is being added:
 - a. Enable or disable Music on Hold
 - **b.** Select a Music Source.
- 8. Enter an Announcement Name and a value for Load Audio/Video File if you chose to add a custom announcement.
- **9.** To configure the group's music on hold to be different for internal and external calls, select the **Use Alternate Source** box and configure the Internal Calls Settings.
- **10.** Click **OK**.

Modifying or Deleting Enterprise MOH Profiles

- 1. From the main menu, select **Provisioning** and then **Enterprise Settings**.
- 2. Select Music On Hold (MOH) Profiles.
- 3. Select the Enterprise from the drop-down list and select the Profile Type.
- **4.** Click on the **Edit** link at the end of the row or click anywhere for any profile you want to edit. The Music On Hold Profile Modify page opens.
- 5. Make changes to the profile, or click **Delete** to delete the profile.
- Click Initialize Group/Department Settings to update selected Music On Hold settings for the selected groups/departments to be updated based on the contents of the Music On Hold profile being edited.
- 7. Click OK.

Configuring Custom Device Type Tags

You can add, modify, and delete custom tags for devices of a specified device type in the selected groups of an Enterprise.

- 1. From the main menu, select **Provisioning** and then **Enterprise**.
- 2. Select Device Type Tags.
- 3. Select the Enterprise from the drop-down list, if necessary.
- 4. Select the **Device Type**.
- 5. Click Add to add a new tag, or click Edit at the end of the row or click anywhere for any tag you want to edit. If there are several tag values for one tag name (in multiple groups), the "Multiple Values" hyperlink appears, which you can click to view the list, and then click Edit.

The Enterprise Device Type Tags page opens.

- 6. Enter a **Tag Name** and **Tag Value**, change the **Tag Value**, or click **Delete** to remove the custom tag.
- 7. Click Add or Remove to choose the Assigned Groups for the enterprise device type tags.
- 8. Click OK.

Adding Phone Numbers to an Enterprise

You can use Enterprise Settings to add phone numbers assigned to an Enterprise.

- 1. From the main menu, select **Provisioning** and then **Enterprise Settings**.
- 2. Select Phone Numbers.
- 3. Select the Enterprise and Group from the drop-down lists.
- 4. Click Add. The Enterprise Phone Number Add page opens.
- 5. Select a group from the **Assign to Group** drop-box, and choose whether to activate the phone numbers.
- 6. Enter the ranges of phone numbers to add to the Enterprise.
- 7. Click OK.

Viewing or Modifying the Enterprise Phone Numbers

- 1. From the main menu, select **Provisioning** and then **Enterprise Settings**.
- 2. Select Phone Numbers. The Enterprise Phone Numbers page opens.
- 3. Select the Enterprise and the Group from the drop-down lists.
- 4. Click the Include Enterprise Phone Numbers When Selecting a Phone Number for a User check box, if you want to include enterprise phone numbers in the list of available phone numbers that are to be selected when provisioning users, auto attendants, or hunt groups.

When this check box is selected, the phone numbers that are assigned to the enterprise (but not to a group) are included in the phone number selection list appended with "(Enterprise)" to

indicate that the phone number is not currently assigned to the group. When an enterprise phone number is selected for a user, and the user information is saved, the phone number is automatically assigned to the appropriate group.

- 5. Choose how to display Phone Number Ranges:
 - Displayed by Group: When this check box is selected, the display expands to show the group to which each phone number or range is assigned; the Group column is empty if the phone numbers or ranges are only assigned to the Enterprise. When this check box is not selected, "(Multiple)" is displayed in the Group column if phone numbers in the range are assigned to different groups or are assigned to the Enterprise. Clear this box if you want to view ranges of phones numbers in the Enterprise, without regard to the group assignments.
 - Displayed by Assigned to User: When this check box is selected, the display expands to show whether each phone number or range has users assigned. When this check box is cleared, "+" is displayed in the Assigned to User column if some phone numbers in the range are assigned to a user while others are not. Clear this box if you want to view ranges of phones numbers in the Enterprise, without regard to user assignments.
 - Displayed by Activated: When this check box is selected, the display expands to show whether phone numbers have been activated. When this check box is not selected, "+" is displayed in the Activated column if some phone numbers in the range have been activated while others have not. Clear this box if you want to view ranges of phones numbers in the Enterprise, without regard to whether they have been activated.
- 6. To edit a phone number range, click the **Edit** link at the end of the row or click anywhere for any phone number range you want to edit. The Enterprise Phone Number Modify page opens, showing the Enterprise, Phone Number and the group assigned. Click **Activated** or **Deactivated** to activate or deactivate the phone number and click **OK**.
- 7. Click **OK** again to save the changes.

Adding a Service Pack

You can use Enterprise Settings to create Service Packs for an Enterprise, choosing which features to include and specifying a name for the pack.

- 1. From the main menu, select **Provisioning** and then **Enterprise Settings**.
- 2. Select Service Packs.
- 3. Select the Enterprise and Group from the drop-down lists.
- 4. Click Add. The Service Pack Add page opens.

You can also search for an existing Service Pack and click the Copy link to create a new Service Pack based on that one, and then modify it.

OK Cancel			
Enterprise: Bulk Provisioning	Lab Val, Inc		
Service Pack Name:			
Service Pack Description:			
Availability: 📝 Available for	Use		
Services			
Select Services to be included in Service Pack			
Available Services		Services In Pack	
Alternate Numbers Anonymous Call Rejection Automatic CallBack Automatic HollBack Barge-in Exempt Basic Call Logs Busy Lamp Field Call Center Wonitoring Call Center User - Basic Call Center User - Premium Call Center User - Premium Call Center User - Standard Call Fortwarding Always Call Fortwarding Always Call Fortwarding Busy Call Fortwarding Busy Call Fortwarding No Answer	Add > Remove < Add All >> Remove All <<		

Figure 163: Service Pack Add Page

- 5. Enter a Service Pack Name and Service Pack Description.
- 6. Select the Available for Use check box when the Service Pack is ready for use.
- 7. Use the Add and Remove buttons to select the features to include in the pack.
- 8. Click OK.

Modifying or Deleting a Service Pack

- 1. From the main menu, select Provisioning and then Enterprise Settings.
- 2. Select Service Packs.
- 3. Select the Enterprise and Group from the drop-down lists.
- 4. Click Search to display all Service Packs, or enter search parameters to filter your search.
- 5. Click on the Edit link at the end of the row or click anywhere for any Service Pack you want to edit. The Service Pack Modify page opens.

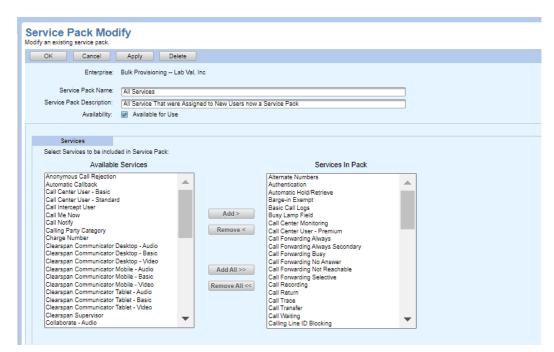


Figure 164: Service Pack Modify Page

6. Click Delete to delete the Service Pack, or make any changes and click OK.

Authorizing Groups to Use a Service Pack

- 1. From the main menu, select Provisioning and then Enterprise Settings.
- 2. Select Service Packs.
- 3. Select the Enterprise and Group from the drop-down lists.
- 4. Click **Search** to display all Service Packs, or enter search parameters to filter your search.
- 5. Click the **Authorize** link on the row for any Service Pack you want to authorize. The Service Pack Group Authorization page opens.
- 6. Select the check boxes beside each group that you want to authorize for this Service Pack.
- 7. Click OK.

Configuring the Voice VPN

You can use OpEasy to add, view, modify and delete the Voice VPN settings for a selected enterprise, and search for existing Voice VPN entries. Only one location code and one policy selector can be included in the search criteria.

Only Enterprise Administrators and above can configure the Voice VPN.

Viewing and Searching Voice VPN Entries

To view, and search existing Voice VPN entries:

- 1. From the main menu, select Provisioning and then Enterprise Settings.
- 2. Select Voice VPN. The Voice VPN page displays:

Voice VPN Add or modify voice VPN in an enterprise.							
OK Cancel Apply Add							
Enterprise: Bulk Provisioning Lab Val, Inc -							
Status: ON OFF Default selector: Public Private Selector for non-matching E184 numbers: Public Default Selector Route using: Called numbers only Called number and phone-context Voice VPN Search: Search (Ally Contains: Contains							
	Voice VPN Entries						
Location Code 👌	Min Extension Length 👌	Max Extension Length 👌	Selector 🗇	Edit			
1111	1	12	Private	Edit			
1122	3	15	Public	Edit			
2211	3	15	Public	Edit			
3321	3	32	Private	Edit			
45	10	11	Private	Edit			

Figure 165: Voice VPN Page

- 3. Select the Enterprise. The existing Voice VPN Entries displays.
- 4. You can search for Voice VPN entries using the Location Code and Selector filters.
- 5. Click Search. The search results display in the Voice VPN Entries table.

Configuring Voice VPN Settings

To configure the Voice VPN settings:

- 1. From the main menu, select Provisioning and then Enterprise Settings.
- 1. Select Voice VPN. The Voice VPN page displays.
- 1. Select the Enterprise.
- **1.** Enable the Status and select the Default selector and the Selector for non-matching E164 numbers.
- 1. Select the options for the Voice VPN Routing.
- 1. Click OK or Apply.

Adding Voice VPN Entries

To add a new voice VPN entry:

- 1. From the main menu, select **Provisioning** and then **Enterprise Settings**.
- 2. Select Voice VPN. The Voice VPN page displays.
- Click Add to add a new Enterprise Voice VPN entry, the Enterprise Voice VPN Add page displays:

Enterprise Add a new enterprise	Voice VPN voice VPN.	Add							
ОК	OK Cancel								
Enterprise: Bulk Provisioning Lab Val, Inc									
VPN Settir	ngs								
*Loc	cation Code:								
Min Extens	sion Length: 0	Enter a number between 0 - 100							
Max Extension Length: 0 Enter a number between 0 - 100									
	Description:								
	Selector: Priva								
la dan	0	U.L.							
Index	Operation None +	Value							
2	None -								
3	None -								
4	None 👻								
5	None 👻								
6	None 👻								

Figure 166: Enterprise Voice VPN Add Page

- 4. Enter the Location code.
- 5. Enter the Minimum Extension Length in the range of 1 to 100.
- 6. Enter the Maximum Extension Length in the range of 1 to 100.
- 7. Enter the **Description**.
- 8. Choose the Selector option from the following:
 - Private
 - Public
 - Route
 - Treatment
- 9. Select the **Operation** from the **Digit Manipulation** table and enter the **Value** for each Operation.
- 10. Click OK.

Editing Voice VPN Entries

To edit a voice VPN entry:

- 1. From the main menu, select **Provisioning** and then **Enterprise Settings**.
- 2. Select Voice VPN. The Voice VPN page displays.
- 3. Click Edit in the Voice VPN Entries table, or click anywhere in the row of the Voice VPN Entry, the Enterprise Voice VPN Modify page displays:

Enterprise Voice VPN Modify Modify an existing enterprise Voice VPN.					
OK Ca	ancel Appl	ly Delete			
Ente	erprise: Bulk Prov	visioning Lab Val, Inc			
VPN Settings	5				
* Locati	tion Code: 2211				
Min Extensio	on Length: 3	Enter a number between 0 - 100			
Max Extensio	on Length: 15	Enter a number between 0 - 100			
De	escription: Test				
	Selector: Public				
Index	Operation	Value			
	Left Trim 🔹	GREAT1#			
	Trim	GREATER1#			
	Right Trim	GREATEST1#			
	None -				
1					

Figure 167: Enterprise Voice VPN Modify Page

- 4. Enter the Minimum Extension Length in the range of 1 to 100.
- 5. Enter the Maximum Extension Length in the range of 1 to 100.
- 6. Enter the **Description**.
- 7. Choose the **Selector** option from the following:
 - Private
 - Public
 - Route
 - Treatment
- 8. Select the **Operation** from the **Digit Manipulation** table and enter the **Value** for each Operation.
- 9. Click OK or Apply.

Deleting Voice VPN Entries

To delete a Voice VPN Entry:

- 1. From the main menu, select Provisioning and then Enterprise Settings
- 2. Select Voice VPN. The Voice VPN page displays.
- 3. Click Edit in the Voice VPN Entries table, or click anywhere in the row of the Voice VPN Entry to edit an existing Enterprise Voice VPN entry, the Enterprise Voice VPN Modify page displays.
- 4. Click **Delete**. The Enterprise Voice VPN entry is deleted.

Group Settings

The Group Settings pages allow you to use custom tags for devices in a group, redirect calls within a group during specified time periods, and manage phone directory servers for an enterprise or group.

Adding or Deleting Group Announcements

OpEasy allows you to upload, delete, or configure audio or video announcement files to repositories. Announcements repositories are kept for Users, Auto Attendant and Hunt Group virtual users, and Groups. Once an announcement is saved to a repository, OpEasy allows you to assign it to Voice Mail Greetings, Auto Attendant menus, and Music On Hold. You can search, upload, rename, or delete announcements for a group on the Group Announcement Repository page. You can also use this page to view announcement types, size, and usage.

- 1. From the main menu, select **Provisioning** and then **Group**.
- 2. Select Announcement Repository.
- 3. Select the Enterprise and Group from the drop-down list, if necessary.
 - To upload a new file, click Add. Enter an Announcement Name, and click Browse to choose the audio or video file to upload. Supported file types include WAV, WMA, MOV, or 3GP. Click OK. The new announcement appears in the Announcements list.
 - To rename or replace an announcement, search for the announcement. Search results appear in the list at the bottom of the page. Click Edit on the row of the announcement you want to modify. Make any desired changes on the Group Announcement Modify page, and then click OK.
 - To delete an announcement, select it in the search results list and click Delete Selected Announcements, or click Delete on the Group Announcement Modify page. You cannot delete announcements that are in use.
- 4. Click OK.

Adding or Deleting Group Authorization Codes

You can add, modify, or delete group authorization codes.

- 1. From the main menu, select **Provisioning** and then **Group Settings**.
- 2. Select Authorization Codes.
- 3. Select the Enterprise and Group from the drop-down list, if necessary. The Group Communication Barring Authorization Codes page opens as shown in the following figure:

		rring Authorization Codes ization codes in the selected group.							
ОК	OK Cancel Apply Add								
Enter	Enterprise: Bulk Provisioning Lab Val, Inc] +								
G	Group: Group_G - Group, Gewel +								
Automatic Rese	t Settings								
Auth Code Auto F	Auth Code Auto Reset: 📃 Enable automatic reset of selected authorization codes for the group.								
Auth Code L	ength: 4 👻								
Reset Frequ	Jency: 1 Days (1-99)	Le la construcción de la const							
Reset	Time: 11:00am 👻 (GM	T-06:00) (US) Central Time							
Email Addre	esses: dru.nelson@mitel.com	n, drun@asmos.net (Comma separated list of email addresses	5)						
	Send Current Auth	Codes							
		14 <4 1 2 33 3							
Auto Reset	Authorization Code 👌	Description 👌	Delete						
	000123	DeleteMe	Delete						
	00345	TabTest?	Delete						

Figure 168: Group Communication Barring Authorization Codes

- 4. To automatically reset the selected authorization codes for the group, configure the following settings in the **Automatic Reset Settings** table:
 - **a.** Select the **Auth Code Auto Reset** check box to automatically reset the selected authorization codes. The Auth Code Auto Reset is disabled by default.
 - **b.** Select the **Auth Code Length** of the automatically generated authorization codes. The valid authorization code length contains 2 to 14 digits. The default value contains 4 digits.
 - **c.** Enter the **Reset Frequency** to specify the frequency (number of days) in which the authorization codes are to be reset. The valid reset frequency is 1 to 99 days. The default reset frequency is 1 day.
 - **d.** Select the time of day that the authorization codes are to be reset from the **Reset Time** drop-down list. The drop-down list contains options from 12:00am to 11:00pm. The default reset time is 12:00am
 - e. Enter the Email Addresses to which the new authorization codes are delivered when they are reset.
 - **f.** Click **Send Current Auth Codes** to send an email on demand which contains the currently configured authorization codes. Only the authorization codes selected for Auto Reset are included in the email.
- 5. To add a new group-level Communication Barring Authorization Code, click Add, click Auto Reset to automatically reset the authorization code when is a group is configured for automatic reset of authorization codes. The checkbox is not selected by default when a new authorization code is added. Enter the Authorization Code, Description, and Click OK.
- 6. Click **Delete** at the end of the row if you want to remove an authorization code.
- 7. Click OK.

Configuring Call Pickup Groups

- 1. You can configure the call pickup to enable users to answer any ringing line in their call pickup group.
- 2. From the main menu, select **Provisioning** and then **Group**.
- 3. Select Group Call Pickup.
- 4. Select the Enterprise and Group from the drop-down list, if necessary.
- 5. Click Add to add a new group, or click Edit link at the end of the row or click anywhere for any group you want to edit.
- **6.** Select a name for the group, and configure the group by adding or removing users. You can also click **Delete** to remove the group.
- 7. Click OK.

Configuring Group Departments

You can configure the departments in a group.

- 1. From the main menu, select **Provisioning** and then **Group**.
- 2. Select Group Departments.
- 3. Select the Enterprise and Group from the drop-down list, if necessary.
- 4. Click Add to add a new department, or click Edit at the end of the row or click anywhere for any department you want to edit. You can also click Edit and then Delete if you want to remove the department.
- **5.** Enter a Department Name.
- **6.** Configure the Department Calling Line ID Name and Department Calling Line ID Number, if needed.
- 7. Click OK.

Configuring Custom Device Type Tags for a Group

You can add, modify, and delete custom tags for devices of a specified device type in a selected group.

- 1. From the main menu, select **Provisioning** and then **Group**.
- 2. Select Group Device Type Tags.
- 3. Select the Enterprise and Group from the drop-down list, if necessary.
- 4. Select the **Device Type**.
- 5. Click Add to add a new tag, or click Edit at the end of the row or click anywhere for any tag you want to edit. The Group Device Type Tags page opens.
- 6. Enter a Tag Name and Tag Value, change the Tag Value, or click Delete to remove the custom tag.

7. Click OK.

CONFIGURING Target capacity for a paging group

You can configure the Target Capacity per Paging Group.

- 1. From the main menu, select **Provisioning** and then **Group Settings**.
- 2. Select Group Paging.
- 3. Select the Enterprise and Group from the drop-down list. It displays the Group Paging Target Capacity for this group.
- 4. Enter the **Maximum number of Target Users per Paging Group for this Group** that should not exceed the value configured for enterprise. Number of targets also includes nested targets of paging group.
- 5. Click OK

Configuring Music On Hold (MOH) for a Group

You can use Group Settings to add new Music On Hold profiles for groups or departments within a group. If no user MOH settings are configured, group MOH settings are used; if no group MOH settings are configured, enterprise MOH settings are used. MOH profiles are available to Solution Resellers, but not to Enterprise, Group, or Department Administrators. The Music On Hold service must be assigned.

- 1. From the main menu, select **Provisioning** and then **Group**.
- 2. Select Music On Hold.
- 3. Select the Enterprise and Group from the drop-down list, if necessary.
- 4. Search for a Music On Hold Type to edit, or click Add to create a new Music On Hold Type.
- 5. Select a **Music On Hold Profile** if you want to base these group settings on an existing enterprise-level MOH profile.
- 6. Choose the types of calls to **Enable music during**. Music On Hold can be enabled for calls on hold, parked calls, and busy camped-on calls.
- 7. Select a Preferred Audio Codec and Music Source.
- 8. For External Device Settings, select a device if **Music Source** is set to **External Device**. Enter the Line Port, Port Number, and SIP Contact of the external device.
- 9. If Music Source is set to Custom Announcement, select an Audio Announcement or Video Announcement from the Group Announcement Repository.
- **10.** To configure the group's music on hold to be different for internal and external calls, select the **Use Alternate Source** box and configure the Internal Calls Settings.
- 11. Click OK.

Configuring Night Forwarding

You can redirect calls placed to a user within the group to a specified phone number or SIP-URI. You can configure the redirection manually by enabling the feature, or you can configure it to be automatic by choosing a specific schedule. The Night Forwarding feature must be authorized for the group.

- 1. From the main menu, select **Provisioning** and then **Group**.
- 2. Select Group Night Forwarding.
- 3. Select the Enterprise and Group from the drop-down list, if necessary.
- Set Group Night Forwarding to On to enable this feature manually, or set it to Scheduled to choose specific Business Hours or a Holiday Schedule during which to forward calls made to this group.
- 5. Enter the Forward-To Number.
- 6. Click OK or Apply.

Configuring Phone Directory Management

Phone Directory Management allows management of Lightweight Directory Access Protocol (LDAP) phone directories for enterprises and groups. There can be one directory for an enterprise or a different directory for each group. This configuration supports the LDAP lookup key on the phone.

Adding a Phone Directory Server

- 1. From the main menu, select **Provisioning** and then **Group Settings**.
- 2. Select Phone Directory Management.
- 3. Select the Enterprise and Group from the drop-down list, if necessary.
- **4.** Choose to Use one directory for the enterprise (all groups), or to Use a separate directory for each group.
- 5. Click Apply. Click OK.
- 6. Click Add to add a phone directory when *Use a separate directory for each group* is selected. The Phone Directory Management Add page opens.
- 7. Select the **Enabled** box.
- 8. Enter the Server URI, Server RootDN, Server UserId, Server Password and Confirm Server Password.
- 9. Choose whether the Query will **Remove Extensions from Results**, and select whether to **Disable Workphone Search**.
- **10.** The **Field Mapping** section displays default values, but you can change any of the following if you want: Last Name Field, First Name Field, Work Phone Field, Home Phone Field, Cell Phone Field, ID Field, Sort Field, Append Field, Additional Search Field.
- **11.** Click **OK**. The Phone Directory Management page opens, displaying the new LDAP setup.

Testing LDAP

- **1.** Use Phone Templates to add an LDAP Lookup button to a template.
- 2. Assign the template to a phone.
- **3.** Press the LDAP button on the phone.
- 4. The Directory Lookup message should display.
- 5. Perform lookups to test the searches.

Editing a Phone Directory Server

- 1. From the main menu, select **Provisioning** and then **Group**.
- 2. Select Phone Directory Management.
- 3. Select the Enterprise and Group from the drop-down list, if necessary.
- **4.** Click the **Edit** link in the first column or last column of the display. The Phone Directory Modify page opens. You can modify any of the columns.
- 5. Click OK or Apply.

Deleting a Phone Directory Server

- 1. From the main menu, select **Provisioning** and then **Group**.
- 2. Select Phone Directory Management.
- 3. Select the Enterprise and Group from the drop-down list, if necessary.
- **4.** Click on the **Edit** link in the first column or the **Edit** link in the last column of the display. The Phone Directory Modify page opens.
- 5. Click the **Delete** button. The delete warning dialog box opens.
- 6. Click OK. The server is deleted.

Viewing or Assigning Group Phone Numbers

- 1. From the main menu, select **Provisioning** and then **Group Settings**.
- 2. Select Phone Numbers.
- 3. Select the Enterprise and Group from the drop-down lists.
- 4. Choose how to display Phone Number Ranges:
 - Displayed by Assigned to User: When this check box is selected, the display expands to show whether each phone number or range has users assigned. When this check box is cleared, "+" is displayed in the Assigned to User column if some phone numbers in the range are assigned to a user while others are not. Clear this box if you want to view ranges of phones numbers in the Group, without regard to user assignments.
 - Displayed by Activated: When this check box is selected, the display expands to show whether phone numbers have been activated. When this check box is cleared, "+" is displayed in the Activated column if some phone numbers in the range have been activated while others have not. Clear this box if you want to view ranges of phones numbers in the Group, without regard to whether they have been activated.

- 5. You can use the **Displayed by Assigned to User** or **Displayed by Activated** check boxes to change how the phone numbers are displayed.
- 6. To edit a phone number range, click the **Edit** link at the end of the row or click anywhere for any phone number range you want to edit. The Group Phone Number Modify page opens. Make any required changes and click **OK**.
- 7. Click **OK** again to save the changes.

Assigning Phone Numbers to a Group

You can use Group Settings to manage phone numbers assigned to a Group.

- 1. From the main menu, select **Provisioning** and then **Group Settings**.
- 2. Select Phone Numbers.
- 3. Select the Enterprise and Group from the drop-down lists.
- 4. Click Assign. The Group Phone Number Assign page opens.
- 5. Choose whether to activate the phone numbers.
- 6. Choose Available Ranges and click Add to make them Available Phone Numbers. Then choose from the available numbers and click Add to make them Selected Phone Numbers for assigning to the Group.
- 7. Click OK.

Configuring a Predefined Speed Dial 8 List

You can use Group Settings to configure a predefined Speed Dial 8 list that can be assigned to users.

- 1. From the main menu, select **Provisioning** and then **Group Settings**.
- 2. Select Speed Dial 8 Lists.
- 3. Select the Enterprise and Group from the drop-down lists.
- 4. Click Add. The Group Speed Dial 8 List Add page opens.
- 5. Enter a Name for the Speed Dial List, which is required and can be up to 80 characters long
- 6. Optionally, you can enter a **Description** up to 300 characters long.
- 7. Enter a **Phone Number/SIP-URI** for each Speed Code you want to define. Enter a phone number as you would normally dial it.
- 8. Click OK.

Configuring a Predefined Speed Dial 100 List

You can use Group Settings to configure a predefined Speed Dial 100 list that can be assigned to users.

- 1. From the main menu, select **Provisioning** and then **Group Settings**.
- 2. Select Speed Dial 100 Lists.

- 3. Select the Enterprise and Group from the drop-down lists.
- 4. Click Add. The Group Speed Dial 100 List Add page opens.
- 5. Enter a Name for the Speed Dial List, which is required and can be up to 80 characters long.
- 6. Optionally, you can enter a Description up to 300 characters long.
- 7. Click Add Speed Dial 100. The Group Speed Dial 100 Entry Add page opens.
- 8. Select the **Speed Code 100** number that you want to define, and enter a **Name/Description** and **Phone Number/SIP-URI**. Enter a phone number as you would normally dial it.
- 9. Click OK.

Assigning Predefined Speed Dial Lists to Users

After a Speed Dial 8 or Speed Dial 100 List has been defined, you can use Group Settings to assign the Speed Dial list to selected users.

- 1. From the main menu, select **Provisioning** and then **Group Settings**.
- 2. Select the type of predefined list that you want to assign to users: Speed Dial 8 Lists or Speed Dial 100 Lists.
- 3. Select the Enterprise and Group from the drop-down lists.
- 4. Click on the **Edit link** at the end of the row or click anywhere on the row of the Speed Dial List that you want to assign to users.
- 5. On the Group Speed Dial List Modify page, click Initialize User Speed Dial Settings.
- **6.** On the Group Speed Dial List: Initialize User Settings page, search for users, and then select the check box for each user to which you want to assign the Speed Dial List.
- 7. Click Initialize Selected Users.
- 8. Click OK.

Configuring Virtual Extensions

You can use Group Settings to configure virtual on-net extensions for an Enterprise.

- 1. From the main menu, select **Provisioning** and then **Group Settings**.
- 2. Select Virtual Extensions.
- 3. Select the Enterprise and Group from the drop-down lists.
- 4. Search for a Virtual Extension to edit, or click **Add** to create a new Hunt Group.
- 5. Click Add. The Virtual On-Net Enterprise Extension Add page opens.
- 6. Enter an **External Phone Number**, a valid phone number not already in use by another Virtual On-Net User or assigned to a user in the Enterprise.
- 7. Enter a valid **Extension** not already in use by another Virtual On-Net User or assigned to a user in the Enterprise.

- 8. Enter a valid Last Name and First Name for the directory. Enter a Calling Line ID Last Name and Calling Line ID First Name for displaying the name in internal calls.
- 9. Select a Virtual On-Net Call Type from the list of system-defined types.
- **10.** Click **OK**.

Administrative Tools

Managing OpEasy Licenses

Licensing Allocation for Users and Third Party Phones

OpEasy tracks the maximum number of users and third party phones that administrators are allowed to manage using OpEasy. Solution Reseller administrators can allocate the system user licenses and 3rd Party licenses to their Enterprises as needed. If an administrator attempts to add or modify users or third party phones beyond the set number of licenses, OpEasy aborts the operation and displays an error message.

Note: If any Group in Clearspan has user limit set to less than 100, OpEasy automatically sets it to 5000, the maximum number of users for a group. This prevents errors when adding users in OpEasy.

Configuring License Allocations

System Administrators, and Solution Resellers who have full access to licensing privileges can use the OpEasy Licensing page to allocate OpEasy Licenses for both users and third party phones to the various Enterprises.

1. From the main menu, select Administrative Tools and then Licensing and OpEasy License Allocation.

The OpEasy License Allocation page opens. It shows the total number of OpEasy user and third party phone licenses, as well as how many are unallocated. **Total Available** is the total number of unused and available OpEasy licenses (User or Third Party Phone), including any licenses manually allocated to one or more enterprises but that have not been used by those enterprises. **Available for Auto** is the number of unused and available OpEasy licenses (User or Third Party Phone) but does NOT include any unused and available licenses that are manually allocated to one or more enterprises. **Available for Auto** is the number of unused and available licenses that are manually allocated to one or more enterprises. **Available for Auto** identifies the number of OpEasy licenses that can be used by an Enterprise setup for automatic ("Auto") allocation, which cannot and does not include any available licenses reserved for other Enterprises through the use of Manual allocation.

2. In the Enterprise Allocations table, set User Licenses Allocation to Auto or Manual for each Enterprise. Auto ensures that the license allocation always matches the total phones provisioned for proper support, and each time a new phone is added, the allocation is increased unless system licenses have been exhausted.

For any Enterprise using Manual license allocation, set the number of Allocated user and Third Party phone licenses for each Enterprise. The number of Available licenses updates when you click Refresh. The Clearspan User Count and Clearspan ThirdParty Phone Count columns show the total number of licensed users and third party phones within Clearspan for that Enterprise.

3. Click OK or Apply.

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OpEasy Licen	se Allocation										
	pEasy licenses to enterprises.										
OK Cance	el Apply Refresh										
Total Op	Easy User Licenses: Unlimited Total A	vailable: Unlimite	d Availabl	e for Auto: Uni	limited						
Total OpEasy Third Pa	arty Phone Licenses: Unlimited Total A	vailable: Unlimite	d Availabl	e for Auto: Uni	limited						
(Note: <s< th=""><th>system Level> is a special set of licenses for Syst</th><th>em Level ThirdParty</th><th>devices.)</th><th></th><th></th><th></th><th></th><th></th><th></th><th></th><th></th></s<>	system Level> is a special set of licenses for Syst	em Level ThirdParty	devices.)								
			OpEasy L	icense Allocatio	n to Each Enterpr	ise					
Enterprise ID	Enterprise Name	Non-Existent Enterprise	Enterprise License	User Licenses: Allocation	Allocated	Available	Third Party Licenses: Allocation	Allocated	Available	Clearspan User Count	Clearspan Party
<system level=""></system>							Auto 👻	1			
AastraCanada				Auto 👻	100		Auto 👻	0		100	
AcmeCorp	Road Runner's Acme			Auto 👻	306		Auto 👻	0		306	
Bulk Provisioning	Lab Val, Inc			Auto 👻	146		Auto 👻	39		146	
CallCenterTesting	CC Testing			Auto 👻	30		Auto 👻	8		30	
clearspanlab	Clearspan LAB			Manual 👻	10	6	Manual 👻	10	10	4	
EngLabTest	Engineering Lab Testing			Auto 🔹	34		Auto 💌	16		34	
Hawkins	Marty's Enterprise			Auto 👻	88		Auto 👻	72		88	
hawkins1				Auto 👻	0		Auto 👻	0		0	
Hawkins_new_test		Remove		Manual 👻	10	10	Manual 💌	10	10	0	
Hawkins_new_test_1		Remove	Disabled	Manual 👻	10	10	Manual 👻	10	10	0	
India	Mitel India Lab			Auto 👻	799		Auto 👻	88		799	
India Dev	India_Dev			Auto 👻	0		Auto 👻	0		0	
Kathleen Lab	Katheen's Lab			Auto 👻	19		Auto 👻	1		19	
Maytown	May Township, Lee County			Auto 👻	34		Auto 👻	5		34	
Mitel Labs	Mitel Labs		Disabled	Manual 👻	10	10	Manual 💌	10	10	0	
Moorehouse	Moore Enterprises of Texas			Auto 👻	4		Auto 👻	1		4	
Nayak	Neeta Nayak		Disabled	Auto 👻	2		Auto 👻	0		2	
PhoneIntLab	Plano Phone Integration Lab			Auto 👻	20		Auto 👻	5		20	
Ravipati	Kirana's Enterprise, Inc			Auto 👻	160		Auto 👻	64		160	

Figure 169: OpEasy Licensing Page

Managing Unique IDs

OpEasy allows you to assign IDs at the System, Enterprise, and Group levels that are prepended to an extension for use as a unique Auto Install Device ID. If a user is built as Extension Only or the User Profile rule for MAC Address uses something other than Phone Number, the Unique ID is used.

- 1. From the main menu, select Administrative Tools and then Unique ID Management. The Unique ID Management page open, showing a default Unique ID Length of 4 digits and a default Unique ID Position that is before the extension.
- 2. Select a System Unique ID, a unique ID for a System-level device.

Unique	ID M	lanagement	
--------	------	------------	--

Set and display Unique IDs at the system, enterprise, and group levels.

OK Cancel	Apply		
Unique ID Length: 4 Digit Unique ID Position: Before			
System Unique ID: 0000			
	Ente	erprises	
Enterprise ID 👌	Enterprise Name	Enterprise Unique ID 👌	Edit
AastraCanada			Edit
AcmeCorp	Road Runner's Acme	1500	Edit
Bulk Provisioning	Lab Val, Inc	1212	Edit
CallCenterTesting	CC Testing	1313	Edit
clearspanlab	Clearspan LAB		Edit
EngLabTest	Engineering Lab Testing	0010	Edit
Hawkins	Marty's Enterprise	0012	Edit
hawkins1			Edit
India	Mitel India Lab	0091	Edit
India Dev	India_Dev		Edit
Kathleen Lab	Katheen's Lab	1414	Edit
Maytown	May Township, Lee County	0048	Edit
Mitel Labs	Mitel Labs		Edit
Moorehouse	Moore Enterprises of Texas	0132	Edit
Nayak	Neeta Nayak		Edit
PhoneIntLab	Plano Phone Integration Lab		Edit
Ravipati	Kirana's Enterprise, Inc	0001	Edit
Shameer	Ahamed Shameer		Edit
SystemValidation	System Validation		Edit
test_Full			Edit
Test_Trial	Test		Edit
Testing			Edit

Figure 170: OpEasy Unique ID Management Page

- 3. Click on the Edit link at the end of the row or click anywhere in the row to select an Enterprise Unique ID on the Unique ID Management: Enterprise page.
- **4.** On the Unique ID Management: Enterprise page, click the **Edit** link to select a **Group Unique ID** on the Unique ID Management: Group page.
- 5. Click OK.



Note: If the System, Enterprise or Group has no assigned Unique ID, then the Select first available Unique ID hyperlink appears. Click the hyperlink to select the first available Unique ID.

Login Management

Login Management allows OpEasy administrators to manage subordinate administrator accounts. Login management is available to all levels of administrator except Department Administrator. Login Management allows you to perform the following tasks:

- · Search for subordinate OpEasy administrators
- Export the search results of subordinate OpEasy administrators
- Add or delete subordinate OpEasy administrators
- Disable OpEasy administrator accounts
- Change OpEasy administrator passwords
- Modify OpEasy administrator email addresses
- · Change the level of an OpEasy administrator account
- Customize OpEasy administrator privileges
- Identify OpEasy administrator accounts as Support Administrators
- Login into OpEasy through Single Sign On(SSO) or Two-Factor Authention(2FA)
- · View OpEasy administrator accounts by
 - All accounts
 - Support Administrators only
 - Administrator status (that is, Active, Logged-In, Logged-Out, Locked or Disabled)

Exporting Search Results of OpEasy Administrators

To export the search results of subordinate OpEasy administrators, select Login Management from the main menu.

- 1. Click **Search** to display all OpEasy Administrator accounts, or enter search parameters to filter your search.
- 2. Click **Export Results**, the ExportUser spread sheet is generated.

The spread sheet displays the following user data.

- Login Name
- Administrator Name
- Level
- Enterprise
- Group
- Support User
- Logged In
- Idle Duration
- Current Page

- Locked
- Disabled
- Date Account Created
- Account Active Date
- Account Expiry date

Adding or Modifying an Administrator Account

1. From the main menu, select Login Management.

The OpEasy Login Management page opens. You can search for OpEasy administrators and filter the list using the options at the top of the screen. You can sort the results using the sort buttons at the top of each column.

2. Click Export Results to export the search results.

Enter Search Crite (All Administrators)						OK Add Login Rules Help Usage Export Results						
(All Administrators)	Contains:											
(All Administrators)				- +								
				Adm	inistrators							
			(1-25 of 3	380) 🗔 🤜 🕇 2	3 4 5	67	8 9 1					
			(1-20 01 0									
Login Name 💠	Administrator Name 💠	Level 💠	Enterprise 💠	Group ¢	Support Admin	Logged In ≎	Idle Duration	Current Page 💠	Locked	Disabled		
MitelAdmin	Mitel Administrator	*** Master Administrator ***			Ť		Ť					
00Tester	Test Tester	Group Administrator	Bulk Provisioning Lab Val, Inc	(All Groups)								
abcd	abcd	Enterprise Administrator	India Mitel India Lab							Yes		
admin_EA	Hameetha	Enterprise Administrator	India Mitel India Lab									
afinch@clearspan.com	aa	Enterprise Administrator	Hawkins Marty's Enterprise							Yes (Inactiv		
alavoie	Arlan LaVoie	Super User				Yes	0:03:47	Administrative Tools: System Message				
alavoie-ea	Arlan LaVoie	Enterprise Administrator	PhoneIntLab Plano Phone Integration Lab									
alavoie-sa	Arlan	System Administrator										
alavoie-sr		Solution Reseller										
arjun	Arjun Varadannavar	Super User										
arjunasdf	arjunasdf	Super User										
arjunasdf1	arjunasdf	Solution Reseller										
arjunbvSA	arjunbvSA	System Administrator										
arjunbvSr1	arjunsr1	Solution Reseller										
	arjundept	Department Administrator	Bulk Provisioning Lab Val, Inc	Group_G Group, Gewel						Yes		

Figure 171: OpEasy Login Management Page

3. Click **Add** to create a new administrator account, or click anywhere on the row to modify an administrator account.

The OpEasy Administrator page opens.

OpEasy Administrator Add Add new OpEasy administrator. Press the Apply button to save the new administrator. Then, press the Customize Privileges button to set the privileges for the new administrator.							
OK Cancel	Apply Customize Privileges						
Administrator							
Login Name:							
Administrator Name:							
Enter Password:							
Confirm Password:							
	Change Password at Next Login						
E-mail Address:							
E-mail Address for Two-							
Factor Authentication:	Temporary Account						
Account Active From:	To: (Note – Administrator will be notified of any changes made to the account active dates.)						
Notify Before:	1 v Davs						
	Disable Account						
Settings							
Login Level:	(Select Login Level) •						
	Must Login only using Single Sign-On (SSO). No direct login permitted.						
	Two-Factor Authentication						

Figure 172: OpEasy Administrator Add Page

OpEasy Administrator Modify Modify an existing OpEasy administrator.									
OK Cancel	Apply								
Administrator									
Login Name:	MitelAdmin								
Administrator Name:	Mitel Administrator								
Reset Password:									
Confirm Password:									
	Password last changed on Tue, 11 Oct 2016 7:10:15 CDT. Change Password at Next Login								
E-mail Address:									
E-mail Address for Two- Factor Authentication:									
Status									
	Administrator is LOGGED OUT Last logged in on Fri, 11 Sep 2020 13:24:13 CDT								
Settings									
	Super User *** Master Administrator ***								

Figure 173: OpEasy Administrator Modify Page

- **4.** Enter or change the **Administrator Name**. This is typically the actual name of the administrator rather than the login name, which is often shorter or different from the administrator's name.
- 5. Enter a **Password** and **Confirm Password** for the administrator account. The following default password rules apply, although they can be changed by advanced administrators:
 - · At least one upper case character
 - At least one lower case character
 - At least one non-alphanumeric character

- · Minimum password length of eight characters
- · Cannot be the reverse of the previous password
- 6. Enable Change Password at Next Login if you want that this administrator is required to change the account password at the next login.
- 7. Enter the administrator's E-mail Address.
- 8. Enter the administrator's E-mail Address for Two-Factor Authentication.
- 9. Click **Temporary Account** and select the **Account Active From** and **Account Active To** date range. You will be notified every time you enter or modify the **Account Active From** and **Account Active To** dates.
- **10.** Select the number of days from the **Notify before** drop-down box. Email notifications will be sent the same number of days prior to the expiry date. The values in the **Notify before** drop-down list is in the range of 1 day to 15 days.
- **11.** You can select the **Disable Account** setting to disable this administrator's account without deleting it.
- **12.** Set the administrator's **Login Level**.
- 13. Enable Must Login only using Single Sign-On(SSO) to prohibit the administrator from logging in directly to OpEasy or Two-Factor Authentication(2FA) for an administrator to be configured.
- 14. Choose selections for Support Administrator, Clearspan Pilot Program Administrator, Enterprise, Group, and Department, if those settings are configurable for this administrator.
- 15. Click Customize Privileges if you want to change the privileges for this administrator.
- 16. Click OK or Apply.



Note: When a user with an expired account, or disabled account logs into Opeasy, the error message "Name or Password you entered is incorrect." is displayed.

Modifying Administrator Login Rules

- 1. From the main menu, select Login Management.
- 2. Click Login Rules.

	Management													
Display, add	I, or modify OpEasy admi	inistrators.	_											
ОК	Add	Login Rules	Help U	Isage										
Enter	Enter Search Criteria: Search													
(All Admir	((All Administrators) V Contains: V													
						Adi	ministrators							-
Login Name ≎	Administrator Name	Level 💠	Enterprise	Group 💠	Support Admin ≎	Logged In ≎	Idle Duration ≎	Current Page 💠	Locked	Disabled ≎	Date Account Created \diamondsuit	Account Active Date \diamondsuit	Account Expiry Date \diamondsuit	Edi
Search mu	st be completed to displa	iy a list of admi	nistrators.											
						End of OpE	asy Administr	ators -						

Figure 174: OpEasy Login Rules

The Login Rules View page displays. You can view System-level or Enterprise-level rules used for OpEasy logins and rules used to validate passwords for OpEasy administrators.

	Rules Modify rules used to login to OpE	asy, including those rules to validate the password for an OpEasy administrator.							
ОК	Cancel	ancel Apply							
		Use System Login Rules for All Enterprises Use separate Login Rules for each Enterprise (System Login Rules)							
System	Login Rules								
Pa	assword Rules								
14	Assword Rules	 Must have from 1 • to 15 • Characters Cannot contain the Login Name or Administrator Name Cannot be a Repeating Pattern Are checked against the Previous Password • Cannot be a Previous Password • Cannot contain a Previous Password • Cannot contain the Reverse of a Previous Password • Cannot be a Previous Password • Cannot contain the Reverse of a Previous Password • Cannot be a Previous Password • Connot be a Previous Password • Must contain at least • I Upper Case Alpha Character • Must contain at least • I Non-Alphanumeric (Special) Character • 							
	Login Rules								
	Administrators:	 Must Login using Single Sign-On (SSO). No direct login permitted. Overrides administrator login setting. (Only affects EAs, GAs, and DAs) Two-Factor Authentication. Overrides administrator login setting. (Only affects EAs, GAs, and DAs) Two-Factor Authentication Confirmation Code: Invalid After 5 Incorrect Entries Two-Factor Authentication Screen Timeout: After 10 Minutes Must change the Initial Password (New Administrators) Must change all Reset Passwords (Existing Administrators) Return to the Login screen upon Session Timeout 							
Mini	imum Password Lifetime:								
	Passwords Expire:								
	Lock OpEasy Account:								
		dru.nelson@mitel.com							
	Unlock OpEasy Account:	After 5 Minutes 👻							

Figure 175: OpEasy Login Rules View

Common Tasks

This section provides instructions for common administrator tasks that involve management of Clearspan phones.

A *Clearspan device* is what is created via OpEasy or via the Clearspan web portal, which defines the characteristics of a phone device such as the user of the phone, its template, and so on. The Clearspan device can exist without association to a physical phone. The *physical phone* is the actual terminal that is assigned a MAC address. The physical phone must have an associated Clearspan device to make the phone functional on Clearspan. These instructions assume the following:

- Device Management is used to manage the configuration of the Clearspan device.
- DHCP is used to provide an IP address to the phone and the network path to the Clearspan XSP server, where the phone's configuration is obtained.

Set Up a New Phone for a New User

Follow these steps to set up a new phone for a new user.

- **1.** Power up and connect the phone to the network.
- 2. Factory default the phone.
- 3. Perform phone specific installation.

Setting Up a New Mitel Phone

- 1. Near the end of the startup process, an Auto Install page appears and the user is prompted for the Device ID. Enter the Auto Install Device ID set for the Clearspan device and press the button labeled "Done".
- **2.** A confirmation screen appears containing the name of the user of the phone device identified by the Device ID. If that information is for the correct Clearspan device, press "OK".
- **3.** Auto Install creates device credentials for the phone and updates the Clearspan device with both the MAC address of the phone and the new device credentials. Auto Install then restarts the phone to complete the install process.

Setting Up a New Polycom Phone

- 1. After the startup process completes, the 'QSetup' button appears on the phone.
- 2. Press the 'QSetup' button and at the 'Server User' and 'Server Pwd' prompts, enter the Device Access Username and Password respectively.



Note: The Device Access Username is available via OpEasy Phone Management but the Device Access Password is blanked out. If you are unsure of the current password, enter a new password using Phone Management so that you are assured the password you enter in the phone matches the one defined for the Clearspan device.

- 3. Confirm the changes when prompted and the phone restarts.
- 4. After the restart completes, the phone is ready for use.

Replace a Physical Phone with a Different Type of Phone

Follow these steps to replace a physical phone with a phone of a different type.

- 1. Using OpEasy, navigate to **Provisioning | Users**, and modify the user associated with the device you want to replace.
- 2. From the User Modify page, select the **Phones** tab and click **Edit** for the device that is to be replaced.
- 3. The User: Primary Phone Device Modify page opens. The current Phone Device appears in the drop-down box. From this page, either click the **Unassign** button to disassociate the user from this phone device, or click the **Delete** button disassociate the user from this phone and delete the phone device.
- **4.** Click **OK** to unassign the user from the device. The Advanced: User Modify page display, and the list of Phone Devices no longer includes the Primary phone type.
- 5. Click to Add Primary Phone.
- **6.** The User: Primary Phone Device Add page opens. The default Phone Device field value is New Phone Device.
 - If you want to build a new device, take this default and supply the Device Name, Device Level, Device Type, Template and MAC Address of the new phone.
 - If you have previously created a phone device that you choose to use for this user, rather than taking the default of (New Phone Device), use the drop-down box to find the phone you want. Note that the Device Level, Device Type, Template and MAC Address should be populated because this device was previously created.
- 7. After all fields for the new device are set as needed, click **OK** twice. The Advanced: User Modify page opens. Note that the new primary phone device appears in the Phone Devices list.
- 8. Click **OK** on this page to implement the change.
- **9.** Power down and remove the original phone from the network, and put the new phone in its place. Because the new phone's MAC Address was provided at the time the device was created, the phone should be functional immediately after the reboot process.
- **10.** If the original device was only unassigned and you have no further use for it, delete it via Provisioning | Phone Management.

Disassociate a Clearspan Device from a Physical Phone

To remove a physical phone from its associated Clearspan device, removing the MAC Address of the physical phone from the Clearspan device definition, follow these steps.

- If using the OpEasy User Interface:
- 1. Navigate to Provisioning | Phone Management and find the device that is to be disassociated.
- 2. Clear the MAC Address field for that device.
- 3. Save the change.
 - If using the OpEasy Advanced Import worksheet, from the User worksheet:
- 4. For the device or devices that are to be disassociated, use the "ModifyDevice" command.

- 5. Enter the text "null" in the MAC Address column(s).
- 6. Import the worksheet using Advanced Import to affect the changes.

Reuse a Clearspan User / Device and Reset Voicemail

You might want to assign a set of phones to a new set of users, and reset the related Voicemail boxes, such as with phones placed in college dormitories. Follow these recommended steps to re-use the Clearspan users/devices and refresh the Voicemail boxes.

Close User Accounts

- 1. Perform an export of the existing users/devices via the Advanced Export function, including the Users and Voicemail worksheets.
- 2. If the phone numbers are to be inactive during the interim period, use the Users worksheet to modify each user's **Phone Number Activation** setting to 'deactivate'.
- **3.** If the phone numbers are not deactivated, use the Voicemail worksheet to modify each user's **Active** column to 'false', which completely disables voicemail for the user.

Re-open User Accounts

- 1. Perform an export of the existing users/devices via the Advanced Export function, including the Users and Voicemail worksheets.
- 2. Use the Users worksheet to modify each user to both:
 - a. Set the Last Name, First Name, Calling Lineld Last Name and Calling Lineld First Name for the new user (if the names are customized to each user).
 - b. Set each user's Phone Number Activation column to 'activate'.
- 3. Use the Voicemail worksheet to modify each user to both:
 - a. Set the Active column to 'True', which allows Voicemail functionality.
 - **b.** Reset the user mailbox by entering 'reset' in the **Surgemail Account** column. The reset command rebuilds the mailbox, so entry of the 'Mail Server Email Address' and 'Mail Server User Id' is also required.

Appendix A: OpEasy Setup for Polycom Phones

The following settings must be configured within OpEasy prior to installing Polycom phones at users' desks, as described in the following sections:

- Polycom Phone Support: Support for Polycom phones requires a 3rd Party system license to be installed.
- User Profiles: One or more User Profiles must be created for each type of Polycom phone so that the administrator can build Polycom phones for provisioning.
- Phone Templates

Key Definitions – In addition to the Polycom standard soft keys, some OpEasy-configured soft keys may be assigned to Polycom phones.

Global Settings – System, Enterprise, and Group level settings must be configured for Polycom phones.

Definitions – One or more templates must be created for each type of Polycom phone.

Notes:

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- For new settings added to Templates and Global Settings, the '(Unspecified)' selection option or text value is displayed. The '(Unspecified)' value indicates no value has ever been set, causing OpEasy to NOT generate configuration file fields for that new OpEasy setting. As such, any existing Global Extra Settings for that configuration file field continue to be used. However, once a setting has been changed to an actual value (replacing the '(Unspecified)' value), then OpEasy generates configuration file fields for that setting from then on. These actual values then override any Global Extra Settings for that field. After a value is selected to replace the '(Unspecified)' value, the '(Unspecified)' value, the '(Unspecified)' value is no longer an option.
- You can configure extra settings only if you have the full access privilege to view and edit extra settings.

User General Settings:– The E-mail message sent to new Polycom phone users will be different from the message sent to Mitel phone users.

Users:- Users must be created with a supported Polycom phone.

Phone Management:– Polycom phones can be added or modified under the Phone Management page of Provisioning.

Polycom Phone Support

The Polycom Phone Support 3rd Party system license for Clearspan must be purchased and installed.

Furthermore, if Enterprise Licensing is in use, Polycom Phone Support must be licensed within the appropriate Enterprises for the level of administrators that will be configuring Polycom phones, which

is typically every administrator level (Solution Reseller, Enterprise Administrator, Group Administrator, and Department Administrator).

User Profiles for Polycom Phones

In order to allow administrators to quickly set up users with Polycom phones, one or more User Profiles should be created for each type of Polycom phone that will be used. When creating a User Profile, the administrator selects one of the supported Polycom phones as the Device Type. The selected type of Polycom phone will be created as the primary phone device for the new user.

Phone Templates for Polycom Phones

Key Definitions for Polycom Phones

The OpEasy soft keys are configured on the Key Definitions page for provisioning Phone Templates. Key Definitions are typically accessible by system administrators only, as they affect keys system wide.

When Polycom is selected as the Phone Manufacturer on the Key Definitions page, definitions specific to Polycom phones are displayed

Key Definitio Display and configure system	INS stem and per enterprise keys.							
OK Cancel Apply Add								
Ente	rprise: (System Keys) 👻							
Phone Manufa	cturer: Polycom + Polycom	Prompts F	Polycom Macros					
Rebuild S	Status: Refresh System: None pending.							
			Key Definitions	;				
Label 👌	Value 👌	Idle	Connect	Incoming	Outgoing	Dial Tone	Setup	Hold
BLF List								
Call Fwd Off	#21		1		S		1	~
Call Fwd On	*21				×		v	V
Call Pickup	Pickup (*98\$Tinvite\$							1
Call-Park	SChold\$*68\$P(ParkNum)N4\$\$Tinvite\$		1					
Call-Rtrv	*88\$P(ParkNum)N4\$\$Tinvite\$							1
Conf	SFConferenceS		1					
Dirct Pickup	SChangupS*97STinviteS		1	v	v		4	~
Favorites								
Line								
Paging	%PAGING_EXT%\$Tinvite\$							~
Park	SCholdS*68STinviteS		~	1	v		1	
Park Rtrv	SChangupS*88STinviteS		~	1	v		1	1
Pickup	SChangupS*98STinviteS		~	1	v		1	1
Recent	SFCallListS							1
Retrieve	*88SP5N4S							~

Figure 176: Key Definitions for Polycom Phones

In addition, soft keys can be created to dial Clearspan feature codes or specific numbers. To define a new key, select an Enterprise on the Key Definitions page and click Add. Enter the following in the Key Definition fields.

FIELD	SETTING
Label	Enter the label of the new key, as it is to appear on the displayed soft key.
Value	Enter the actions to take for the soft key as executed by the Polycom phone. May include references to Polycom prompts or macros. This value must conform to the Polycom macro definitions, explained in the <i>Polycom UC Software Administrator's Guide</i> .
Idle/Active/Alerting / Proceeding /Dial Tone /Setup / Hold	Select the phone states in which this soft key should appear.

Polycom Prompts

From the Key Definitions page for Polycom Phones, click Polycom Prompts to view user input prompts for Polycom key actions. The prompts can be included in a key definition by using syntax "\$P(PromptName)Nn\$", where "PromptName" is the Prompt Name on the Polycom Prompt Definitions page, and "n" is the number of characters to collect.

Prompt Text is the text that appears on the phone's display, Input Type specifies whether the expected response is Numeric or Text, and the Visible check box indicates whether the response is visible on the phone's display or is shown as asterisks.

ay and configure user input prompts for P in (and "2" means collect 2 characters).	Polycom key actions. The prompts below may be included in	n a key definition by using syntax "\$P	(PromptName)N2\$" where	e "PromptName" is
in (and 2 means collect 2 characters).				
OK Cancel Apply	Add			
	Delvere Devent Def			
	Polycom Prompt Def	initions		
Prompt Name 👌	Polycom Prompt Def Prompt Text o	initions Input Type 👌	Visible 👌	Delete
			Visible 👌	Delete Delete
Prompt Name 🔉 ParkNum Test2	Prompt Text 👌	Input Type 👌	Visible 👌	
ParkNum	Prompt Text o	Input Type 💿		Delete

Figure 177: Polycom Prompt Definitions Page

For more information about Polycom user prompts, refer to the *Polycom UC Software Administrator's Guide*.

Polycom Macros

From the Key Definitions page for Polycom Phones, click Polycom Macros to view and configure definitions for Polycom key macros. The key macros can be included in key definitions using syntax "\$MName\$" where "Name" is the unique Name defined on the Polycom Macro Definitions page. Label is the text string that appears on any text entry screen, and Action contains the functionality to execute. This action must conform to the Polycom macro definitions, explained in the *Polycom UC Software Administrator's Guide*.

Polycom Macro Definitions isplay and configure definitions for Polycom key macros. The key macros can be included in key definitions using with syntax "SMName\$" where "Name" is defined inthe Name column below.				
OK Cancel Apply Add				
Polycom Macro Definitions				
Name 👌	Label 👌		Action 👌	Delete
CallRetrvMac	CallRet		*88\$P(ParkNum)N4\$\$Tinvite\$	Delete
			- End of Definitions -	

Figure 178: Polycom Macro Definitions Page

For more information about Polycom macro definitions, refer to the *Polycom UC Software Administrator's Guide*.

System, Enterprise, and Group Global Settings for Polycom Phones

To configure global Polycom phone settings, choose Phone Templates from the Provisioning menu, and then select Global Settings and select Polycom as the Phone Manufacturer. The common global settings for Polycom phones are shown on the General Settings tab and described in the following table.

OpEasy analyzes the Group, Enterprise, or System Extra Settings to determine if the parameters in the Extra Settings are being overridden by the General Settings, Dial Plan Settings or Custom Rings Settings, or if the parameters in the Extra Settings are overriding the General Settings, Dial Plan Settings or Custom Rings Settings. If parameters that correspond to any of the General Settings, Dial Plan Settings or Custom Rings Settings are found in the Global Extra Settings, then the **Global Configuration File Settings: Extra Settings Audit Results** page is displayed, indicating the extra settings parameters that conflict with the Global Settings configuration.

Field	Setting	
SIP Settings		
Outbound Proxy	Enter the hostname or IP address of the outbound proxy server used by the Polycom phones.	
Use DNS SRV Lookup	Select the Use DNS SRV Lookup option to use the Outbound Proxy Port (No Encryption) and Outbound Proxy Port (Encryption) of the DNS SRV.	
Outbound Proxy Port (No Encryption)	Enter the port number for the outbound proxy server used by the Polycom phones when encryption is not used by Polycom phones. The port number may be 0, 5060, or another port.	
Outbound Proxy Port (Encryption)	Enter the port number for the outbound proxy server used by the Polycom phones when encryption is used by Polycom phones.	
Encryption (TLS/SRTP)	Select the setting for encryption. Encryption is available on VVX models only.	
Time Settings		
Time Server	Enter the hostname or IP address of a timer server.	
Time Zone	Select the time zone that the phones are in.	
Device Settings		
Network Discovery	Select the CDP Enabled field if CDP is supported by the network, which is normal.	

Field	Setting
LAN Port Mode	Select the LAN speed, normally Auto. The other options include 10 Mbps Half-Duplex, 10 Mbps Full-Duplex, 100 Mbps Half-Duplex, 100 Mbps Full-Duplex, 1000 Mbps Full-Duplex.
Admin Password	Enter a password that is required to access the advanced settings within the phone.
User Password/Reset User Password	Enter a password that is required to access the user settings within the phone. The Reset User Password field will be displayed if the User Password is already set.
Voice Codecs	
Voice Codec #1 to #4	Identify the voice codecs that the Polycom phone is to use when placing or receiving calls. The codecs are in priority order, with Codec #1 as the highest priority codec to codec #4 as the lowest priority codec.
Quality Monitoring	
Quality Monitoring Enable	Choose whether periodic and/or session quality monitoring is used.
Collector Server Address	Enter the hostname or IP address of the server to which quality monitoring messages are sent by the phone.
Collector Server Port	Enter the port to use on the collector server. The default port number is 5060.
Outbound Proxy	Enter the Quality Monitoring outbound proxy FQDN / IP Address. When configured, this parameter directs SIP messages related to voice quality monitoring to a separate proxy.
Outbound Proxy Port	Enter the Quality Monitoring outbound proxy port used in with the Quality Monitoring outbound proxy.
Periodic Monitor Period	Enter period (in seconds) used for Periodic Monitoring. The valid values are 5-90 seconds. The default value is 90 seconds.
SoundPointIP Settings	
'Welcome' Audio File	Enter the address and/or name of the audio file played to a SoundPoint IP phone.
General Settings	
Conference Server	Select the conference server to use for conference calls.
Firmware Server	Text field that contains the location of the firmware to be loaded.

System, Enterprise, and Group Extra Settings for Polycom Phones

To enter extra settings that are to be applied to all Polycom phones within the scope of the level, choose **Phone Templates** from the **Provisioning** menu, select **Global Settings**, the **Global Configuration File Settings** tab opens.

To edit extra settings for the group, select **Enterprise**, **Group** and **Phone Manufacturer**, click **Extra Settings**, the **Extra Settings** tab opens, click **Group Extra Settings**, and Click **OK** on the confirmation box (the confirmation box displays "Updating Extra Settings is potentially dangerous. Are you sure you want to update Extra Settings?"). Enter the extra settings in the **Group Extra Settings** box and Click **OK**, the **Global Configuration File Settings: Rebuild Configuration Files** page opens. Click **Save and Rebuild** to save the Template changes and rebuild all configuration files using this template. Only Group Administrators and above can create or modify Group Extra Settings.

To edit extra settings for the enterprise, select **Enterprise**, **Group** and **Phone Manufacturer**, click **Extra Settings**, the **Extra Settings** tab opens, click **Enterprise Extra Settings**, and Click **OK** on the confirmation box (the confirmation box displays, "Updating Extra Settings is potentially dangerous. Are you sure you want to update Extra Settings?"). Enter the extra settings in the **Enterprise Extra Settings** box and Click **OK**, the **Global Configuration File Settings: Rebuild Configuration Files** page opens. Click **Save and Rebuild** to save the Template changes and rebuild all configuration files using this template.

Only Enterprise Administrators and above can create or modify Enterprise Extra Settings.

To edit extra settings for the system, select **Enterprise**, **Group** and **Phone Manufacturer**, click **Extra Settings**, the **Extra Settings** tab opens, click **System Extra Settings**, and Click **OK** on the confirmation box (the confirmation box displays, "Updating Extra Settings is potentially dangerous. Are you sure you want to update Extra Settings?"). Enter the extra settings in the **System Extra Settings** box and Click **OK**, the **Global Configuration File Settings: Rebuild Configuration Files** page opens. Click **Save and Rebuild** to save the Template changes and rebuild all configuration files using this template.

Only System Administrators and Super Users can create or modify the System Extra Settings.

Global Configuration File Settings
Display and change the global Clearspan settings for a selected Phone Manufacturer. After being saved, the change occurs at the next resync or reboot of the affected phones.
OK Cancel Apply Initialize MAC Address Capture
Enterprise: Bulk Provisioning Lab Val, Inc -
Group: Group_G Group, Gewel
Phone Manufacturer: Polycom +
General Settings Extra Settings System Config File Extension Dial Plan Custom Rings
Group Extra Settings
Enterprise Extra Settings
Choose File Upload File
Choose File Upload File
System Extra Settings
<volpprot> <volpprot.sip.specialevent.lineseize.volpprot.sip.specialevent.lineseize.nonstandard="0"></volpprot.sip.specialevent.lineseize.volpprot.sip.specialevent.lineseize.nonstandard="0"></volpprot>
<pre><voipprot.sip.serverfeaturecontrol.voipprot.sip.serverfeaturecontrol.cf="1" voipprot.sip.serverfeaturecontrol.dnd="1"></voipprot.sip.serverfeaturecontrol.voipprot.sip.serverfeaturecontrol.cf="1"> <voipprot.sip.serverfeaturecontrol.localprocessing.dnd="1"></voipprot.sip.serverfeaturecontrol.localprocessing.dnd="1"></pre>
 <call></call>
<pre><call call.sell.self.ret.inekey="1"></call> </pre>

Figure 179: Global Extra Settings for Polycom Phones

System, Enterprise, and Group System Configuration File Extension Settings for Polycom Phones

The Device Type for each Polycom phone model includes a **sys.cfg** file that contains system-wide configuration settings used in the configuration files for all Polycom phones of that phone model. These settings can be extended by choosing **Phone Template** from the **Provisioning** menu, selecting **Global Settings** and selecting **Polycom** as the Phone Manufacturer, clicking on the **System Config File Extension** tab, and entering the additional settings on that tab. The additional settings must be in an XML format as are all Polycom configuration settings.

Note that the sys.cfg file and the settings on the System Config File Extension tab have lower-priority than ALL other Global Settings (including Global Extra Settings) and Template Settings. However,

the System Config File Extension tab settings have higher-priority than the settings in the sys.cfg file being extended.

Only Super Users and System Administrators can access the **System Config File Extension** Settings.

Global Configuration File Settings				
Display and change the global Clearspan settings for a selected Phone Manufacturer. After being saved, the change occurs at the next resync or reboot of the affected phones.				
OK Cancel Apply Initialize MAC Address Capture				
Enterprise: Bulk Provisioning – Lab Val, Inc 💌				
Group: Group_G Group, Gewel +				
Phone Manufacturer: Polycom 👻				
General Settings Extra Settings System Config File Extension Dial Plan Custom Rings				
System Config File Extension				
<volpprot> <volpprot.server.1 volpprot.server.1.expires="3600"></volpprot.server.1></volpprot>				
 <volpprot.server.1 subscribe="" volpprot.server.1.subscribe.expires="380"></volpprot.server.1> <volpprot.sip></volpprot.sip> 				
<volpprot.sip.mtls volpprot.sip.mtls.enable="0"></volpprot.sip.mtls>				
 «voipProt.SIP outboundProxy» «voipProt.SIP outboundProxy.failOver 				
volPProt.SIP.outboundProxy.failOver.reRegisterOn="1" volPProt.SIP.outboundProxy.failOver.failRegistrationOn="1"				
voIPProt.SIP.outboundProxy.failOver.onlySignalWithRegistered="1"				
voIPProt.SIP.outboundProxy.failDate.tmode="duration" voIPProt.SIP.outboundProxy.failDate.timalBate.timaout="0"/>				
</th				
<sec> <sec.strb enable="0" sec.strb.enable="0" sec.strb.require="1"></sec.strb></sec>				
<sec.srtp.offer.sec.srtp.offer.hmac_sha1_80="1"></sec.srtp.offer.sec.srtp.offer.hmac_sha1_80="1">				
<pre><sec.stp.sessionsparams> <sec.stp.sessionsparams.noauth< pre=""></sec.stp.sessionsparams.noauth<></sec.stp.sessionsparams></pre>				
Choose File Upload File				
UNUSE FILE OPPORT IN				

Figure 180: System Config File Extension Settings for Polycom Phones

System, Enterprise, and Group Dial Plans for Polycom Phones

Click the Dial Plan tab on the Global Configuration File Settings page to enter dial plan information for System, Enterprise, or Group levels, or click **Use Enterprise Setting** to use enterprise settings, or click **Use System Setting** to use system settings. The dial plan information entered must be in Polycom format and can include any Polycom-specific setting.

System and Enterprise Custom Rings for Polycom Phones

System-level custom rings are ONLY used for system-level Polycom phone templates that need to use a custom ring. Enterprise-level custom rings are used for both the enterprise-level and group-level Polycom phone templates.

To configure custom rings, choose Phone Templates from the Provisioning menu, and then select Global Settings. Choose Polycom as the Phone Manufacturer, and click the Custom Rings tab. The Polycom Custom Rings tab opens.

ок с	ancel Apply	Initialize MAC Address Capture	2			
En	·	ning Lab Val, Inc 👻				
Phone Manuf	Phone Manufacturer: Polycom •					
eneral Settings	Extra Settings	System Config File Extension	Dial Plan Custom Rings			
Add Enterprise	stom Rings Custom Ring					
	9	File Name 👌		Time Between Rings 🔉	Default Polycom Ring 🖕	Edit
Add Enterprise	Custom Ring Sampled Audio	File Name 🔉	Sounds/AreYouThere.wav	Time Between Rings 👌 3000	Default Polycom Ring 👌 Ring 19	Edit
Add Enterprise	Custom Ring Sampled Audio http://tb20xsp.csi					Edit
Add Enterprise Ring Name \diamond AreYouThere Darth FlintPhone	Sampled Audio http://tb20xsp.csi http://tb20xsp.csi http://tb20xsp.csi	ab.mitel.com:80/dms/Polycom_Ring_ lab.mitel.com:80/dms/Polycom_Ring_ lab.mitel.com:80/dms/Polycom_Ring_	Sounds/Darth.wav Sounds/FlintPhone.wav	3000 3000 3000	Ring 19 Ring 20 Ring 18	Edit
Add Enterprise Ring Name AreYouThere Darth FlintPhone GoCanes	Sampled Audio http://tb20xsp.cs http://tb20xsp.cs http://tb20xsp.cs http://tb20xsp.cs	ab.mitel.com:80/dms/Polycom_Ring lab.mitel.com:80/dms/Polycom_Ring lab.mitel.com:80/dms/Polycom_Ring lab.mitel.com:80/dms/Polycom_Ring	Sounds/Darth.wav Sounds/FlintPhone.wav Sounds/LetsGoCanes.wav	3000 3000 3000 3000	Ring 19 Ring 20 Ring 18 Ring 22	Edit
Add Enterprise Ring Name AreYouThere Darth FlintPhone GoCanes GoGators	Sampled Audio http://tb20xsp.csi http://tb20xsp.csi http://tb20xsp.csi http://tb20xsp.csi	ab.mitel.com:80/dms/Polycom_Ring lab.mitel.com:80/dms/Polycom_Ring lab.mitel.com:80/dms/Polycom_Ring lab.mitel.com:80/dms/Polycom_Ring lab.mitel.com:80/dms/Polycom_Ring	Sounds/Darth.wav Sounds/FlintPhone.wav Sounds/LetsGoCanes.wav Sounds/GoGators.wav	3000 3000 3000 3000 3000 3000	Ring 19 Ring 20 Ring 18 Ring 22 Ring 15	Edit
Add Enterprise Ring Name AreYouThere Darth FlintPhone GoCanes GoGators Jamaica	Sampled Audio http://tb20xsp.csi http://tb20xsp.csi http://tb20xsp.csi http://tb20xsp.csi http://tb20xsp.csi	ab.mitel.com:80/dms/Polycom_Ring ab.mitel.com:80/dms/Polycom_Ring ab.mitel.com:80/dms/Polycom_Ring ab.mitel.com:80/dms/Polycom_Ring ab.mitel.com:80/dms/Polycom_Ring ab.mitel.com:80/dms/Polycom_Ring	Sounds/Darth.wav Sounds/FlintPhone.wav Sounds/LetsGoCanes.wav Sounds/GoGators.wav Sounds/Jamaica.wav	3000 3000 3000 3000 3000 3000 3000	Ring 19 Ring 20 Ring 18 Ring 22 Ring 15 Ring 16	Edit
Add Enterprise Ring Name AreYouThere Darth FintPhone GoCanes GoGators Jamaica Spongebob	Custom Ring Sampled Audio http://tb20xsp.cs http://tb20xsp.cs http://tb20xsp.cs http://tb20xsp.cs http://tb20xsp.cs http://tb20xsp.cs	ab.mitel.com.80/dms/Polycom_Ring_ ab.mitel.com.80/dms/Polycom_Ring_ ab.mitel.com.80/dms/Polycom_Ring_ ab.mitel.com.80/dms/Polycom_Ring_ ab.mitel.com.80/dms/Polycom_Ring_ ab.mitel.com.80/dms/Polycom_Ring_ ab.mitel.com.80/dms/Polycom_Ring_	Sounds/Darth.wav Sounds/FiintPhone.wav Sounds/LetsGoCanes.wav Sounds/GoGators.wav Sounds/Jamaica.wav Sounds/Jamaica.wav Sounds/Jamaica.wav	3000 3000 3000 3000 3000 3000 3000 300	Ring 19 Ring 20 Ring 18 Ring 22 Ring 15 Ring 16 Ring 17	Edit
Add Enterprise Ring Name AreYouThere Darth EinPhone GoCanes GoCates Jamaica	Custom Ring Sampled Audio http://tb20xsp.cs http://tb20xsp.cs http://tb20xsp.cs http://tb20xsp.cs http://tb20xsp.cs http://tb20xsp.cs	ab.mitel.com:80/dms/Polycom_Ring ab.mitel.com:80/dms/Polycom_Ring ab.mitel.com:80/dms/Polycom_Ring ab.mitel.com:80/dms/Polycom_Ring ab.mitel.com:80/dms/Polycom_Ring ab.mitel.com:80/dms/Polycom_Ring	Sounds/Darth.wav Sounds/FintPhone.wav Sounds/LetGoCanes wav Sounds/GoGators.wav Sounds/Jamaica.wav Sounds/Spongebob.wav Sounds/WarChant.wav	3000 3000 3000 3000 3000 3000 3000 300	Ring 19 Ring 20 Ring 18 Ring 22 Ring 15 Ring 16	Edit
Add Enterprise Ring Name AreYouThere Darth FintPhone GoCanes GoGators Jamaica Spongebob	Custom Ring Sampled Audio http://tb20xsp.cs http://tb20xsp.cs http://tb20xsp.cs http://tb20xsp.cs http://tb20xsp.cs http://tb20xsp.cs	ab.mitel.com.80/dms/Polycom_Ring_ ab.mitel.com.80/dms/Polycom_Ring_ ab.mitel.com.80/dms/Polycom_Ring_ ab.mitel.com.80/dms/Polycom_Ring_ ab.mitel.com.80/dms/Polycom_Ring_ ab.mitel.com.80/dms/Polycom_Ring_ ab.mitel.com.80/dms/Polycom_Ring_	Sounds/Darth.wav Sounds/FiintPhone.wav Sounds/LetsGoCanes.wav Sounds/GoGators.wav Sounds/Jamaica.wav Sounds/Jamaica.wav Sounds/Jamaica.wav	3000 3000 3000 3000 3000 3000 3000 300	Ring 19 Ring 20 Ring 18 Ring 22 Ring 15 Ring 16 Ring 17	Edit

Figure 181: Custom Rings for Polycom Phones

Click the button to show either Enterprise Custom Rings or System Custom Rings. Click Edit in the table to change an existing custom ring, or click the appropriate Add Custom Ring button to create a new custom ring.

Enter or change the following fields for the custom ring:

Field	Setting
Ring Name	Unique name to give the custom ring. This name is referenced to select the custom ring when creating the template.
Audio File Name	Complete URL of a wave file containing the audio to be played as the ring.
Time Between Rings	Enter the number of milliseconds to wait between the played audio rings. Example: 3000 for 3 seconds.
Default Polycom Ring	Optionally select a Polycom ring (Ring 15 to Ring 24) where this custom ring is to be defined. It is used when creating a new phone template for a Polycom phone.
	If a Default Polycom Ring is not selected, the custom ring can still be manually assigned to a Polycom ring in the phone template. Selecting the Polycom ring here simplifies the process of creating the phone template for commonly used custom rings.

Initialize MAC Address Capture for Polycom Phones

To configure MAC Address Capture tags, choose Phone Templates from the Provisioning menu, and then select Global Settings. Select Polycom as the Phone Manufacturer, and click on Initialize MAC Address Capture. This is typically a one-time task used to add a MAC address tag to each Polycom device in the system. You must have System Administrator privileges to access this function.

	Global Configuration File Settings Display and change the global Clearspan settings for a selected Phone Manufacturer. After being saved, the change occurs at the next resync or reboot of the affer					
OK Cancel	Apply	Initialize MAC Address Capture				
Enterprise: Group:	Bulk Provision Group_G Gr	ng Lab Val, Inc 👻 oup, Gewel 👻				
Phone Manufacturer:	Polycom 👻					

Figure 182: Initialize MAC Address

Phone Templates: Definitions for Polycom Phones

As with Mitel phones, Polycom phones can only be created using a phone template. Create templates for Polycom phones as described in the Phone Templates section, with the differences described in the following table and shown in the following figures.



Note: The Soft Keys, Incoming Calls and Outgoing Calls tabs are not available while provisioning Polycom Trio 8800, Polycom Trio 8500 and Polycom Trio C60 phones, as the Polycom Trio 8800, Polycom Trio 8500 and Polycom Trio C60 are single line conference phones with no soft keys.

Tab / Section	Field	Setting
General		
	Name	Template name.
	Description	Description of the template.
General Settings	Type of Expansion Module	If a Polycom expansion module is attached to the phone, select the type of that module. The expansion module choices depend on the Polycom phone device type.
	Expansion Modules	Select the number of Polycom expansion modules attached to the phone, from 0 to 3.
	Use VLAN	Select the "Use VLAN" check box if the phone must be assigned to and use a VLAN.
	URI for Soft Keys	Select the URI for Soft Keys from the drop-down list. You cannot save the configuration unless you choose the URI. This entry is used to point to the appropriate EMS server for key definitions using OpEasy phone applications.
	Time Zone	Select the Time Zone from the drop-down list. Use Global Settings uses the time zone from Global Settings in Phone Templates. User Time Zone uses the time zone of the first primary user assigned to the phone. Use DHCP uses the time zone from the DHCP server. You can also select a specific time zone.
	Outbound Proxy	Enter the proxy information for this phone if you want it to appear in the Edge Device Utilization report.

Tab / Section	Field	Setting				
	Use DNS SRV Lookup	Select the Use DNS SRV Lookup option to use the Outbound Proxy Port (No Encryption) and Outbound Proxy Port (Encryption) of the DNS SRV.				
	Outbound Proxy Port	Enter the proxy information for this phone if you want it to appear in the Edge Device Utilization report.				
	Encryption (TLS/SRTP)	Select the setting for encryption.				
	Subscription Time	Use Global Settings for subscription time, or clear the Use Global Settings check box and enter the subscription time in seconds.				
Polycom Settings	Voice Volume Persistent	Select the 'Handset' and/or 'Headset' checkboxes to have the voice volume of the handset and headset remain at the same level through calls and a restart of the phone.				
	Sound Effects	Select the 'Stuttered Dial Tone for Unread Voice Mail Messages' checkbox to have a stutter played to the user and followed by dial tone when the user goes off-hook and unread voice mail messages exist in the user's mailbox.				
	Voice Quality Monitoring	Select the 'RTCP Extended Reports (RTCP XR) Enabled' check box to have the Polycom phones send RTCP messages for quality monitoring purposes.				
	Sticky Auto Line Seize	Determines whether taking the phone off-hook automatically picks up an incoming call.				
		Enter the address and/or name of the image used for the background display on a VVX phone.				
		Supported Image Formats: PNG, JPEG and BMP (Progressive and multi scan JPEG images are not supported).				
		Maximum supported image size – 600 KB				
		The following is a list of optimal background image size in pixels based on phone models:				
	Background Image URL	VVX 250 – 320x24 VVX 300, VVX310 – 208 x 104 VVX 350 – 320x240 VVX 400, VVX 410 – 320 x 240				
		VVX 450 – 480x272				
		VVX 500 – 320 x 240 VVX 600 – 480 x 272				
		This field does not apply to SoundPoint or SoundStation phones.				

Tab / Section	Field	Setting
		Enter the address and/or name of the image used for the idle display on a SoundPoint or SoundStation phone.
		Supported Image Formats: PNG and JPEG
		The following is a list of optimal background image size in pixels based on phone models:
	Idle Display Image URL	
		SoundPoint IP 32x/33x – 87 x 11
		SoundPoint IP 430 – 94 x 23
		SoundPoint IP 450 – 170 x 73
		SoundPoint IP 550/560/650 – 213 x 111
		SoundStation IP 5000 – 240 x 32
		SoundStation IP 6000 – 240 x 32
		SoundStation IP 7000 – 255 x 75
		This field does not apply to VVX phones.
Lines		
	BLF Line/User	Change the BLF Line/User if necessary. This value applies when the Busy Lamp Field (BLF) feature is assigned. The default of 1 is generally the preferred setting. The value is used to identify which line will be associated with the BLF list URI.
		Note : This option is not available while provisioning Trio 8800, Trio 8500 and Trio C60 phones.
		Select the maximum number of calls allowed for each phone line. This setting is valid for VVX phones only. The maximum number of concurrent calls supported per line depends on the model:
		VVX 101/201 = 8
		VVX 150 = 8
		VVX 250 = 24
	Max Calls Per Line	VVX 300/301/310/311 = 24
		VVX 350 = 24
		VVX 400/401/410/411 = 24
		VVX 450 = 24
		VVX 500/501/600/601 = 24
		Note : This option is not available while provisioning Trio 8800, Trio 8500 and Trio C60 phones.

Tab / Section	Field	Setting	
	Clearspan Line Position	Select the Clearspan Line Position that you want to assign. This is the Clearspan line to use for the Phone Line . A single Clearspan Line Position can appear on one or more Phone Lines , which are on separate buttons on the phone.	
	Line Label	Choose the Line Label , which determines the label shown on the phone display. Choosing Tex allows you to enter up to 16 characters of text along with the Extension, represented by the tag {Ext}, or phone number, represented by the tag {Number}. To display a name, set the Text label to "{First Name} {Last Name}" or "{Last Name}, {First Name}".	
	Ring	Select the ring to use for the specified Clearspan Line Position. The ring includes the default rings (1 to 14) and custom rings (15 to 24). The custor rings are setup on the Ring tab.	
	Missed Call Tracking	Determines whether the phone displays an updated count of missed calls and a Missed Ca List.	
	Call Fwd Ring Count	Select the number of rings to allow before initiating a no-answer call forward.	
Phone Keys			
	Key Reassignment	Enable Key Reassignment if you want to manually assign keys on the phone and expansion modules. Each key can individually b assigned as a Line, BLF List, or Favorites. At least one Line key must be assigned to the phon on the template Phone Keys tab. Otherwise, leave the setting Disabled to have th phone automatically assign the keys. When key are automatically assigned, the Line keys are assigned first, followed by the BLF List and Favorites.	
	Line Keys	On the VVX phones only, select whether Line keys on the phone are used for a BLF List, a Favorite, or a Line.	
Soft Keys			
Standard Soft Keys	Basic Call Management	On the VVX 500/501 and VVX 600/601 phones only, when this option is checked, standard soft keys will be displayed even if the phone already has a hard key for the same function. Normally, there is no reason to set this option.	
	Callers	On the SoundPoint IP 321 phone only, when thi option is checked, the Callers soft key appears o the phone so the user can see the list of receive calls.	

Tab / Section	Field	Setting
	Directories	On the SoundPoint IP 321 phone only, when this option is checked, the Directories soft key appears on the phone so the user can use a local directory.
	End Call	When checked, an End Call soft key appears on the phone.
Lines	Forward	When checked, the Forward soft key appears on the phone, allowing the user to control the different types of forwarding for received calls.
	Join	When checked, a Join soft key appears on the phone, allowing the user to join two calls into a three-way conference.
	New Call	When checked, a New Call soft key appears on the phone.
	Split	When checked, a Split soft key appears on the phone, allowing the user to split a three-way conference into two separate calls.
Soft Keys	Soft Key Position	Select the position of a specific soft key within the soft keys displayed on the phone. By selecting Floating – before standard keys or Floating – after standard keys , you can set the order of soft keys to be assigned on the phone automatically, either before or after standard soft keys. Otherwise, select Soft Key 1 to Soft Key 10 to assign the soft key to a specific soft key position. Note that the fixed position soft keys (Soft Key x) are always displayed first, followed by the Floating – before standard keys .
	Label	Configure any or all of the soft keys defined under the Key Definitions for Polycom phones. Only the keys available to Polycom phones are selectable in the Label drop-down list.
	Insert	Insert a new Soft Key within the list of Soft Keys, before the key where Insert was clicked. The key where Insert was clicked and all following keys shift down in the fixed list of Soft Keys to make room for the new keys. You will then need to properly set both the Soft Key Position and Label for the inserted key.
	Delete	Delete an existing Soft Key within the list of Soft Keys. The key where Delete was clicked is removed and all following keys shifted up in the fixed list of Soft Keys, with a new empty key placed as the last key in the list.

Features

Tab / Section	Field	Setting
		ACD Agent enables the use of Auto Call Distribution (ACD) agent sign in, sign out, available, and unavailable (without reason codes) on the phone. You must select an ACD line.
Enabled Features	ACD Agent	Available on SoundPoint® IP 320, 321, 330, 331, 335, 450, 550, 560, 650, and 670 desktop phones; VVX 101, VVX 150, VVX 201,VVX 250, VVX 300, VVX 301, VVX 310, VVX 311, VVX 350, VVX 400, VVX 401, VVX 410, VVX 411,VVX 450, VVX 500, VVX 501, VVX 600, VVX 601, 1500 business media phones.
	Feature Sync ACD	Enables Polycom's premium ACD feature. If not enabled, then only the basic capabilities of sign in, sign out, available, and unavailable (without reason codes) can be used. If enabled, then Agent Unavailable with reason codes, Queue Status Notification (for some phone models), View Incoming Call Center Information, Transfer Call Information to a Supervisor (Dispensation Code, Trace, Emergency Escalate) can be used. Available on SoundPoint® IP 320, 321, 330, 331, 335, 450, 550, 560, 650, and 670 desktop phones; VVX 250, VVX 300, VVX 301, VVX 310, VVX 311, VVX 350, VVX 400, VVX 401, VVX 410, VVX 411,VVX 450, VVX 500, VVX 501,VVX 600, VVX 601 phones.
		ACD Agent Unavailable with Reason Codes allows the agent to enter a reason code when becoming Unavailable. The set of reason codes is provisioned in the AS at the Enterprise level.
	ACD Agent Unavailable with Reason Codes	Available on SoundPoint® IP 320, 321, 330, 331, 335, 450, 550, 560, 650, and 670 desktop phones; VVX 250, VVX 300, VVX 301, VVX 310, VVX 311, VVX 350, VVX 400, VVX 401, VVX 410, VVX 411, VVX 450, VVX 500, VVX 501, VVX 600, VVX 601 phones.
	Audio/Video Toggles	On the VVX 500, VVX501 and VVX 600, VVX 601 phones with a camera only, enables the switching of the call between audio and video using a soft key.
	Bluetooth	On the VVX 600/601, Trio 8800, Trio 8500 and Trio C60 phone only, enables Bluetooth operation.
	Call List	On Polycom phones except the SoundPoint IP 321 and 331, enables the display of lists of received, placed, and missed calls using the Call List soft key.
	Corporate (LDAP) Directory	Allows an LDAP directory key to be programmed on Polycom phones.
	Local Directory	Enables the display and entry of directory entries into a directory local to the phone using the Directory soft key.

Tab / Section

Field	Setting
Enterprise Directory	Enables the Enterprise Directory feature. Available on Trio 8500, Trio 8800, Trio C60, VV2 250, VVX 300, VVX 301, VVX 311, VVX 350, VVX 400, VVX 410, VVX 401, VVX 411, VVX 450, VVX 500, VVX 501, VVX 600 and VVX 601 phones.
Group Directory	Enables the Group Directory feature. Available on VVX 250, VVX 300, VVX 301, VVX 311, VVX 350, VVX 400, VVX 410, VVX 401, VVX 411, VVX 450, VVX 500, VVX 501, VVX 600 and VVX 601 phones.
Personal Directory	Enables the Personal Directory feature. Available on VVX 250, VVX 300, VVX 301, VVX 311, VVX 350, VVX 400, VVX 410, VVX 401, VVX 411, VVX 450, VVX 500, VVX 501, VVX 600 and VVX 601 phones.
Do Not Disturb	Enables and disables the use of Do Not Disturb (DND) on the phone. When Local to the phone (managed) is enabled, DND is managed locally by the phone. When Local to the phone (managed) is not enabled, DND functionality is managed by the Clearspan server.
Enhanced Call Display	Enables the removal of the protocol "[SIP]" from the calling party identification of received calls.
Hoteling	Enables a user to use an available host phone as a guest user by logging in with their credentials. After logging in the user has access to their guess profile on the host phone. Using Hoteling in conjunction with the ACD Agent feature enables the agent to use any available host phone by logging in with agent credentials. After logging in agents have access to their guest profile and ACD settings on the host phone. You must select a Hoteling Line.
	Available on SoundPoint® IP 320, 321, 330, 331 335, 450, 550, 560, 650, and 670 desktop phones; VVX 101, VVX 201, VVX 250, VVX 300 VVX 301, VVX 310, VVX 311, VVX 350, VVX 400, VVX 401, VVX 410, VVX 411, VVX 450, VVX 500, VVX 501, VVX 600, VVX 601phones.
Last Call Return	Enables the use of last call return.
Non Volatile Ringer Volume	Enables retaining the ringer volume through restarts of the phone.
Conference Management	Enables the conferencing of multiple calls (not just a 3-way conference). To use Clearspan conferencing, select a Conference Server Address. Conference Server Addresses are configured by your administrator.

Tab / Section	Field	Setting		
	Picture Frame	On the VVX 250, VVX 350, VVX 401, VVX 411, VVX 450, VVX 500, VVX 501,VVX 600, VVX 601, Trio 8500, Trio 8800 and Trio C60 phones only, enables the display of images on the phone when idle. The images are contained in files from a device connected to the phone via a USB connection.		
	Queue Status Notification	Enables agents to view the queue status for a call center, so that they can adjust their call response accordingly. To use this feature, Premium ACD must be enabled. Available on SoundPoint® IP 450, 550, 560, 650, and Trio 8800 desktop phones.		
	Ring Download	Enables the use and download of custom rings. When enabled, the Ring tab appears to allow display and configuration of the custom rings.		
	URL Dialing	Enables dialing of calls using a URL, in addition of dialing just using digits.		
	Video	On the VVX 500/501,VVX 600/601, Trio 8500, Trio 8800 and Trio C60 phones with a camera only, enables video in calls.		
Ring				
		Selects the custom ring to assign to each of the 10 custom rings (Ring 15 through Ring 24).		
	Custom Rings	The list of available custom rings that can be assigned is obtained from the set of System Custom Rings or Enterprise Custom Rings that were configured in the Phone Templates / Global Settings. System Custom Rings only apply to system-level templates. Enterprise Custom Rings only apply to enterprise-level or group-level templates. This tab only appears when custom rings are defined.		
Extra Settings				
	Extra Settings	Enter extra settings that are to be applied to all Polycom phones using this template. The extra settings for the Polycom phones are in an XML format, as are all Polycom phone settings.		

Template Add Create a new phone template.
OK Cancel Apply
Template Name: PolycomVVX Template Level: Enterprise
Enterprise: Bulk Provisioning Lab Val, Inc
Device Type: Polycom VVX 410 (DMS)
Rebuild Status: Refresh Enterprise: None pending.
Restart Phones: 🔲 NOTE: If Restart Phones is unchecked, the template will not take effect until a resync or when the phone is rebooted.
General Lines Phone Keys Soft Keys Features Extra Settings
Name: Polycom/V/X
Description:
General Settings
Type of Expansion Module: None + URI for Soft Keys: (Select EMS Address) +
Expansion Modules: 0 - Time Zone: (Use Global Settings) -
Use VLAN: 📄 WARNING: Enabling VLAN may cause some phones to stop operating.
Outbound Proxy: 👿 Use Global Settings
Use DNS SRV Lookup
Port (No Encryption):
Port (Encryption):
Encryption (TLS/SRTP): (Use Global Settings) - WARNING: Configure encryption in the network before setting Encryption to Required.
Subscription Time: 📓 Use Global Settings
seconds
Polycom Settings
Voice Volume Persistent: Voice Volume Persiste
W Headset
Sound Effects: 🧧 Stuttered Dial Tone for Unread Voice Mail Messages
Voice Quality Monitoring: 📃 RTCP Extended Reports (RTCP XR) Enabled
Sticky Auto Line Seize: 📃 Sticky Auto Line Seize Enabled
Background Image URL:

Figure 183: Template Add - General for Polycom Phones

Template Add Create a new phone template.
OK Cancel Apply
Template Name: PolycomTrio Template Level: Enterprise Enterprise: Bulk Provisioning – Lab Val, Inc Device Type: Polycom Trio 8300 (DMS) Rebuild Status: Refresh Enterprise: None pending.
Restart Phones: NOTE: If Restart Phones is unchecked, the template will not take effect until a resync or when the phone is rebooted.
General Lines Features Extra Settings
Name: PolycomTrio Description:
General Settings
Type of Expansion Module: None URI for Soft Keys: (Select EMS Address)
Expansion Modules: 0 Time Zone: (Use Global Settings)
Use VLAN: 📗 WARNING: Enabling VLAN may cause some phones to stop operating.
Outbound Proxy: 👿 Use Global Settings
Use DNS SRV Lookup
Port (No Encryption):
Port (Encryption):
Encryption (TLS/SRTP): (Use Global Settings) VARNING: Configure encryption in the network before setting Encryption to Required.
Subscription Time: 🐷 Use Global Settings seconds
Polycom Settings
Voice Volume Persistent: 👿 Handset

Figure 184: Template Add - General for Polycom Trio Phones

Template Add Create a new phone template.						
OK Cancel Apply						
Template Name: polycom VVX						
Template Level: Enterprise						
Enterprise: Bulk Provisioning Lab	Enterprise: Bulk Provisioning Lab Val, Inc					
Device Type: Polycom VVX 410 (DMS)	5)					
Rebuild Status: Refresh Enterprise: I	None pending.					
Restart Phones: NOTE: If Restart Phones is unchecked, the template will not take effect until a resync or when the phone is rebooted. General Lines Phone Keys Soft Keys Features Extra Settings BLF Line / User: 1 Useful tags for Line Label text: {Ext}, {Number}, {FirstName}, {LastName} Max Calls Per Line: 1 1						
		Phone Line	to Clearspan Line Position Mapp	ping		
Phone Line Clearspan Line Position Phone	ne Key	Line Label			Ring	Missed Call Tracking
1 (Unassigned) V (Unas	assigned)					
2 (Unassigned) VUnas	assigned)					
3 (Unassigned) - (Unas	assigned)					
4 (Unassigned) - (Unas	assigned)					

Figure 185: Template Add – Lines for Polycom Phones

reate a new phone templa	e		
OK Cano	Apply		
Template Name:	polycom VVX		
Template Level:	Enterprise		
Enterprise:	Bulk Provisioning Lab Val, Inc		
Device Type:	Polycom Trio 8800 (DMS)		
Rebuild Status:	Refresh Enterprise: None pending.		
Restart Phones:	NOTE: If Restart Phones is unchecked, the template will not take effect until a resync or v	when the phone is rebooted.	
	Features Extra Settings		
General Lines			
General Lines	Useful tags for Line Label text: {Ext}, {Number}, {FirstName}, {LastName}		
General Lines	Useful tags for Line Label text: {Ext}, {Number}, {FirstName}, {LastName} Phone Line to Clearspan Line Position	Mapping	



Template Add Create a new phone template.
OK Cancel Apply
Template Name: polycom VVX
Template Level: Enterprise
Enterprise: Bulk Provisioning Lab Val, Inc
Device Type: Polycom VVX 410 (DMS)
Rebuild Status: Refresh Enterprise: None pending.
Restart Phones: 🔲 NOTE: If Restart Phones is unchecked, the template will not take effect until a resync or when the phone is rebooted.
General Lines Phone Keys Soft Keys Features Extra Settings
Key Reassignment: Cabled Phone Keys and Expansion Module Keys are configurable © Disabled Phone Keys and Expansion Module Keys are automatically assigned by the Polycom phone



mplate Add			
ate a new phone template.			
OK Cancel Apply			
Template Name: polycom VVX			
Template Level: Enterprise			
Enterprise: Bulk Provisioning Lab	Val Inc		
Device Type: Polycom VVX 410 (DMS			
Rebuild Status: Refresh Enterprise:	None pending.		
Restart Phones: 📃 NOTE: If Restar	t Phones is unchecked, the template will not take eff	ect until a resync or when the phone is rebooted.	
eneral Lines Phone Keys Soft K	Keys Features Extra Settings		
Standard Soft Keys			
	Il Management (Hold, Transfer, Conference soft ke	evs redundant to hard kevs)	
End Call		New Call	Split
Join		Callers	Forward
		- Odielo	in tormana
		Soft Keys	
Soft Key Position	Label	Soft Keys Insert	Delete
Soft Key Position Floating - after standard keys			Delete <u>Delete</u>
Soft Key Position Floating - after standard keys • Floating - after standard keys •	Label	Insert	
Floating - after standard keys 💌	Label ((Select Key) +	Insert Insert	Delete
Floating - after standard keys Floating - after standard keys	Label (Select Key) • (Select Key) •	Insert Insert Insert	Delete Delete
Floating - after standard keys • Floating - after standard keys • Floating - after standard keys •	Label ((Select Key)) * ((Select Key)) * ((Select Key)) * ((Select Key)) *	Insert Insert Insert Insert	Delete Delete Delete

Figure 188: Template Add – Soft Keys for Polycom Phones

Template Add Create a new phone template.
OK Cancel Apply
Template Name: polycom VVX
Template Level: Enterprise
Enterprise: Bulk Provisioning Lab Val, Inc
Device Type: Polycom VVX 410 (DMS)
Rebuild Status: Refresh Enterprise: None pending.
Restart Phones: 🔲 NOTE: If Restart Phones is unchecked, the template will not take effect until a resync or when the phone is rebooted.
General Lines Phone Keys Soft Keys Features Extra Settings
Feature Enable
Enabled Features: ACD Agent ACD Line: (Select Line)
Feature Sync ACD
Agent Unavailable with Reason Codes
🐷 Call List
Gorporate (LDAP) Directory
Local Directory
Enterprise Directory
Group Directory
Personal Directory
Do Not Disturb Local to phone
Enhanced Call Display
Hoteling Hoteling Line: (Select Line)
Last Call Return
Conference Management

Figure 189: Template - Features for Polycom Phones

Template Add Create a new phone template.
OK Cancel Apply
Template Name: polycom VVX
Template Level: Enterprise
Enterprise: Bulk Provisioning – Lab Val, Inc
Device Type: Polycom VVX 410 (DMS)
Rebuild Status: Refresh Enterprise: None pending.
Restart Phones: 🔲 NOTE: If Restart Phones is unchecked, the template will not take effect until a resync or when the phone is rebooted.
General Lines Phone Keys Soft Keys Features Extra Settings
Choose File to Upload Extra Settings Content Upload File

Figure 190: Template – Extra Settings for Polycom Phones



Note: OpEasy analyzes the Template Extra Settings to determine if there are any parameters in the Extra Settings that are being overridden by the Template settings or are overriding the Template settings. If parameters that correspond to any of the Template settings are found in the Extra Settings, then **Template Definitions: Extra Settings Audit Results** page is displayed, indicating the extra settings parameters that conflict with the Template settings configuration.

Polycom Phone Users

When creating a user or adding a phone to an existing user, any phone device created for that user may be a Polycom phone. An OpEasy 3rd Party License is required for each added or modified Polycom phone. An error message appears if no license is available.

User Device Settings for Polycom Phones

For any of the supported Polycom phones, the Device Access: User Name and Password fields appear and are *required* for definition of the phone. Valid password characters are a-z, A-Z, 0-9, blank, or special characters: -___, ! % & * + / = ? ^ { } .

When a phone uses device credentials, the MAC Address field is optional. However, if entered for a Polycom phone, the contents of the MAC Address field MUST be valid, matching the MAC address of the physical Polycom phone assigned to that phone device. The Polycom phone will not be able to load its configuration files if an incorrect MAC address is entered. Therefore, it is highly recommended to leave the MAC Address field empty. If Polycom Phone Support licensing is installed and enabled, the MAC address is automatically provisioned when the phone starts up.

Advanced: User Add Select a User Profile and complete the user inform	nation to add a new Clearspan user.
OK Cancel	
Enterprise: Moorehouse Group: Relyks User: Como, Polly Service: ((Select Service)	Moore Enterprises of Texas
User Optional Phones Announcemen	
Hara Chara Frankan	(Close Other Tabs)
User Classification User Profile: 68899 Teste	15 👻
Clearspan User	
* Last Name: Como	* First Name: Polly
E-mail Address: polly.como	Dmoorehouse.com
Use Org	anization ID
Account ID:	
User Billing Type: Default: (US	ER) 👻
Department: (None) +	
Phone Number: 476-555-20	04 💌 OActivated 💿 DeActivated
Extension: 2004	
Network Server Site: DFLT_SITE	Default Site
Primary Phone: View Pho	ne Template
Phone Location: 8th floor bri	dge (as directed, i.e.: mailing address, building, or office)
Voice Mail: Voice Mail	No E-mail Notification *
Voice Portal Passcode: 120450	(create a numeric passcode of 4 to 8 digits)
Confirm Portal Passcode:	
* Licer Password:	/

Figure 191: Advanced User Add for Polycom Phones (Top)

Clearspan® OpEasy® Advanced Provisioning Guide

New User Notification	
New User Notification:	Send E-mail Message to New User
	Send E-mail Message to OpEasy Administrator
(Send E-mail Message to Phone Procurement:
	* E-mail Address:
User Information	
Site ID:	(Required to create Extension-only users)
* Clearspan User ID:	polly.como @ moorehouse.com +
Support User:	
Calling Line ID	
* Last Name:	Como 1First Name: Polly
Phone Number:	
Service Packs	
Select all Service Packs req	mind hu the Licer
	arvice Packs User Service Packs
Premium2	Add > Basic
	Remove <
	Add All >>
	Remove All <<
Authentication	
Name:	polly.como
Password:	
Confirm Password:	
Commit assword.	Initialize Authentication Password to random password
Primary Phone Device	
* Device Name:	Polycom/VX410DMS-4785552004
Device Level:	Group 💌
* Line / Port:	4765552004.primary @ moorehouse.com *
VLAN ID:	(VLAN is not enabled in the template)
	Warning: Modifying the VLAN ID may cause the phone to stop operating.
* MAC Address:	000011382004 (Device's MAC Address or Auto Install Device ID)
ERL Record Name:	

Figure 192: Advanced User Add for Polycom Phones (Bottom)

User: Prin	narv Ph	one De	vice Add						
Add a phone device	e as the prima	y phone for th	e user. *Pressing OK re		entered changes. To sav	ve the changes, press OK	or Apply on the subseque	ent page.	
OK*	Cancel	Manage U	sers Custom Ta	ags					
		Relyks	e Moore Enterprises o	of Texas					
Phone D	ovice								
	Phone Device	(Now Phor	ne Device) 👻						
	Device Name								
	Device Level								
	Device Type:	Polycom V	VX 410 (DMS) 🔹						
	Template	(Select Ter	mplate) 👻						
		View Ter	nplate						
User L	ine								
0.501	* Line / Port	485552004	4.primary		moorehouse.com				
		1st Phone L	ine			-			
Device Des									
Device Des	Description								
	Serial Number								
	hone Location								
-	none Location								
Device Oracle	·								
Device Cont	e / IP Address						Dest -		
							Port:	J	
0	Itbound Proxy								
	Stun Server								
	MAC Address			e's MAC Address)					
	Device Access		me: 465552004						
			ord: 2004						
	- (Confirm Passw	ord: 2004						
D	evice Protocol	SIP 2.0							
Tran	sport Protocol	Unspecifie	d 👻						
ERL	Record Name								
	-								
Encryptio	n (TLS/SRTP)								
					Phone Device User				
Last Name 👌	First Na	me 👌	Department 👌	Phone Number 👌	Extension ©	User ID 👌	Line / Port 👌	Type 👌	Position ©
						@moorehouse.com		Primary	1

Figure 193: User Primary Phone Device Settings for Polycom Phones

User General Settings for Polycom Phones

As with Mitel phones, when creating a user with a Polycom phone as the primary phone, an E-mail message can be sent to that user to notify of the new phone. Mitel phones and Polycom phones have a different new user E-mail message because of the differences in setting up the phones.

To set up the new user E-mail notification message for a Polycom phone from the Users page of Provisioning, click General Settings and New User E-mail Notification. Then, select the specific enterprise and Polycom from the Phone Manufacturer drop-down list. Change the new user E-mail message as you would for a Mitel phone, with the text appropriate for a Polycom phone.

User General Settings: New User E-mail Notification Display and modify the E-mail message that is sent to new users based on phone type. The E-mail notification typically provides instructions on phone setup.	
OK Cancel Apply Save As System-Wide Default	
Enterprise: Moorehouse Moore Enterprises of Texas	
Phone Manufacturer: Polycom +	
New User E-mail Message:	
Enter or modify the 'From' address, 'Subject' line, and body of the E-mail message that is to be sent to new phone users. The subject line and message body can contain any of the substitution tags (identified by {} braces) listed at the bottom of the page. When the E-mail is sent, these tags are replaced by the appropriate user-specific information.	
The text between (CCDesktopStart) and (CCDesktopEnd) is sent only when the new user has a Clearspan Communicator - Desktop device configured. Similarly the text between (CSEngageDesktopStart) and (CSEngageDesktopEnd) is sent for a CS Engage - Desktop device, between (CCS485tart) and (CCS48End) is sent for a Clearspan Communicator - S4B device, between (CSEngageMobileStart) and (CSEngageMobileEnd) is sent for a CS Engage - Mobile device, between (CCMobileStart) and (CCMobileEnd) is sent for a CSEngage - Desktop device, Communicator - Mobile device, and between (CCTabletStart) and (CCMobileStart) and cCMobileEnd) is sent for a Clearspan Communicator - Mobile device, and between (CCTabletStart) is sent for a Clearspan Communicator - Tablet device.	
Similarly, the (DMMACAddressStart) and (DMMACAddressEnd) tags surround text only sent when the user's phone device is configured using the device's MAC Address. The (DMCredentialsStart) and (DMCredentialsEnd) tags surround text only sent when the user's phone device is configured using the device's credentials (access User Name and Password).	
Reset to System-Wide Default Clear	
From: No-Reply@tb20ems1public.cslab.mitel.com	
Subject: Your New Polycom Phone	
Greetings (UserName):	
(DMMACAddressStart)	
(DMMACAddressStart) Your organization has provided you with a new Polycom (PhoneModel) phone. Setup your phone as described in the installation instructions provided with the phone. (DMMACAddressEnd) (DMCedentialsStart)	
Your organization has provided you with a new Polycom {PhoneModel} phone. Setup your phone as described in the installation instructions provided with the phone. (DMMACAddressEnd)	
Your organization has provided you with a new Polycom (PhoneModel) phone. Setup your phone as described in the installation instructions provided with the phone. (DMMACAdressEnd) (DMCedentialsStart)	
Your organization has provided you with a new Polycom (PhoneModel) phone. Setup your phone as described in the installation instructions provided with the phone. (DMMACAddressEnd) (DMCredentialsStart) Your organization has provided you with a new Polycom (PhoneModel) phone. The following steps are required to install and activate your new phone:	

Figure 194: User General Settings E-mail Notification for Polycom Phones

Phone Management for Polycom Phones

As with Mitel phones, Polycom phones can also be added or modified under the Phone Management page of Provisioning.

Phone Device Mo lodify an existing Clearspan phon	
OK Cancel	Apply Manage Users Custom Tags Custom Rings Replace Phone
Enterprise:	Bulk Provisioning Lab Val, Inc
Group:	Group_G Group, Gewel
Phone Device	
Device Name:	PolycomVVX310DMS- <u>9722221005</u>
Device Level:	
Device Type:	
Support Device:	No
Template:	Grp_VVX310 (Group) DisplayedExt
	View Template
	Restart Phones on Save
Device Description	
Device Description Description:	
Serial Number:	
Phone Location:	Somewhere over the Rainbow
Device Configuration	
Host Name / IP Address:	Port:
Outbound Proxy:	
Stun Server:	
MAC Address:	
Device Access:	User Name: 9722221005
Re	set Password:
Confi	rm Password:
Device Protocol:	SIP 2.0
Transport Protocol:	Unspecified •
VLAN ID:	(VLAN is not enabled in the template)
	WARNING: Modifying the VLAN ID may cause the phone to stop operating.
ERL Record Name:	Test_05
Encryption (TLS/SRTP):	None
Lines/Ports:	

Figure 195: Phone Device Modify for Polycom Phones

Appendix B: OpEasy Setup for Panasonic Phones

OpEasy supports the provisioning of Panasonic KX-TGP600 phone model. The phone can support a maximum of 8 handsets. The following settings must be configured within OpEasy prior to installing Panasonic phones at users' desks, as described in the following sections:

- User Profiles One or more User Profiles must be created so that the administrator can build Panasonic phones for provisioning.
- Phone Templates

Key Definitions – In addition to the Panasonic standard soft keys, some OpEasy-configured soft keys may be assigned to Panasonic phones.

Global Settings – System, Enterprise, and Group level settings must be configured for Panasonic phones.

Definitions – One or more templates must be created for the Panasonic phone.

Notes:

2

2

- For new settings added to Templates and Global Settings, the '(Unspecified)' selection option or text value is displayed. The '(Unspecified)' value indicates no value has ever been set, causing OpEasy to NOT generate configuration file fields for that new OpEasy setting. As such, any existing Global Extra Settings for that configuration file field continue to be used. However, once a setting has been changed to an actual value (replacing the '(Unspecified)' value), then OpEasy generates configuration file fields for that setting from then on. These actual values then override any Global Extra Settings for that field. After a value is selected to replace the '(Unspecified)' value, the '(Unspecified)' value, the '(Unspecified)' value is no longer an option.
- You can configure extra settings only if you have the full access privilege to view and edit extra settings.
- Users:- Users must be created with a Panasonic phone.
- Phone Management Panasonic phones can be added or modified under the Phone Management page of Provisioning.

Note: For Panasonic phones, OpEasy does not support Auto Install and MAC Address Capture like the Mitel and Polycom phones, respectively. For security reasons and to help in managing the Panasonic phones, the MAC address of the base station must be entered when provisioning the Panasonic device in OpEasy.

In addition, the following phone capabilities and features are not supported: the Panasonic phone's "Import/Export" Phonebook feature, Shared Call Appearances (SCAs), Busy Lamp Field (BLF), ACD, and Multicast paging.

User Profiles for Panasonic Phones

In order to allow administrators to quickly set up users with Panasonic phones, one or more User Profiles should be created. When creating a User Profile, the administrator selects the Panasonic phone as the Device Type. The Panasonic phone will be created as the primary phone device for the new user. "MAC Address" is the device's MAC address and not auto generated.

Phone Templates for Panasonic Phones

Key Definitions for Panasonic Phones

The OpEasy soft keys are configured on the Key Definitions page for provisioning Phone Templates. Key Definitions are typically accessible by system administrators only, as they affect keys system wide.

When Panasonic is selected as the Phone Manufacturer on the Key Definitions page, definitions specific to Panasonic phones are displayed.

Key Definitions Display and configure system and per enterprise keys.						
OK Cancel Apply	OK Cancel Apply Add Copy System Keys					
Enterprise: Bulk Provisioning Lab Val, Inc +						
Template Keys: Enterprise Keys Only (Keys available to use in templates of the selected enterprise)						
Phone Manufacturer: Panasonic 👻						
Rebuild Status: Refresh Ente	rprise: None pending.					
	Key Definit	ons				
Type 👌	Label 👌	Value 👌				
Programmable Soft Key	Call Park	*68				
Idle Soft Key	Incoming Call Log					
Idle Soft Key	Intercom Call					
Idle Soft Key	Menu					
Idle Soft Key	Outgoing Call Log					
Idle Soft Key	Page					
Idle Soft Key Idle Soft Key	Page PhoneBook					

Figure 196: Key Definitions for Panasonic Phones

Phone Templates: Global Settings for Panasonic Phones

The following settings are configured on the Phone Templates / Global Configuration File Settings page of Provisioning.

System, Enterprise, and Group Extra Settings for Panasonic Phones

To enter extra settings that are to be applied to all Panasonic phones within the scope of the level, choose **Phone Templates** from the **Provisioning** menu, select **Global Settings**, the **Global Configuration File Settings** tab opens.

To edit extra settings for the group, select **Enterprise**, **Group** and **Phone Manufacturer**, click **Extra Settings**, the **Extra Settings** tab opens, click **Group Extra Settings**, and Click **OK** on the confirmation box (the confirmation box displays "Updating Extra Settings is potentially dangerous. Are you sure you want to update Extra Settings?"). Enter the extra settings in the **Group Extra Settings** box and Click **OK**, the **Global Configuration File Settings: Rebuild Configuration Files** page opens. Click **Save and Rebuild** to save the Template changes and rebuild all configuration files using this template.

Only Group Administrators and above can create or modify Group Extra Settings.

To edit extra settings for the enterprise, select Enterprise, Group and Phone Manufacturer, click Extra Settings, the Extra Settings tab opens, click Enterprise Extra Settings, and Click OK on

the confirmation box (the confirmation box displays, "Updating Extra Settings is potentially dangerous. Are you sure you want to update Extra Settings?"). Enter the extra settings in the **Enterprise Extra Settings** box and Click **OK**, the **Global Configuration File Settings: Rebuild Configuration Files** page opens. Click **Save and Rebuild** to save the Template changes and rebuild all configuration files using this template.

Only Enterprise Administrators and above can create or modify Enterprise Extra Settings.

To edit extra settings for the system, select **Enterprise**, **Group** and **Phone Manufacturer**, click **Extra Settings**, the **Extra Settings** tab opens, click **System Extra Settings**, and Click **OK** on the confirmation box (the confirmation box displays, "Updating Extra Settings is potentially dangerous. Are you sure you want to update Extra Settings?"). Enter the extra settings in the **System Extra Settings** box and Click **OK**, the **Global Configuration File Settings: Rebuild Configuration Files** page opens. Click **Save and Rebuild** to save the Template changes and rebuild all configuration files using this template.

Only System Administrators and Super Users can create or modify the System Extra Settings.

OpEasy analyzes the Group, Enterprise, or System Extra Settings to determine if the parameters in the Extra Settings are being overridden by the General Settings or Dial Plan Settings, or if the parameters in the Extra Settings are overriding the General Settings or Dial Plan Settings. If parameters that correspond to any of the General Settings or Dial Plan Settings are found in the Global Extra Settings, then the **Global Configuration File Settings: Extra Settings Audit Results** page is displayed, indicating the extra settings parameters that conflict with the Global Settings configuration.

DK Cancel	Apply		
	k Provisioning Lab Val, Inc		
· · · ·	up_Pronto Pronto's Group *		
Phone Manufacturer: Par	nasonic 👻		
eral Settings Extra Settin	ngs System Config File Extension Dial Pl	lan	
	Group Settings	Enterprise Settings	System Settings
Refrech Rebuild Status	Force Group Rebuild No rebuilds pending in Group.	Force Enterprise Rebuild No rebuilds pending in Enterprise.	Force System Rebuil No rebuilds pending in System.
	No rebuilds pending in Group.	No rebuilds perioring in Enterprise.	No rebuilds pending in System.
SIP Settings	Use Enterprise Setting	Use System Setting	
Outdound Proxy.	mighty.spork.woof	10.70.100.89	10.70.100.69
	Use DNS SRV Lookup	Use DNS SRV Lookup	Use DNS SRV Lookup
Denvis Read (Na Constration):		5080	5080
Proxy Port (No Encryption):			
Proxy Port (Encryption):			
Encryption (TLS/SRTP):	(Use Enterprise Setting) -	Not Allowed 👻	
Encryption Certificate File:		Entrust_Root.ort	
	Configure encryption in the network first.		
Subscription Time:	Use Enterprise Setting	Use System Setting	360
DNS Servers			
Enable DNS:	(Use Enterprise Setting)	Enabled -	Enabled +
Primary DNS Server:		10.70.103.64	10.70.103.64
Secondary DNS Server:		10.70.2.1	10.70.2.1
Time Settings			
Time Server:	Use Enterprise Setting	Use System Setting	
		10.70.103.64	10.70.103.64
Time Zone:	(Use Enterprise Setting) 👻	(User Time Zone) 👻	(User Time Zone) 👻
Device Settings			
	Use Enterprise Setting Password	Use System Setting Password	
Admin Password:		******	****
Confirm Admin Password:		******	****
	Use Enterprise Setting Password	Use System Setting Password	
User Password:		*******	*****
Confirm User Password:		****	*****
Voice Codecs	(Wideband is enabled for G.722 or G.722.2)	(Wideband is enabled for G.722 or G.722.2)	(Wideband is enabled for G.722 or
Voice Codec Setting:	Use Enterprise Setting	Use System Setting	
Voice Codec #1:	(None) - (highest priority)	(None) (highest priority)	(None) - (highest priority)
Voice Codec #2:		(None) -	(None) -
Voice Codec #3:		(None) -	(None) -
Voice Codec #4:		(None) -	(None) -
Voice Codec #5:		(None) (lowest priority)	(None) v (lowest priority)
tobe oblec #0.	(contact priority)	(order promy)	(concy - (correst priority)
SNMP Settings			
SNMP Settings SNMP Enable:	(Use Enterprise Setting)	(Use System Setting)	Off +
SNMP Enable: SNMP Server Address:	(mmerginate setting/	(core of start or string)	
SNMP Server Address: SNMP Server Port:	161	[181]	161
anwin berver Port:			
Quality Monitoring			
Quality Monitoring:	(Use Enterprise Setting) 🔹	Off -	Off -
Collector Server Address:			
Collector Server Port:	5080	5080	
Alert Report MOSQ Critical:	0		
Alert Report MOSQ Warning			24
	Ľ		L47
Handset Settings			
Power on Display Logo Path:	🐷 Use Enterprise Setting	Use System Setting	
	-		
Display Wallpaper Dark Path:	Use Enterprise Setting	Use System Setting	
Display Wallpaper Light Path:	Use Enterprise Setting	Use System Setting	
Capitaly Walipaper Light Path:	ose Enterprise detung	Ose System Setting	

Figure 197: Global Settings for Panasonic Phones

Global Configuration File Settings Display and change the global Clearspan settings for a selected Phone Manufacturer. After being saved, the change occurs at the next resync or reboot of the affected phones.
OK Cancel Apply
Enterprise: Bulk Provisioning Lab Val, Inc + Group: Group_Pronto Pronto's Group +
Phone Manufacturer: Panasonic -
General Settings Extra Settings System Config File Extension Dial Plan
Group Extra Settings
Choose File Upload File
Enterprise Extra Settings
######################################
Choose File Upload File
System Extra Settings

Figure 198: Global Extra Settings for Panasonic Phones



Note: For integration with Clearspan, Panasonic phone firmware must be version 3.2 or later.

System, Enterprise, and Group System Configuration File Extension Settings for Panasonic Phones

The Device Type for each Panasonic phone model includes a **KX-TGP600.cfg** file that contains system-wide configuration settings used in the configuration files for all Panasonic phones of that phone model. These settings can be extended by choosing **Phone Template** from the **Provisioning** menu, selecting **Global Settings** and selecting **Panasonic** as the Phone Manufacturer, clicking on the **System Config File Extension** tab, and entering the additional settings on that tab.

Note that the KX-TGP600.cfg file and the settings on the System Config File Extension tab have a lower-priority than ALL other Global Settings (including Global Extra Settings) and Template Settings. However, the System Config File Extension tab settings have higher-priority than the settings in the KX-TGP600.cfg file being extended.

Only Super Users and System Administrators can access the **System Config File Extension** Settings.

Global Configuration File Settings Display and change the global Clearspan settings for a selected Phone Manufacturer. After being saved, the change occurs at the next resync or reboot of the affected phones.
OK Cancel Apply
Enterprise: Bulk Provisioning Lab Val, Inc + Group: Group_Pronto Pronto's Group +
Phone Manufacturer: Panasonic *
General Settings Extra Settings System Config File Extension Dial Plan
System Config File Extension
REG_EXPIRE_TIME_1?r=3800' REG_EXPIRE_TIME_3?r=3800' REG_EXPIRE_TIME_4?r=3800' REG_EXPIRE_TIME_6?r=3800' REG_EXPIRE_TIME_6?r=3800' REG_EXPIRE_TIME_6?r=3800' REG_EXPIRE_TIME_6?r=3800' REG_EXPIRE_TIME_6?r=3800' REG_EXPIRE_TIME_7?r=3800' REG_EXPIRE_TIME_7?r=3800' REG_EXPIRE_TIME_7?r=3800'
Choose File Upload File

Figure 199: System Config File Settings for Panasonic Phones

OK Concel Addy Entraprize Entraprize Entraprize Entraprize Entraprize Entraprize Entraprize Entraprize Prices Mandaduze Presence Dial Plan Benezal Satings Use Entraprise Dial Plan Benezal Satings Use Entraprise Dial Plan Dial Plan Satings Use System Sating Dial Plan Dial Plan Satings Dial Plan Dial Plan Enterprise Dial Plan Dial Plan Dial Plan Dial Plan Satings Use System Sating Dial Plan Dial Plan Satings Use System Sating Dial Plan Enterprise Dial Plan Dial Plan Dial Plan	Global Configuration File Settings Display and change the global Clearspan settings for a selected Phone Manufacturer. After being saved, the change occurs at the next resync or reboot of the affected phones.
Orus Erus Function Prove thankature: Extension Balak Mace Darge Data Parts Orus Balak Mace Darge Data Parts Output Data Particular Stating: Unternational Cala Parts: Output Data Data Parts Stating: Use System Stating: Use System Stating: Data Parts Stating: Use System Stating: <t< td=""><td></td></t<>	
Concred Latting: Futra Stelling: Retrait Dick Mode See Dual Para Dial Para Stelling: Unit Para Stelling:	
Read December 2	Phone Manufacturer: Panasonic •
Read December 2	General Settings Extra Settings System Config File Extension Dial Plan
Coup Dud Par Dal Pan Senger Use Trence: Immensional Cal Patie: County Caling Cole National Access Cole National Access Cole Bengerey Cali 4: Entergerey Cali 4: Entergerey Cali 4: Entergerey Cali 4: Immensional Cal Patie: Immensional Cal Patie: National Access Cole National Access Cole Bengerey Cali 4: Entergerey Cali 4: Immensional Cal Patie: Immensional Cal Patie: Immensional Cali Patie:	
Dur Pan Setting: Ur Bettergeries Betting: Digt Treesz: Textorial Coll International Call Petro: Courty Calling Cole: Disparent Call Petro: Emergency Call #1 Emergency Call #2 Emergency Call #2 Emergency Call #3 Emergency Call #3 Emergency Call #4 Emergency Call #4 Emergency Call #3 Emergency Call #3 Emergency Call #4	Refresh Block Mode
Dur Pan Setting: Ur Bettergeries Betting: Digt Treesz: Textorial Coll International Call Petro: Courty Calling Cole: Disparent Call Petro: Emergency Call #1 Emergency Call #2 Emergency Call #2 Emergency Call #3 Emergency Call #3 Emergency Call #4 Emergency Call #4 Emergency Call #3 Emergency Call #3 Emergency Call #4	Group Dial Plan
Dgit Timeoiz imensional Call Prefix Courty Calling Code Emergency Call #: Emergency	
International Call Parls: Country Calling Code Nistorial Access Code Brangenoy Calli 11: Emergenoy Calli 12: Emergenoy Calli 12: Emergenoy Calli 12: Emergenoy Calli 12: Dal Plan Setting: I Plan Thread Setting: I Plan Thread Setting: I Plan Thread Setting: I Plan Setting: I Plan Thread Setting: I	
County Calling Code National Access Code Emergency Calling: Dial Plan Dial Timeout: Stational County Calling Code: Dial Plan Emergency Calling: Use System Setting: Dial Plan Stational Calli Prefix: County Calling Code: Emergency Calling:	
County Calling Code National Access Code Emergency Calling: Dial Plan Dial Timeout: Stational County Calling Code: Dial Plan Emergency Calling: Use System Setting: Dial Plan Stational Calli Prefix: County Calling Code: Emergency Calling:	
County Calling Code National Access Code Emergency Calling: Dial Plan Dial Timeout: Stational County Calling Code: Dial Plan Emergency Calling: Use System Setting: Dial Plan Stational Calli Prefix: County Calling Code: Emergency Calling:	International Call Prefix
National Access Code Emergency Call #2 Emergency Call #3 Emergency Call #4 Emergency Call #4 Emergency Call #3 Dial Plan Settings: Use System Setting: Over State System Setting: Digit Timeout: System Setting: System Setting: System Setting: System Dial Plan	
Emergency Call #2 Emergency Call #3 Emergency Call #4 Emergency Call #3 Emergency Call #3 Emergency Call #3 Dial Plan Dial Plan Setting: Use System Setting: Digt Timeout: Seconds	
Emergency Call #3 Emergency Call #4: Emergency Call #4: Emergency Call #5: Dial Plan Setting: Use System Setting: Digt Timeou: Seconds International Call Prefix: Country Call #3: Emergency Call #4:	Emergency Call #1:
Emergency Call #4 Emergency Call #5 Dial Plan Settings: Use System Setting Digit Timeout: Seconds	Emergency Call #2:
Emergency Call #5: Enterprise Dial Plan Dial Plan Setting: Digit Timeot: Seconds International Call Prefix: Country Calling Code: National Access Code: Emergency Call #1: Emergency Call #2: Emergency Call #3: Emergency Call #4:	Emergency Call #3:
Enterprise Dial Plan Dial Plan Setting: Digit Timeout: Seconds Imagency Call #2: Enterprise Call #2: Enterprise Call #2: Enterprise Call #2: Enterprise Call #2: Entergroup Call #2:	Emergency Call #4:
Dial Plan Setting: Ugit Timeout: Seconds Image: Seconds Image: Seconds International Call Prefix: Outry Calling Code: National Access Code: Emergency Call #1: Emergency Call #2: Emergency Call #3: Emergency Call #4: Emergency Call #5: System Dial Plan	Emergency Call #5:
Dial Plan Setting: Ugit Timeout: Seconds Image: Seconds Image: Seconds International Call Prefix: Outry Calling Code: National Access Code: Emergency Call #1: Emergency Call #2: Emergency Call #3: Emergency Call #4: Emergency Call #5: System Dial Plan	Enterorise Dial Plan
Digit Timeout: Seconds Sock System Dial Plan	
[5-800X 972000000X 971 International Call Prefix: 000000000000000000000000000000000000	
[5-600XX 972XXXXXXX 972XXXXXXX 973XXXXXX 974 International Call Prefix: Country Calling Code: National Access Code: Emergency Call #1: Emergency Call #2: Emergency Call #3: Emergency Call #4: Emergency Call #5:	2004
Country Calling Code: National Access Code: Emergency Call #1: Emergency Call #2: Emergency Call #3: Emergency Call #4: Emergency Call #5:	[5-8)XX 33XXXX 9722X0XXX 972222212XX 47XXXX 847XXXX 847XXXX #XX *XX
Country Calling Code: National Access Code: Emergency Call #1: Emergency Call #2: Emergency Call #3: Emergency Call #4: Emergency Call #5:	International Call Prefix:
Emergency Call #1: Emergency Call #2: Emergency Call #3: Emergency Call #4: Emergency Call #5:	
Emergency Call #2: Emergency Call #3: Emergency Call #4: Emergency Call #5:	
Emergency Call #3: Emergency Call #4: Emergency Call #5:	Emergency Call #1:
Emergency Call #4: Emergency Call #5: System Dial Plan	
Emergency Call #5: System Dial Plan	
System Dial Plan	
	Emergency Gall #5:
	System Dial Plan

Figure 200: Global Settings – Dial Plans Tab for Panasonic Phones

Click Dial Plan to enter dial plan information for System, Enterprise, or Group levels or click **Use Enterprise Setting** to use enterprise settings, or click **Use System Setting** to use system settings. The dial plan information entered must be in Panasonic format and can include any Panasonic-specific setting.

Group Settings for Panasonic Phones

To configure group-specific Panasonic phone settings, choose Phone Templates from the Provisioning menu, and then select Global Settings and click on Group Panasonic Phone Settings. The common group settings for Panasonic phones are described in the following table.

Field	Setting
SIP Settings	
Outbound Proxy	Enter the hostname or IP address of the outbound proxy server used by the Panasonic phones.
Use DNS SRV Lookup	Select the Use DNS SRV Lookup option to use the Outbound Proxy Port (No Encryption) and Outbound Proxy Port (Encryption) of the DNS SRV.
Outbound Proxy Port (No Encryption)	Enter the port number for the outbound proxy server used by the Panasonic phones when encryption is not used by the Panasonic phone. The port number may be 0, 5060, or another port.
Outbound Proxy Port (Encryption)	Enter the port number for the outbound proxy server used by the Panasonic phones when encryption is used by the Panasonic phone.
Encryption (TLS/SRTP)	Select the setting for encryption.
Encryption Certificate File	Name for the certificate file; must be entered if Encryption is set to Required.
DNS Servers	
Enable DNS	Enable or disable DNS.
Primary DNS Server	Server address for primary DNS server.
Secondary DNS Server	Server address for backup DNS server.
Time Settings	
Time Server	Enter the hostname or IP address of a timer server.
Time Zone	Select the time zone that the phones are in.
Device Settings	
Admin Password	Enter a password that is entered into the phone to access the advanced settings within the phone.
User Password	Enter a password that is entered into the phone to access the user settings within the phone.
Voice Codece	

Voice Codecs

Field	Setting
	Identify the voice codecs that the phone is to use when placing or receiving calls. The codecs are in priority order, with codec #1 as the highest priority codec to codec #5 as the lowest priority codec. Wideband is enabled if G.722 or G.722.2 is selected. Voice Codec options include the following:
Voice Codec #1 to #5	• G.722
	• G.711 u-Law
	• G.722.2
	• G.729A
	• G.711 A-law
SNMP Settings	
SNMP Enable	Enable or disable SNMP.
SNMP Server Address	Hostname or IP address of SNMP server.
SNMP Server Port	Port for SNMP server.
Quality Monitoring	
Quality Monitoring	Choose whether periodic and/or session quality monitoring is used.
Collector Server Address	Enter the hostname or IP address of the server to which quality monitoring messages are sent by the phone.
Collector Server Port	Enter the port to use on the collector server. The default port number is 5060.
Alert Report MOSQ Critical	Criteria (critical) to send the VQ report when the MOSQ occurs.
Alert Report MOSQ Warning	Criteria (warning) to send the VQ report when the MOSQ occurs.
Handset Settings	
Power on Display Logo Path	URI for logo image file displayed when power is turned on.
Display Wallpaper Dark Path	Specifies the wallpaper for DARK display setting in IDLE mode.
Display Wallpaper Light Path	Specifies the wallpaper for LIGHT display setting in IDLE mode.
General Settings	
Conference Server	Specifies the conference server to use for conference calls.
Firmware File	Text Field that contains the URL of the firmware file to be loaded.

Phone Templates: Definitions for Panasonic Phones

As with Mitel phones, Panasonic phones can only be created using a phone template. Create templates for the Panasonic phone as described in the *Phone Templates* section, with the differences described in the following table and shown in the following figures.

Tab / Section	Field	Setting
General		
General Settings	Time Zone	Select the Time Zone from the drop-down list. Use Global Settings uses the time zone from Global Settings in Phone Templates. User Time Zone uses the time zone of the first primary user assigned to the phone. Use DHCP uses the time zone from the DHCP server. You can also select a specific time zone.
	URI for Soft Keys	Select the URI for Soft Keys from the drop-down list. You cannot save the configuration unless you choose the URI. This entry is used to point to the appropriate EMS server for key definitions using OpEasy phone applications.
	Use VLAN	Select the "Use VLAN" check box if the phone must be assigned to and use a VLAN.
	Outbound Proxy	Enter the proxy information for this phone if you want the information to appear in the Edge Device Utilization report.
	Use DNS SRV Lookup	Select the Use DNS SRV Lookup option to use the Outbound Proxy Port (No Encryption) and Outbound Proxy Port (Encryption) of the DNS SRV.
	Outbound Proxy Port	Enter the proxy information for this phone if you want the information to appear in the Edge Device Utilization report.
	Encryption (TLS/SRTP)	Select the setting for encryption.
	Encryption Certificate File	Name for the certificate file; must be entered if Encryption is set to Required.
	Subscription Time	Use Global Settings for subscription time, or clear the Use Global Settings check box and enter the subscription time in seconds
Panasonic Settings	Voice Quality Monitoring	Select the 'RTCP Extended Reports (RTCP XR) Enabled' checkbox to have the Panasonic phones send RTCP messages for quality monitoring purposes.
	Conference Server	Select the conference server to use for conference calls.
	Hand Set Display Names	Select the name to display on the handset in standby mode.
Lines		
	Clearspan Line Position	Select the Clearspan Line Position that you want to assign. This is the Clearspan line to use for the Phone Line . A single Clearspan Line Position can appear on one or more Phone Lines , which are on separate buttons on the phone.

Tab / Section	Field	Setting
	Line Label	Choose the Line Label, which determines the label shown on the phone display. Choosing Text allows you to enter up to 16 characters of text along with the Extension, represented by the tag {Ext}, or phone number, represented by the tag {Number}. To display a name, set the Text label to "{First Name} {Last Name}" or "{Last Name}, {First Name}". When a single number is used for all handsets, the handset name display for all handsets comes from the Line Label for Clearspan Line Position 1. When different numbers are used for the handsets, the handset name display comes from Line Label for Clearspan Line Position 1 for handset 1, Line Label for Clearspan Line Position 2 for handset 2, and so on.
Soft Keys		
Programmable Soft Keys	Park Retrieve Soft Key	"Park" is the only supported programmable soft key in "Talking" status and also appears when the call is parked on the handset and ready to be retrieved.
	Call Park in Function Menu	Enables Call Park in the function menu on the phone.
Soft Keys	Кеу	Displays the position of a specific soft key within the soft keys displayed on the phone.
		Configure any or all of the soft keys defined under the Key Definitions for the Panasonic phone. Only the keys available to the Panasonic phone are selectable in the Label drop-down. The following are valid soft key labels in idle status.
		Phonebook
	l - h - l	Menu Outgoing Call Log
	Label	Outgoing Call LogIncoming Call Log
		Redial
		• Page
		Soft Key 1(left) defaults to "Phonebook", Soft Key 2 (center) defaults to "Menu", Soft Key 3 (right) defaults to 'Outgoing Call Log". The defined soft keys are used for all hand sets configured on line.
Incoming Calls		
	Line	Displays the line number on the phone.
	Ring Handset 1-8	Sets the ringtone for each line on each handset. Ring tones range from Ring 1- Ring 32. If None is selected, the handset on that line does not ring or accept incoming calls on that line.
Outgoing Calls		
	Handset	Displays the number of the handset.
	Line 1-8	Select the boxes to configure which lines can be used to make calls. By default, all lines are checked.

Tab / Section	Field	Setting
	Default Outgoing Line	Specifies line used to make calls.
Extra Settings		
	Extra Settings	Enter extra settings that are to be applied to all Panasonic phones using this template. The extra settings for the Panasonic phone are in an XML format, as are all Panasonic phone settings.

Note: OpEasy analyzes the Template Extra Settings to determine if there are any parameters in the Extra Settings that are being overridden by the Template settings or are overriding the Template settings. If parameters that correspond to any of the Template settings are found in the Extra Settings, then Template Definitions: Extra Settings Audit Results page is displayed, indicating the extra settings parameters that conflict with the Template settings configuration.

Example Template

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Template Add
Create a new phone template.
OK Cancel Apply
Template Name: Panasonic1
Template Level: Enterprise
Enterprise: Bulk Provisioning Lab Val, Inc
Device Type: Panasonic KX-TGP800 (DMS)
Rebuild Status: Refresh Enterprise: None pending.
Restart Phones: NOTE: If Restart Phones is unchecked, the template will not take effect until a resync or when the phone is rebooted.
Restart Prones. WOTE: If Restart Prones is unchecked, the template will not take effect until a resync or when the priorie is repoded.
General Lines Soft Keys Incoming Calls Outgoing Calls Extra Settings
Name: Panasonic1
Description:
General Settings
Time Zone: (Use Global Settings) URI for Soft Keys: (Select EMS Address)
Use VLAN: Warning: Enabling VLAN may cause some phones to stop operating.
use viziki. 🔤 varinitiji. Enabiling viziki kina vause some prones to stop operating.
Outbound Proxy: 👿 Use Global Settings
Use DNS SRV Lookup
Port (No Encryption):
Port (Encryption):
Encryption (TLS/SRTP): (Use Global Settings) - WARNING: Configure encryption in the network before setting Encryption to Required.
Encryption Certificate File:
Panasonic Settings
Conference Server: (Use Global Settings)

Figure 201: Add General tab

ОКС	ancel Apply				
Template Nar	ne: Panasonic1				
Template Ler	vel: Enterprise				
Enterpri	se: Bulk Provisioning Lab Va	I, Inc			
Device Ty	pe: Panasonic KX-TGP800 (DI	MS)			
Rebuild Stat	us: Refresh Enterprise: No	one pending.			
eneral Lines	Soft Keys Incoming C	alls Outgoing Calls	Extra Settings		
		Useful tags for Line Label te		FirstName}, {LastName	e}
Seneral Lines			ext: {Ext}, {Number}, {	FirstName}, {LastName	a)
Phone Line		Useful tags for Line Label te	ext: {Ext}, {Number}, {	FirstName}, {LastName	e)
	Phone Line	Useful tags for Line Label te to Clearspan Line Position	ext: {Ext}, {Number}, {	FirstName}, {LastName	e)
Phone Line	Phone Line Clearspan Line Position	Useful tags for Line Label te to Clearspan Line Position Line Label	ext: {Ext}, {Number}, {	FirstName}. (LastName	e)
Phone Line 1 2 3	Phone Line Clearspan Line Position Position 1 +	Useful tags for Line Label te to Clearspan Line Position Line Label	ext: {Ext}, {Number}, {	FirstName), (LastName	e)
Phone Line 1 2 3 4	Phone Line Clearspan Line Position Position 1 • (Unassigned) • (Unassigned) •	Useful tags for Line Label te to Clearspan Line Position Line Label	ext: {Ext}, {Number}, {	FirstName), (LastName	e)
Phone Line 1 2 3 4 5	Phone Line Clearspan Line Position Position 1 • (Unassigned) • (Unassigned) • (Unassigned) •	Useful tags for Line Label te to Clearspan Line Position Line Label	ext: {Ext}, {Number}, {	FirstName), (LastName	e)
Phone Line 1 2 3 4 5 6	Phone Line Clearspan Line Position [Position 1] * (Unassigned) * (Unassigned) * (Unassigned) * (Unassigned) *	Useful tags for Line Label te to Clearspan Line Position Line Label	ext: {Ext}, {Number}, {	FirstName}, {LastName	e)
Phone Line 1 2 3 4 5	Phone Line Clearspan Line Position Position 1 • (Unassigned) • (Unassigned) • (Unassigned) •	Useful tags for Line Label te to Clearspan Line Position Line Label	ext: {Ext}, {Number}, {	FirstName}, {LastName	e)

Figure 202: Add Lines tab

Template Add Create a new phone template.	
OK Cancel Apply	
Template Name: Panasonic1 Template Level: Enterprise Enterprise: Bulk Provisioning Lab Val, Inc Device Type: Panasonic KX-TGP800 (DMS) Rebuild Status: Refresh Enterprise: None pending.	
Restart Phones: NOTE: If Restart Phones is unchecked, the templ	ate will not take effect until a resync or when the phone is rebooted.
General Lines Soft Keys Incoming Calls Outgoing Calls	Extra Settings
Programmable Soft Keys	
Call Park in Function Menu:	
	Talking Soft Keys
Кеу	Label
1	Original (System) 👻
2	Original (System) 👻
3	Original (System)
	- End of Keys -
	Idle Soft Keys
Key	Label
1	PhoneBook (System)
2	Menu (System)
3	Outgoing Call Log (System)

Figure 203: Add Soft Keys tab

Femplate Add	4						
reate a new phone temp							
OK Can	cel Apply						
Template Name	· Panasonic1						
Template Leve							
		Lab Mal Jac					
	e: Bulk Provisioning						
Device Type	Panasonic KX-TGP	9600 (DMS)					
Rebuild Status	s: Refresh Enterp	vrise: None pending.					
Restart Phones	s: 📃 NOTE: If Re	estart Phones is unche	cked, the template will r	ot take effect until a res	ync or when the phone	is rebooted.	
Restart Phones	_			not take effect until a res Settings	ync or when the phone	is rebooted.	
	_				ync or when the phone	is rebooted.	
	_		going Calls Extra		· ·	is rebooted.	
	_		going Calls Extra	Settings	· ·	is rebooted.	Ring Handset
General Lines	Soft Keys Inco	oming Calls Out	going Calls Extra Group Han	Settings dset / Handset select	for receiving call		Ring Handset
General Lines	Soft Keys Inco	Ring Handset 2	going Calls Extra Group Han Ring Handset 3	Settings dset / Handset select Ring Handset 4	for receiving call Ring Handset 5	Ring Handset 6	
General Lines	Soft Keys Inco Ring Handset 1 Ring 1	Ring Handset 2	going Calls Extra Group Han Ring Handset 3 Ring 3 +	Settings Idset / Handset select Ring Handset 4 Ring 4 +	for receiving call Ring Handset 5 Ring 5 +	Ring Handset 6	Ring 7 👻
General Lines	Soft Keys Inco Ring Handset 1 Ring 1 • Ring 1 •	Ring Handset 2 Ring 2 + Ring 2 +	going Calls Extra Group Han Ring Handset 3 Ring 3 + Ring 3 +	Settings dset / Handset select Ring Handset 4 Ring 4 - Ring 4 -	for receiving call Ring Handset 5 Ring 5 + Ring 5 +	Ring Handset 6 Ring 8 - Ring 8 -	Ring 7 +
General Lines	Soft Keys Inco Ring Handset 1 Ring T • Ring 1 • Ring 1 •	Ring Handset 2 Out Ring 2 • Ring 2 • Ring 2 •	going Calls Extra Group Han Ring Handset 3 Ring 3 + Ring 3 + Ring 3 +	deet / Handset select Ring Handset 4 Ring 4 + Ring 4 + Ring 4 +	for receiving call Ring Handset 5 Ring 5 + Ring 5 + Ring 5 +	Ring Handset 6 Ring 8 + Ring 8 + Ring 8 +	Ring 7 +

Figure 204: Add Incoming Calls tab

ок	Cancel	Apply							
Templat	e Name: Par	asonic1							
Templa	te Level: Ent	erprise							
Er	terprise: Bull	Provisioning -	- Lab Val, Inc						
Devi	ice Type: Par	asonic KX-TGF	9600 (DMS)						
Rebuik	d Status: Re	fresh Enter	prise: None per	nding.					
							- 19		
Restart	Phones:	NOTE: If Re	estart Phones 8	s unchecked, th	ie template will	not take effect	until a resync o	or when the ph	ione is rebooted.
neral I	ines Soft	Keys Inc.	oming Calls	Outgoing C	alle Extra	Settings			
neral L	ines Soft	Keys Inco	oming Calls	Outgoing C	alls Extra	Settings			
eneral L	ines Soft	Keys Inco							
eneral L	ines Soft	Keys Inco				Settings for making cal	1		
Handset	ines Soft	Keys Inco Line 2					Line 7	Line 8	Default Outgoing Line
			Hands	set and Line N	umber select t	for making cal	1	Line 8	Default Outgoing Line
Handset	Line 1	Line 2	Hands Line 3	set and Line N Line 4	umber select i Line 5	for making cal Line 6	Line 7		Line
Handset	Line 1	Line 2	Hands Line 3	set and Line N Line 4 I	umber select i Line 5 V V	for making cal Line 6 I	Line 7		Line Line 1
Handset 1 2	Line 1	Line 2	Hands Line 3	set and Line N Line 4 I	umber select t Line 5 I	for making cal Line 6 I	Line 7		Line 1 v Line 1 v
Handset 1 2 3	Line 1	Line 2	Hands Line 3	set and Line N Line 4 I	umber select i Line 5 V V	for making cal Line 6 I	Line 7		Line Line 1 v Line 1 v Line 1 v
Handset 1 2 3 4	Line 1	Line 2	Hands	set and Line N Line 4 C C C C C C C C C C C C C C C C C C C	umber select t Line 5 V V V	for making cal	Line 7		Line Line 1 v Line 1 v Line 1 v Line 1 v Line 1 v
Handset 1 2 3 4 5	Line 1	Line 2	Hands Line 3	set and Line N Line 4 C C C C C C C C C C	umber select t Line 5 V V V	for making cal	Line 7		Line Line Line Line Line Line Line Line

Figure 205: Add Outgoing Calls tab

Template Add Create a new phone template.
OK Cancel Apply
Template Name: Panasonic2
Template Level: Group
Enterprise: Bulk Provisioning – Lab Val, Inc
Group: Group_Pronto Pronto's Group
Device Type: Panasonic KX-TGP600 (DMS)
Rebuild Status: Refresh Group: None pending.
Restart Phones: 🔲 NOTE: If Restart Phones is unchecked, the template will not take effect until a resync or when the phone is rebooted.
General Lines Soft Keys Incoming Calls Outgoing Calls Extra Settings



Template Modify Change an existing phone template.				
OK Cancel App	ly .			
Template Name: TGP800_Ent Template Level: Enterprise Enterprise: Bulk Provisio Device Type: Panasonic K	ning Lab Val, Inc X-TGP600 (DMS)			
Rebuild Status: Refresh	Enterprise: None pending.			
Restart Phones: 🔲 NOTE	: If Restart Phones is unchecked, the temp	plate will not take effect un	il a resync or when	the phone is rebooted.
General Lines Soft Keys	Incoming Calls Outgoing Calls	Extra Settings Ter	nplate Users	
Name: TGP600_E	nterprise			
Description: This is an E	Enterprise Template for the XK-TGP800			
General Settings				
	Jse Global Settings) 👻	URI for Soft	Keys: tb20ems.cs	slab.mitel.com 👻
Use VLAN:	Warning: Enabling VLAN may cause son	ne phones to stop operatin	g.	
Outbound Proxy:	Use Global Settings			
	-			
	Use DNS SRV Lookup			
Po	rt (No Encryption):			
Po	rt (Encryption):			
Encryption (TLS/SRTP): (U	Jse Global Settings) 🔹 WARNING: Co	nfigure encryption in the n	etwork before setting	g Encryption to Required.
Encryption Certificate File:				
Panasonic Settings				
	Jse Global Settings) 💌			
Useful ta	ags for HandSet Name text: {Ext}, {Number	r}, {FirstName}, {LastName	}	
	HandSet Display Names			
Hand Set Hand Se	t Name			
1 Text	Ext}		_	
2 Extensi	ion 👻		_	
3 Extensi	ion 👻			
A Transm				

Figure 207: Modify General tab

emplate Mo ange an existing phon								
OK Car	ncel Apply							
Template Nam	e: TGP600_Enterprise							
Template Level: Enterprise								
Enterprise: Bulk Provisioning Lab Val, Inc								
Device Typ	e: Panasonic KX-TGP800 (D	MS)						
Rebuild Statu	s: Refresh Enterprise: No	one pending.						
Restart Phone	s: 📄 NOTE: If Restart Pl	hones is unchecked, the tem	nplate will not take eff	ect until a resync or when th	e phone is rebooted.			
General Lines	Soft Keys Incoming C	Calls Outgoing Calls	Extra Settings	Template Users				
		Useful tags for Line Label t	ext: {Ext}, {Number},	{FirstName}, {LastName}	_			
		to Clearspan Line Position	n Mapping					
Phone Line	Clearspan Line Position	Line Label			_			
1	Position 1 👻	Extension 👻			_			
2	Position 2 👻	Extension 👻						
3	Position 3 👻	Extension 👻						
4	Position 4 👻	Extension 👻						
5	Position 5 👻	Extension 👻						
	Desition 8	(Enterning)						

Figure 208: Modify Lines tab

Figure 209: Modify Soft Keys tab

OK Can	cel Apply								
Template Name	Template Name: TGP800_Enterprise								
Template Level	Template Level: Enterprise								
Enterprise	Bulk Provisioning	Lab Val, Inc							
Device Type	Panasonic KX-TGP	600 (DMS)							
Rebuild Status	Refresh Enterp	rise: None pending.							
Conoral Lines	Coff Kour	· · · ·	noine Calle Extra	Sottings Tomolate	lleare				
General Lines	Soft Keys Inco	oming Calls Outg	going Calls Extra	Settings Template	Users				
General Lines	Soft Keys Inco	oming Calls Outg							
			Group Har	ndset / Handset select	for receiving call				
General Lines	Ring Handset 1	Ring Handset 2	Group Har Ring Handset 3	ndset / Handset select : Ring Handset 4	for receiving call Ring Handset 5	Ring Handset 6	Ring Handset 7		
Line 1	Ring Handset 1	Ring Handset 2	Group Har Ring Handset 3 Ring 3	dset / Handset select Ring Handset 4 Ring 4	for receiving call Ring Handset 5 Ring 5	Ring 6 👻	Ring 7 👻	Ring 8 👻	
Line	Ring Handset 1	Ring Handset 2 Ring 2 * Ring 2 *	Group Har Ring Handset 3 Ring 3 • Ring 2 •	ndset / Handset select : Ring Handset 4	for receiving call Ring Handset 5 Ring 5 • Ring 5 •	Ring 6 -	Ring 7 -	Ring 8 - Ring 8 -	
Line 1	Ring Handset 1	Ring Handset 2	Group Han Ring Handset 3 Ring 3 • Ring 2 • Ring 2 •	dset / Handset select Ring Handset 4 Ring 4	for receiving call Ring Handset 5 Ring 5 + Ring 5 + Ring 5 + Ring 5 +	Ring 6 • Ring 6 • Ring 6 •	Ring 7 • Ring 7 • Ring 7 •	Ring 8 + Ring 8 + Ring 8 +	
Line 1 2	Ring Handset 1 Ring 1 • Ring 1 •	Ring Handset 2 Ring 2 * Ring 2 *	Group Har Ring Handset 3 Ring 3 • Ring 2 •	ndset / Handset select i Ring Handset 4 Ring 4 • Ring 4 •	for receiving call Ring Handset 5 Ring 5 • Ring 5 •	Ring 6 -	Ring 7 -	Ring 8 - Ring 8 -	
Line 1 2 3	Ring Handset 1 Ring 1 • Ring 1 • Ring 3 •	Ring Handset 2 Ring 2 + Ring 2 + Ring 10 +	Group Han Ring Handset 3 Ring 3 • Ring 2 • Ring 2 •	Adset / Handset select i Ring Handset 4 Ring 4 • Ring 4 • Ring 4 •	for receiving call Ring Handset 5 Ring 5 + Ring 5 + Ring 5 + Ring 5 +	Ring 6 • Ring 6 • Ring 6 •	Ring 7 • Ring 7 • Ring 7 •	Ring 8 + Ring 8 + Ring 8 +	
Line 1 2 3 4	Ring Handset 1 Ring 1 • Ring 1 • Ring 3 • (Ring 1 •	Ring Handset 2 Ring 2 • Ring 2 • Ring 10 • Ring 2 •	Group Han Ring Handset 3 Ring 3 • Ring 2 • Ring 3 • Ring 3 •	Ring 4 v Ring 4 v Ring 4 v Ring 4 v Ring 4 v Ring 4 v	for receiving call Ring Handset 5 Ring 5 + Ring 5 + Ring 5 + Ring 5 + Ring 5 +	Ring 6 •	Ring 7 •	Ring 8 + Ring 8 + Ring 8 +	
Line 1 2 3 4 5	Ring Handset 1 Ring 1 • Ring 1 • Ring 3 • Ring 1 • Ring 1 •	Ring Handset 2 Ring 2 • Ring 2 • Ring 10 • Ring 2 • (Ring 2 •	Group Har Ring Handset 3 Ring 3 * Ring 2 * Ring 3 * Ring 3 * Ring 3 *	dset / Handset select (Ring Handset 4 Ring 4 * Ring 4 * Ring 4 * Ring 4 * Ring 4 * Ring 4 *	for receiving call Ring Handset 5 Ring 5 • Ring 5 • Ring 5 • Ring 5 • Ring 5 • Ring 5 •	Ring 6 • Ring 6 •	Ring 7 • Ring 7 •	Ring 8 - Ring 8 - Ring 8 - Ring 8 - Ring 8 -	

Figure 210: Modif	y Incoming Calls tab
-------------------	----------------------

	Template Modify Change an existing phone template.									
_										
OK	OK Cancel Apply									
Templa	Template Name: TGP800_Enterprise									
Templ	Template Level: Enterprise									
E	nterprise: Bul	k Provisioning -	- Lab Val, Inc							
Dev	vice Type: Par	asonic KX-TG	P600 (DMS)							
Rebui	Id Status: Re	fresh Enter	prise: None per	nding.						
Restar	t Phones: 📃	NOTE: If R	estart Phones i	s unchecked, th	e template wil	I not take effect	t until a resync or	when the ph	one is rebooted.	
						• #:				
General	Lines Soft	Keys Inc	oming Calls	Outgoing C	alls Extr	a Settings	Template User	5		
			Hand	set and Line N	umber select	for making ca	ll –			
Handset	Line 1	Line 2	Line 3	Line 4	Line 5	Line 6	Line 7	Line 8	Default Outgoing Line	
1				1	1	1	1	1	Line 1 👻	
2				1	1	1	1	1	Line 1 👻	
3				~	V	V		1	Line 1 👻	
4	V	1	1	V	1	V		1	Line 1 👻	

Figure 211: Modify Outgoing Calls tab

Template Modify Change an existing phone template. OK Cancel Apply	
Template Name: TGP800_Enterprise Template Level: Enterprise Enterprise: Bulk Provisioning Lab Val, Inc Device Type: Panasonic KX-TGP800 (DMS) Rebuild Status: Refresh Enterprise: None pending.	
Restart Phones: NOTE: If Restart Phones is unchecked, the template will not take effect until a resync or when the phone is rebooted. General Lines Soft Keys Incoming Calls Outgoing Calls Extra Settings Template Users	
# CONNECTION_TYPE?r="0" # SYSLOG_ADDR?r="10.70.119.100"	



Template Modify Change an existing phone template.
OK Cancel Apply
Template Name: TGP600_Enterprise
Template Level: Enterprise
Enterprise: Bulk Provisioning Lab Val, Inc
Device Type: Panasonic KX-TGP600 (DMS)
Rebuild Status: Refresh Enterprise: None pending.
Restart Phones: 🔲 NOTE: If Restart Phones is unchecked, the template will not take effect until a resync or when the phone is rebooted.
General Lines Soft Keys Incoming Calls Outgoing Calls Extra Settings Template Users
Usage Displayed By:
Enter Search Criteria: Search
(All Template Assignments) + (Contains: +

Figure 213: Modify Template Users tab

Panasonic Phone Users

When creating a user or adding a phone to an existing user, any phone device created for that user may be a Panasonic phone.

User Device Settings for Panasonic Phones

For a Panasonic phone, the Device Access: User Name and Password fields appear and are *required* for definition of the phone. Valid password characters are a-z, A-Z, 0-9, blank, or special characters: -, ! % & * + / = ? ^ {} () ~ @.

Device credentials and MAC address fields are required and MUST be valid, matching the MAC address of the physical Panasonic phone assigned to that phone device. The Panasonic phone will not be able to load its configuration files if incorrect device credentials and/or an incorrect MAC address are entered.

Advanced: User Add Select a User Profile and complete the user information to add a new Clearspan user.
OK Cancel
Enterprise: EngLabTest Engineering Lab Testing Group: Phones User:
Service: (Select Service) •
User Optional Phones Announcements
User Classification
User Profile: (Select User Profile)
Clearspan User
* Last Name: * First Name:
E-mail Address:
Se Organization ID
Account ID: 222
User Billing Type: Default: (USER)
Department: (None) •
Phone Number: (Select Phone Number)
Extension:
Voice Mail: Voice Mail - No E-mail Notification
Note: Navigate VoiceMail Service to Enter Group Mail Server: E-mail Address hostname(Format must be 'user@hostname')
Voice Portal Passcode: (create a numeric passcode of 4 to 8 digits)
Confirm Portal Passcode:
* User Password: (create a password of at least 3 characters)
* Confirm User Password:
Initialize User Password to random password

Figure 214: Advanced User Add for Panasonic Phones (Top)

N	ew User Notification									
	New User Notification:	Send E-mail	Message to New User							
		Send E-mail	nd E-mail Message to OpEasy Administrator							
		Send E-mail	Message to Phone Procurement:							
		* E-mail Ad	idress:							
	11									
	User Information Site ID		(Dequir	ad to graate F	Extension-only users)					
			@ englab.aastra.co		Extension-only users)					
	* Clearspan User ID		e englab.adotra.co	un +						
	Support User	r: 📃								
	Calling Line ID						_			
	* Last Name	e:		* First	Name:					
	Phone Number	r. [
	Service Packs									
5	Select all Service Packs n	equired by the User	n							
	Available	Service Packs			User Service Packs					
ſ	ABC				^					
	Authentication		Add >							
	BusComm_and_IMP Desktop Lite		Remove <							
	Premium User									
	Premium User-old1		Add All >>		~					
	sp-all testbug		Remove All <<							
_	User Defined Fields									
		eld either choose to	o use the Default value or enter a value	e for this user	a					
		end, entrier entrose n	successful value of enter a value	e for and add						
-	Field Name				Туре	Use Default	Value			
l	Ssaa				String	v	1			
	Authentication									
	Name				a paceword of at least 3 charactere)					
	Paeswor	nt-		(create	a nassword of at least 3 characters)					
	Primary Phone Devic	ce								
	* Device 1	Name: Panason	icKX-TGP600DMS-9722221051							
	Device	Level: Group	•							
	* Line		051.primary	@ Tab	val.mitel.com					
		AN ID:	(VLAN is not enabled in the ter							
	vL/				top operating					
			Modifying the VLAN ID may cause th		top operauling.					
	MAC Ad		E1258 (Device's MAC Addres	s)						
	ERL Record N	Name:								
	Device A	ccess: * User Na	me: 9722221051							
		* Passwor	rd: 1051							

Figure 215: Advanced User Add for Panasonic Phones (Bottom)

User: Primary Pho	
Add a phone device as the primary OK* Cancel	phone for the user. *Pressing OK retains but does not save entered changes. To save the changes, press OK or Apply on the subsequent pag Manage Users Custom Tags Custom Rings
UK Cancer	Manage users Custom rags Custom Rings
	Bulk Provisioning Lab Val, Inc
	Group_G Group, Gewel Stacie, Grace
Phone Device	
Phone Device:	(New Phone Device) *
* Device Name:	PanasonicKX-TGP800DMS
* Device Level:	Group +
Device Type:	Panasonic KX-TGP600 (DMS) 🔹
Template:	TGP800 Enterprise (Enterprise)
	View Template
	view remplate
User Line	
*Line / Port:	9725551185.primary @ labval.mitel.com -
	1st Phone Line
Life rosition.	Fact Home Line
Device Developing	
Device Description	
Description:	
Serial Number:	
Phone Location:	

Figure 216: User Primary Phone Device Settings for Panasonic Phones

User General Settings for Panasonic Phones

As with Mitel phones, when creating a user with a Panasonic phone as the primary phone, an E-mail message can be sent to that user to notify of the new phone. Mitel phones and Panasonic phones have a different new user E-mail message because of the differences in setting up the phones.

To set up the new user E-mail notification message for a Panasonic phone from the Users page of Provisioning, click General Settings and New User E-mail Notification. Then, select the specific enterprise and Panasonic from the Phone Manufacturer drop-down list. Change the new user E-mail message as you would for a Mitel phone, with the text appropriate for a Panasonic phone.

Figure 217: User General Settings E-mail Notification for Panasonic Phones

Phone Management for Panasonic Phones

As with Mitel phones, Panasonic phones can also be added or modified under the Phone Management page of Provisioning.

Device Description	
Description:	
Serial Number:	
Phone Location:	Somewhere over the Rainbow
Device Configuration	
Host Name / IP Address:	Port
Outbound Proxy:	
Stun Server:	
MAC Address:	
Device Access:	User Name: 9722221055
Res	et Password:
Confir	m Password:
Device Protocol:	
Device Protocol:	SIP 2.0
Transport Protocol:	Unspecified 👻
VLAN ID:	(VLAN is not enabled in the template)
	WARNING: Modifying the VLAN ID may cause the phone to stop operating.
ERL Record Name:	Test 55
Encryption (TLS/SRTP):	None
Lines/Ports:	8

Figure 218: Phone Device Page for Panasonic Phones

Installing Panasonic Phones

For information about installing Panasonic phones, refer to the *Device Management Configuration Guide*.

Appendix C: OpEasy and Clearspan Setup for Cisco Phones

The following settings must be configured within OpEasy prior to installing Cisco phones at users' desks, as described in the following sections:

- Cisco Phone Support: Support for Cisco phones requires a 3rd Party system license to be installed.
- User Profiles: One or more User Profiles must be created for each type of Cisco phone so that the administrator can build Cisco phones for provisioning.
- Phone Templates

Key Definitions – In addition to the Cisco standard soft keys, some OpEasy-configured soft keys may be assigned to Cisco phones.

Global Settings - System, Enterprise, and Group level settings must be configured for Cisco phones.

Definitions - One or more templates must be created for each type of Cisco phone.

Notes:

E2

- For new settings added to Templates and Global Settings, the '(Unspecified)' selection option or text value is displayed. The '(Unspecified)' value indicates no value has ever been set, causing OpEasy to NOT generate configuration file fields for that new OpEasy setting. As such, any existing Global Extra Settings for that configuration file field continue to be used. However, once a setting has been changed to an actual value (replacing the '(Unspecified)' value), then OpEasy generates configuration file fields for that setting from then on. These actual values then override any Global Extra Settings for that field. After a value is selected to replace the '(Unspecified)' value, the '(Unspecified)' value, the '(Unspecified)' value is no longer an option.
- You can configure extra settings only if you have the full access privilege to view and edit extra settings.

User General Settings – The E-mail message sent to new Cisco phone users will be different from the message sent to Mitel phone users.

Users:- Users must be created with a supported Cisco phone.

Phone Management – Cisco phones can be added or modified under the Phone Management page of Provisioning.

Cisco Phone Support

Cisco Phone Support must be licensed within the appropriate Enterprises for the level of administrators that will be configuring Cisco phones if Enterprise Licensing is in use.

User Profiles for Cisco Phones

To allow administrators to quickly set up users with Cisco phones, one or more User Profiles should be created for each type of Cisco phone that will be used. When creating a User Profile, the administrator selects one of the supported Cisco phones as the Device Type. The selected type of Cisco phone will be created as the primary phone device for the new user.

Clearspan Setup for Cisco Phones

The following section contains tasks that must be performed on Clearspan before configuring the Cisco Phones:

Creating the System Device Management Tag Set

To create the Cisco Device Management Tag set:

Launch the Clearspan Provisioning Portal with System Administrator credentials.

Navigate to System > Resources > Device Management Tag Sets.

Click Add and enter Cisco Tags to create the tag set.

Click **Cisco Tags** to edit the tag set and click **Add** to include the tags in the following table:

Tag Name	Default Tag Value	Comments
%ASSIGNED_VLAN_ID%	4095	Default of 4095 indicates disabled
%DAYLIGHT_SAVING_TIME_ RULE%	start=3/8/7/2:0:0;end=11/1/7/2:0:0; save=1	Default rule is for North America
%FIRMWARE_PROTOCOL%	http	Can be "http" or "https" to be used for firmware download
%FIRMWARE_VERSION_68X X%	Sip68xx.11.1.2MPP-351.loads	For model 6851
%FIRMWARE_VERSION_78X X%	sip78xx.11.1.2MPP-351.loads	For models 7821, 7841, and 7861
%FIRMWARE_VERSION_88X X%	sip88xx.11.1.2MPP-351.loads	For models 8811, 8841, 8845, 8851, 8861 and 8865

Modifying Firmware Version for a Group

The firmware version can be changed for a specific group or device.

To modify the firmware version for a group:

- 1. Launch the Clearspan Provisioning Portal.
- 2. Navigate to the Group > Utilities > Device Configuration.

3. Click Edit on the appropriate Device Type in the list, for example Cisco 7841 (DMS).



Note: At least one of the devices must exist in the group.

- 4. Select the Custom Tags tab.
- 5. Click Add and enter the required version for the tag. For example, Tag Name: "%FIRMWARE_VERSION_78XX%".

Configuration 1-Minute Delay

When the phones download a modified configuration file, it will reboot and then wait for up to 1 minute before processing and applying any latest updates.

BLF Configuration

Cisco phones support using the BroadWorks BLF List URI. Using this method, the phone will automatically populate unused buttons, so you do not need to specify which button to use for the BLF keys manually or in OpEasy (they are assigned in the order received from BroadWorks). You can disable using Line Keys for phones that support expansion modules, so that all BLF entries will be populated on the Expansion Module Programmable Keys.

The phones also allow administrators to provision specific BLF users to monitor on a specific key, but in this case, you will specify the BLF List URI along with the UserId of the specific user to monitor each key.

Installation Instructions

Upon bootup, the phone will use the FQDN returned from the DHCP server and look for the model-specific configuration file (in dms/Clearspan).

The default Profile Rule is set to "/\$PSN.xml", which is appended to the FQDN and resolves to the model series name.

The initial model-specific configuration file, for example "7841-3PCC.xml" provides:

• A Profile Rule to download a configuration file created by OpEasy.



Note: This file is generated by OpEasy and contains the authentication username and password and the path for the MAC.xml file

• A softkey to the OpEasy Setup application to allow installation of the phone.

When the phone starts, it will display a **Setup** button, which is pressed to install the phone.

Installer Setup

The installer presses the Setup button on the phone, which:

Prompts the installer for the unique Device ID (unique ID entered into the MAC address field)

Finds the device with this ID and prompts the installer to verify the identity of this user (Y/N)

Saves the device's MAC address to the Clearspan device (overwrites the ID with correct MAC)

Sets a device tag (%MI_UPDATE_PWD%) to 1 to indicate the phone requires generation of an authentication password

Prompts the installer to reboot the device



Note: An **Exit** button appears on the phone, but do not exit the application, press the **Settings** button and restart the phone

Restart to Download Configuration

The Installer will restart the phone (it will take up to 2 minutes for the phone to activate):

 After 1 minute, the phone will download the configuration file from OpEasy which now contains the device credentials.

After 1 more minute, the phone will download the MAC.xml file using the provided credentials and apply the configuration.

Subsequent Restarts

During Subsequent restart, the phone restart always returns to the redirected path and has the required credentials to download MAC.xml updates.

Resetting a Password

To regenerate the password if a phone loses its password and cannot download the MAC.xml file:

- 1. From the Clearspan Web Portal, navigate to the appropriate device.
- 2. Click the Custom Tags tab.
- 3. Select the %MI_UPDATE_PWD% tag and click Edit.
- Change the Tag Value from 0 to 1 and press OK.
- **5.** Restart the phone (the phone will download the OpEasy configuration file containing the credentials).
- 6. Restart the phone again to use the credentials to download the MAC.xml file.

	tity/Device Profile Custom Tag Modify anagement tag for the Identity/Device Profile.
OK Delete	Cancel
Identity/Device Profile Name: Identity/Device Profile Type:	Cisco7861DMS-9723330025 Cisco 7861 (DMS)
	%MI_UPDATE_PWD%
Tag Value:	0
OK Delete	Cancel

Figure 219: Resetting a Password

Phone Templates for Cisco Phones

Key Definitions for Cisco Phones

The OpEasy soft keys are configured on the Key Definitions page for provisioning Phone Templates. Key Definitions are typically accessible by system administrators only, as they affect keys system wide.

When Cisco is selected as the Phone Manufacturer on the Key Definitions page, definitions specific to Cisco phones are displayed.

Key Definitio	ons												
Display and configure sy	stem and per enterprise keys.												
OK Ca	incel Apply	Add Copy System Keys											
Ente	erprise: Bulk Provisioning L	ab Val, Inc 👻											
Template	e Keys: Both System and Ent	terprise Keys 🔹 (Keys available to use in templat	es of th	e selecter	d enterprise)								
Phone Manufa	acturer: Cisco 👻												
Rebuild	Status: Refresh Enterpris	se: None pending.											
					Key Definition	s							
			1-25 o		-		B3 B-1	_	_	_	_		
_													
Туре	Label 🔿									Start	Start		
		Value 👌	Idle	Dialing	Connected	Ringing	Progressing	HOOK	Hold	Start Xfer		Releasing	
Input Star Code 🔹	*code		Idle	Dialing	Connected	Ringing	Progressing	Hook	Hold	Start Xfer	Start Conf	Releasing	
Right Arrow	*code ->		Idle	-								-	
								~					
Right Arrow 👻	~												
Right Arrow - Left Arrow -													
Right Arrow + Left Arrow + ACD Login +	-> <- Agt SignIn												
Right Arrow Left Arrow ACD Login ACD Logout	-> <- Agt SignIn Agt SignOut												
Right Arrow Left Arrow ACD Login ACD Logout AGent Status	-> <- Agt SignIn Agt SignOut Agt Status												

Figure 220: Key Definitions for Cisco Phones

To define a new key:

Select an Enterprise and a phone from the **Phone Manufacturer** drop-down box on the Key Definitions page and click **Add**. **Template Keys** drop-box sets the keys that will be displayed,

Field	Setting
Гуре	Select the type of key or feature that is being defined.
	ACD Login
	ACD Logout
	Agent Status
	Answer
	Available
	Barge In
	Barge Silent
	Blind Xfer
	• Call
	Call Forward
	Call Info
	Cancel
	Conference
	Conference Line
	Decline
	Delete Char
	Directory
	Disposition Code
	• DND
	 Extension Mobility Sign In
	 Extension Mobility sign Out
	Emergency
	End Call
	Favorites
	Function
	Group Pickup
	Hold
	Input Star Code
	• Join
	Last Call Rtn
	Left arrow icon
	• Line
	Messages
	• Miss
	New Call
	Option
	Park

Enter or Select the following in the Key Definition fields.

Delete

System, Enterprise, and Group Global Settings for Cisco Phones

To configure global Cisco phone settings, choose Phone Templates from the Provisioning menu, and then select Global Settings and select Cisco as the Phone Manufacturer. The common global settings for Cisco phones are shown on the General Settings tab and described in the following table.

OpEasy analyzes the Group, Enterprise, or System Extra Settings to determine if the parameters in the Extra Settings are being overridden by the General Settings, Dial Plan Settings or Custom Rings Settings. If parameters that correspond to any of the General Settings, Dial Plan Settings or Custom Rings Settings are found in the Global Extra Settings, then the **Global Configuration File Settings: Extra Settings Audit Results** page is displayed, indicating the extra settings parameters that conflict with the Global Settings configuration.

	Tation File Settings Clearspan settings for a selected Phone Manufact	urer. After being saved, the change occurs at the next resync or rel	boot of the affected phones.
OK Cancel	Apply		
Enterprise Group			
Phone Manufacturer	Cisco 💌		
General Settings Extr	a Settings System Config File Extension	Dial Plan	
	Group Settings	Enterprise Settings	System Settings
	Force Group Rebuild	Force Enterprise Rebuild	Force System Rebui
Refresh Rebuild S	itatus: No rebuilds pending in Group.	No rebuilds pending in Enterprise.	No rebuilds pending in System.
SIP Settings			
Outbound	Proxy: 👿 Use Enterprise Setting	Use System Setting	
		172.20.211.10	10.70.100.69
	Use DNS SRV Lookup	Use DNS SRV Lookup	Use DNS SRV Lookup
Proxy Port (No Encry	ption):	5082	5060
Proxy Port (Encry	ption):	5061	5081
Encryption (TLS/S	RTP): (Use Enterprise Setting) +	Not Allowed 👻	
Encryption Certificat	e File:		
Encryption WAR	NING: Configure encryption in the network first.		
Subscription	Time: 🚽 Use Enterprise Setting	Use System Setting	360
BLF Subscription	Time: 🗾 Use Enterprise Setting	Use System Setting	300
			380
Hoteling Subscription	Time: 🥃 Use Enterprise Setting	Use System Setting	

Figure 221: Global Settings for Cisco Phones

Field	Setting
SIP Settings	
Outbound Proxy	Enter the hostname or IP address of the outbound proxy server used by the Cisco phones.
Use DNS SRV Lookup	Select the Use DNS SRV Lookup option to use the Outbound Proxy Port (No Encryption) and Outbound Proxy Port (Encryption) of the DNS SRV.
Outbound Proxy Port (No Encryption)	Enter the port number for the outbound proxy server used by the Cisco phones when encryption is not used by Cisco phones.
Outbound Proxy Port (Encryption)	Enter the port number for the outbound proxy server used by the Cisco phones when encryption is used by Cisco phones.
Encryption (TLS/SRTP)	Select the setting for encryption. Required indicates encryption is required. Not Allowed indicates encryption is not allowed
Encryption Certificate File	Enter the encryption certificate filename.
Subscription Time	Enter the subscription time to be used in seconds or select Use Enterprise Settings.
BLF Subscription Time	Enter the BLF Subscription Time to be used in seconds. The default value at system level is 360 seconds.
Hoteling Subscription Time	Enter the Hoteling Subscription Time to be used in seconds. The default value at system level is 3600 seconds.

Field	Setting
Time Settings	
Time Server	Check box that indicates that the Time Server settings are to be set based on the values configured in Cisco Enterprise/System Global Settings.
Time Server 1	Enter the hostname or IP address to configure the FQDN used for the first-time server.
Time Server 2	Enter the hostname or IP address to configure the FQDN used for the second-time server.
Time Zone	Select the time zone that the phones are in.
Device Settings	
Network Discovery	Enable/disable the Cisco Discovery Protocol.
LAN Port Mode	Select the LAN speed, normally Auto. The other options include 10 Mbps Half-Duplex, 10 Mbps Full-Duplex, 100 Mbps Half-Duplex, 100 Mbps Full-Duplex, 1000 Mbps Full-Duplex.
Admin Password	Enter a password and Confirm Admin Password that is entered into the phone to access the advanced settings within the phone.
User Password	Enter a password and Confirm User Password that is entered into the phone to access the user settings within the phone.
Web Interface	Enable/Disable the web interface of the phone.
Direct Action URL	Enable/Disable access to the Direct Action URL.
Voice Codecs	
Voice Codec #1 to #3	Identify the voice codecs that the Cisco phone is to use when placing or receiving calls. The codecs are in priority order, with codec #1 as the highest priority codec to codec #3 as the lowest priority codec.
Quality Monitoring	
Quality Monitoring	Choose to ON/OFF quality monitoring.
Collector Server Address	Enter the hostname or IP address of the server to which quality monitoring messages are sent by the phone.
Collector Server Port	Enter the port to use on the collector server. The default port number is 5060.
General Settings	
Conference Server	Select the conference server to use for conference calls.
Firmware Server	Text field that contains the location of the firmware to be loaded.

System, Enterprise, and Group Extra Settings for Cisco Phones

To enter extra settings that are to be applied to all Cisco phones within the scope of the level, choose **Phone Templates** from the **Provisioning** menu, select **Global Settings**, the **Global Configuration File Settings** tab opens.

To edit extra settings for the group, select **Enterprise**, **Group** and **Phone Manufacturer**, click **Extra Settings**, the **Extra Settings** tab opens, click **Group Extra Settings**, and Click **OK** on the confirmation box (the confirmation box displays "Updating Extra Settings is potentially dangerous. Are you sure you want to update Extra Settings?"). Enter the extra settings in the **Group Extra** Settings box and Click OK, the Global Configuration File Settings: Rebuild Configuration Files page opens. Click Save and Rebuild to save the Template changes and rebuild all configuration files using this template.

Only Group Administrators and above can create or modify Group Extra Settings.

To edit extra settings for the enterprise, select **Enterprise**, **Group** and **Phone Manufacturer**, click **Extra Settings**, the **Extra Settings** tab opens, click **Enterprise Extra Settings**, and Click **OK** on the confirmation box (the confirmation box displays, "Updating Extra Settings is potentially dangerous. Are you sure you want to update Extra Settings?"). Enter the extra settings in the **Enterprise Extra Settings** box and Click **OK**, the **Global Configuration File Settings: Rebuild Configuration Files** page opens. Click **Save and Rebuild** to save the Template changes and rebuild all configuration files using this template.

Only Enterprise Administrators and above can create or modify Enterprise Extra Settings.

To edit extra settings for the system, select **Enterprise**, **Group** and **Phone Manufacturer**, click **Extra Settings**, the **Extra Settings** tab opens, click **System Extra Settings**, and Click **OK** on the confirmation box (the confirmation box displays, "Updating Extra Settings is potentially dangerous. Are you sure you want to update Extra Settings?"). Enter the extra settings in the **System Extra Settings** box and Click **OK**, the **Global Configuration File Settings: Rebuild Configuration Files** page opens. Click **Save and Rebuild** to save the Template changes and rebuild all configuration files using this template.

Only System Administrators and Super Users can create or modify the System Extra Settings.

ок с	Cancel Apply
En	terprise: Bulk Provisioning Lab Val, Inc 👻
	Group_G Group, Gewel +
Phone Manu	facturer: Cisco *
General Settings	Extra Settings System Config File Extension Dial Plan
Grou	p Extra Settings
<time_zone< td=""><td>e ua="na">GMT-08:00</td></time_zone<>	e ua="na">GMT-08:00
Choose F	ile Upload File
Enterp	rise Extra Settings
<time_zone< td=""><td>e ua="na">GMT-08:00</td></time_zone<>	e ua="na">GMT-08:00
	Ile Upload File
Choose F	
	m Extra Settings

Figure 222: Global Extra Settings for Cisco Phones

System, Enterprise, and Group System Configuration File Extension Settings for Cisco Phones

Choose **Phone Template** from the **Provisioning** menu, select **Global Settings** and select Cisco as the Phone Manufacturer, click the **System Config File Extension** tab to add the System Config File Extension settings. The additional settings must be in an XML format as are all Cisco configuration settings.

The settings on the **System Config File Extension** tab have lower-priority than ALL other Global Settings (including Global Extra Settings) and Template Settings.

Only Super Users and System Administrators can access the **System Config File Extension** Settings.

Global Config	Juration File Settings obal Clearspan settings for a selected Phone Manufacturer. After being saved, the change occurs at the next resync or reboot of the affected phones.
OK Can	
Enter; Gi	orise: Bulk Provisioning Lab Val, Inc + roup: Group_G Group, Gewel +
Phone Manufact	turer: Cisco 💌
General Settings	Extra Settings System Config File Extension Dial Plan
Choose File	Upload File

Figure 223: System Config File Extension Settings for Cisco Phones

System, Enterprise, and Group Dial Plans for Cisco Phones

Click the **Dial Plan** tab on the **Global Configuration File Settings** page to enter dial plan information for System, Enterprise, or Group levels or click **Use Enterprise Setting** to use enterprise settings, or click **Use System Setting** to use system settings. The **Long Digit Timeout** and **Short Digit Timeout** allows values in the range of 1 to 64 second(s). The dial plan information entered must be in Cisco format and can include any Cisco-specific setting.

Phone Templates: Definitions for Cisco Phones

As with Mitel phones, Cisco phones can only be created using a phone template. Create templates for Cisco phones as described in the following table. Refer to the Phone Templates section for more information on creating, editing, renaming, and deleting a phone template.

Template Add Create a new phone template.				
OK Cancel Apply				
Template Name: Closco1				
Template Level: Enterprise				
Enterprise: Bulk Provisioning Lab Val, Inc				
Device Type: Cisco 6851 (DMS)				
Rebuild Status: Refresh Enterprise: None pending.				
Restart Phones: 🔲 NOTE: If Restart Phones is unchecked, the template will not take effect until a resync or when the phone is rebooted.				
General Lines Programmable Keys Soft Keys Features Extra Settings				
Name: Cicsco1				
Description:				
General Settings				
Type of Expansion Module: None URI for Soft Keys: (Select EMS Address)				
Expansion Modules: Time Zone: (Use Global Settings) 🔹				
Use VLAN: 📋 WARNING: Enabling VLAN may cause some phones to stop operating.				
Outbound Proxy: 👿 Use Global Settings				
California Franz				
Use DNS SRV Lookup				
Port (No Encryption):				
Port (Encryption):				
Encryption (TLS/SRTP): (Use Global Settings) VARNING: Configure encryption in the network before setting Encryption to Required.				
Encryption Certificate File:				
Subscription Time: 👿 Use Global Settings				
seconds				
BLF Subscription Time: 📝 Use Global Settings				
seconds				
Hoteling Subscription Time: 🛛 Use Global Settings				
seconds				
Cisco Settings				
Conference Server: (Use Global Settings)				
Logo File URL:				
Picture File URL:				
Background Image: Default 💌				
Screen Saver: Clock				
Soreen Saver Wait Time: 300				
Line ID Mapping: Horizontal +				

Figure 224: Template Add - General for Cisco Phones

ate a new phone	Cancel Apply			
	Cancer Apply			
Template 1	Name: Cicsco1			
Template	emplate Level: Enterprise			
Ente	Enterprise: Bulk Provisioning Lab Val, Inc			
Device	Device Type: Cisco 8851 (DMS)			
Rebuild S	Rebuild Status: Refresh Enterprise: None pending.			
Restart Pr General Lin	_	rt Phones is unchecked, the temp	te will not take effect until a resync or when the phone is rebooted. Extra Settings	
	/ User: 1	Soft Keys Features	· ·	
General Lin BLF Line	/ User: 1	Soft Keys Features	Extra Settings	
General Lin BLF Line	/ User: 1	Soft Keys Features	Extra Settings {Number], {FirstName}, {LastName}	
General Lin BLF Line Max Calls Pe	/ User: 1 er Line: 2 v Us	Soft Keys Features	Extra Settings {Number}, {FirstName}, {LastName} one Line to Clearspan Line Position Mapping	MW
General Lin BLF Line Max Calls Pe	/ User: 1 er Line: 2 + Us Clearspan Line Position	Soft Keys Features seful tags for Line Label text: {Ext Pi Programmable Key	Extra Settings (Number), (FirstName), (LastName) one Line to Clearspan Line Position Mapping Line Label Ring	• W
General Lin BLF Line Max Calls Pe Phone Line 1	/ User: 1 er Line: 2 + Us Clearspan Line Position ((Unassigned) +	Soft Keys Features seful tags for Line Label text: {Ext Pl Programmable Key (Unassigned)	Extra Settings (Number), (FirstName), (LastName) one Line to Clearspan Line Position Mapping Line Label Extension Control Cont	-

Figure 225: Template Add – Lines for Cisco Phones

Tab / Section	Field	Setting
General	Name	Template name.
	Description	Description of the template.
	Type of Expansion Module	Select the supported key expansion module for the selected device type. If the device type does not support the key expansion modules this drop-down box will be disabled.
		This option is displayed for the Cisco 6851, 8851, 8861, and 8865 phone models.
	Expansion Modules	Select the number of expansion modules to be configured for the device type. The list contains the number of expansion modules supported by the selected device type.
	URI for Soft Keys	Select the URI for Soft Keys from the drop-down list. You cannot save the configuration unless you choose the URI. This entry is used to point to the appropriate EMS server for key definitions using OpEasy phone applications.
	Time Zone	Select the Time Zone from the drop-down list. Use Global Settings uses the time zone from Global Settings in Phone Templates. User Time Zone uses the time zone of the first primary user assigned to the phone. Use DHCP uses the time zone from the DHCP server. You can also select a specific time zone.
	Outbound Proxy	Enter the proxy information for this phone.
	Use DNS SRV Lookup	Select the Use DNS SRV Lookup option to use the Outbound Proxy Port (No Encryption) and Outbound Proxy Port (Encryption) of the DNS SRV.

Tab / Section	Field	Setting
	Outbound Proxy Port (No Encryption)	Enter the port number for the outbound proxy server used by the Cisco phones when encryption is not used by Cisco phones.
	Outbound Proxy Port (Encryption)	Enter the port number for the outbound proxy server used by the Cisco phones when encryption is used by Cisco phones.
	Encryption (TLS/SRTP)	Select the setting for encryption.
	Encryption Certificate File	Enter the encryption certificate filename.
	Subscription Time	Use Global Settings for subscription time or clear the Use Global Settings check box and enter the subscription time in seconds.
	BLF Subscription Time	Use Global Settings for subscription time or clear the Use Global Settings check box and enter the BLF subscription time in seconds.
	Hoteling Subscription Time	Use Global Settings for subscription time or clear the Use Global Settings check box and enter the Hoteling subscription time in seconds.
	Conference Server	Select the conference server as configured on the Conference Server Addresses page from the drop-down box.
	Logo File URL	Enter the URL of the image to be used as the logo. The image size must be 64x64 pixels and the image should be in Portable Network Graphics (PNG) format or JPEG format.
	Picture File URL	Enter the URL of the picture to be used as the screer saver. The image size must be 128x128 pixels the image should be in PNG format or JPEG format.
	Background Image	Select the phone background image.
		The 8800 series phones support the use of a picture file as a background image.
		 Select Picture to use the picture referenced by the Picture File URL setting as the background image of the phone.
		 Select Logo to use the picture referenced by the Logo File URL setting as the background image o the phone.
	Screen Saver	Select the phone screen saver.
	Screen Saver Wait Time	Enter the number of seconds before the screen save is activated. The screen saver wait time should be 30 seconds or greater.
	Line ID Mapping:	 Select one of the following options for shared call appearance line ID mapping: Horizontal First – (default) a second call will make the same LED flash on which the first call was received.
		 Vertical First – a second call will make the next available line ID LED flash

Tab / Section	Field	Setting
Lines	Phone Line	Each phone line can be assigned only to a single user.
	BLF Line/User	Change the BLF Line/User if necessary. This value applies when the Busy Lamp Field (BLF) feature is assigned. The default of 1 is generally the preferred setting. The value is used to identify which line will be associated with the BLF list URI.
		Note: The Direct Voice Mail feature with BLF Key is not available for on the Cisco 6851 phones, dial *55 followed by the extension, and press # to connect to the Voice Mail.
	Allow Use of Programmable Keys for BLF List	Select to allow BLF lines to appear on the Programmable Keys of a Cisco phone. This setting is displayed only when an Expansion Module is selected on the General tab of the template. If an Expansion Module is not selected the BLF lines are allowed on Programmable Keys by default.
	Max Calls Per Line	Select the maximum number of calls allowed for each phone line. The allowed values are in the range of 2 to 10.
	Clearspan Line Position	Select the Clearspan Line Position that you want to assign. This is the Clearspan line to use for the Phone Line. A single Clearspan Line Position can appear on one or more Phone Lines, which are on separate buttons on the phone.
	Line Label	Select the possible labels for the line. The valid values are:
		 Extension - (default) the extension is displayed as the line label
		 Phone Number - the phone number is displayed as the line label
		 Text - administrator specified text is displayed as the line label. When this value is selected, a text field appears, where the administrator enters the text to be used as the line label. The following substitution tags can be used in the text:
		 {Ext} - the extension of the line is substituted.
		 {Number} - the phone number of the line is substituted.
		 {FirstName} - the first name of the user assigned to the line is substituted.
		 {LastName} - the last name of the user assigned to the line is substituted.
	Ring	Select the ring to use for the specified Clearspan Line Position. There are 13 ring tones including the default tone.
	SCA MWI	Enable or Disable the message waiting indicator for SCA lines.

Tab / Section	Field	Setting
Programmable Keys	Кеу	Static text indicating the programmable line key number
	Label	Select the valid feature keys as defined in the Template Key Definitions for Cisco. The valid key types are:
		 Line Any key that is a 'Function' type defined on the Global Key Definitions page.
	Phone Line	When the key is defined as a Line, the associated line number is displayed as static text. If the key is not defined as a line, then a drop-down list that contains the valid lines keys is displayed. A line key may be required depending on the type of key selected in the label column.
Soft Keys	Soft Key Position	Select the position of a specific soft key within the sof keys displayed on the phone.
	Label	Configure any or all the soft keys defined under the Key Definitions for Cisco phones. Only the keys available to Cisco phones are selectable in the Labe drop-down list.
	Phone Line	When the key is defined as a Line, the associated line number is displayed as static text. If the key is not defined as a line, then a dropdown list that contains the valid lines keys is displayed. A line key may be required depending on the type of key selected in the label column.
Features	ACD Agent	Enable or Disable the ACD Agent feature.
		 ACD Line - drop-down list used to assign the phone line to be used as the ACD line. The valid values are a list of lines that are available based on the settings in the Lines tab.
		 Call Information - check box used to enable the Call Information feature.
		 Queue Status - check box used to enable the Queue Status feature.
		 Disposition Code - check box used to enable the Disposition Code feature.
		 Trace - check box used to enable the Trace feature.
		 Emergency Escalation - check box used to enable the Emergency Escalation feature.
	Clearspan Call Logs	Enable/ Disable the Clearspan Call Logs.
	Clearspan Directory	Enable/ Disable the Clearspan Directory
		Type - a drop-down list to select the directory type. The valid options are:
		Enterprise
		Group
		Personal

Tab / Section	Field	Setting
	LDAP Directory	Enable/ Disable the LDAP Directory
	Hoteling	Select the phone line to be used as the Hoteling line. The valid values are list of lines that are available based on the settings in the Lines tab.
Extra Settings		Enter extra settings that are to be applied to all Cisco phones using this template. The extra settings for the Cisco phones are in an XML format, as are all Cisco phone settings.
Template Users		The Template Users tab contains the standard components that helps find the devices that are using the template.

Expansion Keys Tab

The **Expansion Keys Tab** is available only when the number of Expansion Modules are selected on the **General** tab. Only the Cisco 6851, 8851, 8861, and 8865 phone model supports the Expansion Module. The Cisco 7811, 7821, Cisco 7841, and Cisco 7861 phone models do not support Expansion Modules.

The following table lists the Cisco Phone Models and the maximum number of expansion modules supported by the phone:

Phone Model	Maximum Number of Expansion Modules Supported
Cisco 6851	1
Cisco 8851	2
Cisco 8861	3
Cisco 8865	3

The **Expansion Keys** Tab contains the **Expansion Keys** table to configure the keys for an expansion module assigned to the phone.

The **Expansion Keys** table contains the following columns:

- · Key static text displaying the expansion key number
- Label drop-down list that contains the valid feature keys as defined in the Template Key Definitions for Cisco.
- Phone Line drop-down list that contains the valid lines keys. A line selection may be required depending on the type of key selected in the label column.

General	Lines	Programmable Keys	Soft Keys	Exp 1 Keys	Exp 2 Keys	Features	Extra Settings
					Exp	ansion Keys	
Ke	ey	Label					Phone Line
1	1	(Select Key) 👻					
2	2	(Select Key) 🗸					
3	3	(Select Key) 👻					
4	1	(Select Key) 👻					
5	5	(Select Key) 👻					
6	6	(Select Key) 👻					
7	7	(Select Key) 👻					
8	3	(Select Key) 👻					
9)	(Select Key) 🗸					

Figure 226: Template Add – Expansion Keys for Cisco Phones

Note: OpEasy analyzes the Template Extra Settings to determine if there are any parameters in the Extra Settings that are being overridden by the Template settings or are overriding the Template settings. If parameters that correspond to any of the Template settings are found in the Extra Settings, then **Template Definitions: Extra Settings Audit Results** page is displayed, indicating the extra settings parameters that conflict with the Template settings configuration.

Cisco Phone Users

E7

When creating a user or adding a phone to an existing user, any phone device created for that user may be a Cisco phone. An OpEasy 3rd Party License is required for each added or modified Cisco phone. An error message appears if no license is available.

User Device Settings for Cisco Phones

For any of the supported Cisco phones, the Device Access: User Name and Password fields appear and are *required* for definition of the phone. Valid password characters are a-z, A-Z, 0-9, blank, or special characters: $- _ . . !$ % & * + / = ? ^ { } { } ~ @.

Device credentials and MAC address fields are required and MUST be valid, matching the MAC address of the physical Cisco phone assigned to that phone device. The Cisco phone will not be able to load its configuration files if incorrect device credentials and/or an incorrect MAC address are entered.

User General Settings for Cisco Phones

When creating a user with a Cisco phone as the primary phone, an E-mail message can be sent to that user to notify of the new phone. Mitel phones and Cisco phones have a different new user E-mail message because of the differences in setting up the phones.

To set up the new user E-mail notification message for a Cisco phone from the Users page of Provisioning, click General Settings and New User E-mail Notification. Then, select the specific enterprise and Cisco from the Phone Manufacturer drop-down list. Change the new user E-mail message as you would for a Mitel phone, with the text appropriate for a Cisco phone.

Phone Management for Cisco Phones

Cisco phones can be added or modified under the Phone Management page of Provisioning.

OK Cancel	Apply Manage Users Custom Tags Custom Rings Replace Phone
	Bulk Provisioning Lab Val, Inc
Group:	Group_G Group, Gewel
Phone Device	
Device Name:	Cisco7841DMS- <u>9722221043</u>
Device Level:	Group
Device Type:	Cisco 7841 (DMS)
Support Device:	No
Template:	Cisco 7841_Grp (Group)
Tomplato.	View Template
	view rempiate
	Restart Phones on Save
	Kestart Phones on Save
Description:	
Serial Number:	
Description:	
Description: Serial Number: Phone Location:	
Description: Serial Number: Phone Location: evice Configuration	Somewhere over the Rainbow
Description: Serial Number: Phone Location: evice Configuration Host Name / IP Address:	Somewhere over the Rainbow
Description: Serial Number: Phone Location: evice Configuration Host Name / IP Address: Outbound Proxy:	Somewhere over the Rainbow Port:
Description: Serial Number: Phone Location: evice Configuration Host Name / IP Address:	Somewhere over the Rainbow
Description: Serial Number: Phone Location: Host Name / IP Address: Outbound Proxy: Stun Server:	Somewhere over the Rainbow
Description: Serial Number: Phone Location: Host Name / IP Address: Outbound Proxy: Stun Server:	Somewhere over the Rainbow Port: 000000021043
Description: Serial Number: Phone Location: Host Name / IP Address: Outbound Proxy: Stun Server: MAC Address:	Somewhere over the Rainbow Port: 000000021043 SIP 2.0
Description: Serial Number: Phone Location: Host Name / IP Address: Outbound Proxy: Stun Server: MAC Address: Device Protocol:	Somewhere over the Rainbow Port: 000000021043 SIP 2.0
Description: Serial Number: Phone Location: Host Name / IP Address: Outbound Proxy: Stun Server: MAC Address: Device Protocol: Transport Protocol:	SiP 2.0 Unspecified (VLAN is not enabled in the template) WARNING: Modifying the VLAN ID may cause the phone to stop operating.
Description: Serial Number: Phone Location: Host Name / IP Address: Outbound Proxy: Stun Server: MAC Address: Device Protocol: Transport Protocol:	SIP 2.0 Unspecified v (VLAN is not enabled in the template)
Description: Serial Number: Phone Location: Host Name / IP Address: Outbound Proxy: Stun Server: MAC Address: Device Protocol: Transport Protocol: VLAN ID:	Somewhere over the Rainbow Somewhere over the Rainbow Port: 00000021043 SIP 2.0 Unspecified (VLAN is not enabled in the template) WARNING: Modifying the VLAN ID may cause the phone to stop operating. Test_43

Figure 227: Phone Device Modify for Cisco Phones

Installing Cisco Phones

For information about installing Cisco phones, refer to the Device Management Configuration Guide.

Appendix D: Mitel Key Definitions

Phone applications can easily be assigned to phone buttons using the OpEasy Phone Templates function and selecting the appropriate key Label for each soft key. Some of the applications already have default entries in the Key Definitions list (you will have to check your system to see which ones exist), but new ones can be added as needed. These can be managed in OpEasy by navigating to Provisioning | Phone Templates | Key Definitions, as shown in the following figure.

1 - A	
- 6	
ΞA	

Note: Only SR administrators and above are allowed to create or modify Key Definitions.

	em and per enterprise keys.					
OK Cano	el Apply	Add Copy System Keys				
Enterp	rise: Bulk Provisioning I	ab Val, Inc 👻				
Template K	eys: Enterprise Keys Only	(Keys available to u	se in templates of the selected enter	erprise)		
Phone Manufact	urer: Mitel (Aastra) 💌					
Rebuild Sta	atus: Refresh Enterpri	se: None pending.				
			Key Definitions			
		(1-25 of	29) 🔢 📢 🕇 2 📦	F1		
Гуре	Label 🔿	Value 👌	Idle	Connect	Incoming	Outgoing
Auto Call Distribution	ACD - Ent					
None	ACD_Avail	http://%CS_SOFT_KEY_URI%/	acd.php?function			
Auto Call Distribution	ACD_SignIn	http://%CS_SOFT_KEY_URI%/	acd.php?function			
BLF/List	ACD_SignOut	http://%CS_SOFT_KEY_URI%/	acd.php?function			
BLF/Xfer	ACD_Unavail	http://%CS_SOFT_KEY_URI%/	acd.php?function			
Call Forward Callers	BLF List					
Conference	Call Fwd	(
Directed Call Pickup Directory	Call Pull	1 [*11		V	~	~
Do Not Disturb	Call Rtn	%BWFAC-CALL-RETURN-1%		V	~	V
Empty Flash	Callers					
Line	CallLog	http://%CS_SOFT_KEY_URI%/	callog.php?spee	~	~	~
Mobile	Call Mark	http://%CS_SOFT_KEY_URI%/	callmark.php?US	V	~	1
Park Phone Lock	Conf			Image: A state of the state	~	~
Pickup	Dir CallPick	%BWFAC-DIRECTED-CALL-PI				
Services Speeddial	Directory		Image: A start of the start	~	1	~

Figure 228: Key Definitions

All phone applications are entered with a key type of "XML" (since the applications are XML-based). The URL assigned to each key should use the built-in tag %CS_SOFT_KEY_URI%. This tag is replaced with the URI that is configured in OpEasy (in Provisioning | Phone Templates per the URI for Soft Keys field on the General tab).



Note: Only SR administrators and above are allowed to add or modify URI addresses for use in this tag.

The key definitions may be set up to use http or https (SSL) if the system has been installed using SSL.

ACD (Auto Call Distribution)

The ACD (Auto Call Distribution) phone application provides Clearspan® Call Center agents with buttons to perform the following functions:

- Sign In
- Sign Out
- Available
- Unavailable
- Wrap

This application provides these functions as separate buttons, and also has an option to play an audio prompt indicating the agent's new state, both to meet ADA requirements.

Key definitions for the ACD functions must be formatted as follows:

```
http://%CS_SOFT_KEY_URI%/acd.php?function=<type>&playaudio=1&featureuri=%CS_S
OFT_KEY_URI%
```

Where:

- The function parameter <type> must be one of the following: "signin", "signout", "available", "unavailable", or "wrap"
- The playaudio parameter may be 1 or 0, and if omitted it defaults to 0 (disabled)
- The featureuri parameter is the URI for the location to play the audio files (usually the same as the main URI).

ACD Audio Prompts

The following prompts are installed to be played on the phone if the "playaudio" parameter is enabled:

SignIn.wav	"ACD agent is signed in"
SignOut.wav	"ACD agent is signed out"
Available.wav	"ACD agent is available"
Unavailable.wav	"ACD agent is not available"
Wrap.wav	"ACD agent is in wrap"
Error.wav	"Unable to process request, if the problem persists contact your administrator"

User Guide

When each button is pressed, the associated function is executed and, if enabled, the audio is played indicating the agent's state. For ADA compliance there are no menus to navigate to perform these functions.

Call Mark

The Call Mark application provides a convenient mechanism to log user issues so the Clearspan technical support team can troubleshoot the cause.

The support organization normally determines when this button should be used (generally for issues that may be intermittent and information needs to be collected). In those cases, a button may be added to a user phone using the following key definition:

http://%CS_SOFT_KEY_URI%/callmark.php

This function logs the event in the phone_app_log table of the OpEasy database, logs the event in the CSInterface log and also sends an SNMP trap to notify support that the event has occurred. Log information includes the time that it occurred, the MAC address of the phone, the phone's device name and the currently active or last active line/port.

User Guide

The support team communicates to users when they should press this button. Typically, when the issue occurs, the user simply presses the button, allowing the support team to receive notification of the problem.

CLID Block

You can add the CLID Block key to support Calling Line ID Delivery Blocking per Call. Hides the user's calling line ID for the next call. A CLID Block softkey can be added with the following definition:

%BWFAC-CLID-DELIVERY-BLOCKINGPER-CALL-1%

User Guide

Before placing a call, the user presses the CLID Block key; and then places the call as usual.

Directory Lookup

The directory application provides functions to search from an LDAP directory and then display the list on the user's phone for dialing.

LDAP Lookup: Servers are provisioned in OpEasy (for an enterprise or for groups), allowing the phone to display the appropriate directory for each user.

Important: One of the available functions within directory lookup is the ability to add a number to the user's Speed Dial list. If this feature must be available, then the application must know which Speed Dial type the user has provisioned, which is done by adding the parameter "speedtype" with one of the following values:

- Speedtype=0 Indicates directory uses Speed Dial 8
- Speedtype=1 Indicates directory uses Speed Dial 100

If this function is not required, this parameter may be omitted, otherwise you will likely need 2 separate soft key definitions to support users with each type of speed dial.

For example, the following key definition provides LDAP lookup using Speed Dial 100:

http://%CS_SOFT_KEY_URI%/ad.php?speedtype=1

LDAP Servers and Credentials

LDAP servers and credentials can be set up for an entire enterprise or a separate one for each group as needed. This is provisioned with OpEasy via Provisioning | Group Settings | Phone Directory Management.

When the directory application is launched (via ad.php), it first identifies which group the device is associated with and connects to the provisioned LDAP server to fulfill the requests.

Secure vs. Non-Secure Access

Note that the URI field for the directory uses the format of Idap://</dap server name>

The option to use TLS 1.2, which provides added security when accessing an active directory, is available. To allow this, the URI field must use the format of ldaps://

To convert from non-secure to secure LDAP access, edit the Phone Directory entry and update the Server URI field to insert the 's' as shown in the following figure.

Phone Directory Modify the selected Directory set		
OK Cancel	Apply	
Enterprise: Group:		
Server Information		
Server Enabled:	Senabled	
* Server URI:	Idap://Cslabdc01.cslab.mitel.com	
* Server Root DN:	DC=cslab,DC=mitel,DC=com	
* Server User ID: * Reset Password]
* Confirm Password:		5
Query		
Query:	Remove Extensions from Results Disable Workphone Search	
Field Mapping		
Last Name Field:	Sn ID Field: distinguishedName	
First Name Field:	givenName Sort Field: displayName	
Work Phone Field:	telephoneNumber Append Field:	
Home Phone Field:	homePhone Additional Search Field:	
	France and the second s	

Figure 229: Phone Directory Modify

If a secure LDAP connection cannot be established because the server cannot validate the client's certificate, contact your system administrator.

Directory Search

When the directory application is launched, the user is prompted with "Enter Name" to perform a search. The following functions are available from this screen:

Directory Search

BackSpace:	Back space entered characters to correct the entry
Space:	Add a space character to the entry
abc:	Change from alpha to digits, etc
Lookup:	Perform a lookup search with the entered name
Cancel:	Exit the application

Directory Search->Lookup

Pressing "Lookup" retrieves the list of possible names from what was entered. The user may then move up or down in the list to select one of the entries. The following functions are available on the search results screen:

Dial:	Dial the selected name from the list (using the default phone)
Display:	Display additional phone numbers for the selected name
Back:	Return to the previous page
Cancel:	Exit the application
Page Up:	Go to the previous page in the list (if more than one page)
Page Down:	Go to the next page in the list (if more than one page)

Directory Search->Lookup->Dial

Pressing "Dial", dials the selected entry from the list using the first number in the list (default number).

Directory Search->Lookup->Display

Pressing "Display", performs an added-search for this entry to find and display any additional phone numbers available for the selected name. The following functions are available on this results screen:

Dial:	Dial the selected name from the list
Edit:	Edit the number if it cannot be dialed as shown (add prefix, etc.)
Speed Dial:	Add this number to Speed Dial
Back:	Return to the previous page
Cancel:	Exit the application

Directory Search->Lookup->Display->Dial

Pressing "Dial", dials the selected number from the list.

Call Logs

The Call Logs (recent call list) application displays the most recent received, placed, and missed calls for the user to view and dial. The application also provides functions to add a phone number to the user's speed dial list.

The Call Logs application displays missed calls immediately when the feature button is invoked. From the 'Missed' calls screen, buttons are available for 'Dialed' and 'Received' calls.

The call information displayed is retrieved from the Clearspan system itself (not the local phone information). Buttons are available to navigate the list and to 'Dial' or 'Display' the selected entry.



Note: This application attempts to format phone numbers such that they can be dialed as required by the system (adding or removing outside line digit, etc.). See section *Phone Number Formatting* for more information about this function.

Important: The function to add a number to the user's Speed Dial list requires the application to know which Speed Dial type the user has provisioned. This is done by adding the parameter "speed-type" with one of the following values:

- Speedtype=0 Indicates directory uses Speed Dial 8
- Speedtype=1 Indicates directory uses Speed Dial 100

Your System Administrator might provide two separate soft key definitions to support users with each type of speed dial.

For example, the following key definition provides Call Logs using Speed Dial 100:

http://%CS_SOFT_KEY_URI%/calllog.php?speedtype=1

User Guide

When the Call Logs application is launched, the user is presented the "Missed" calls display. The phone numbers listed are in chronological order with the most recent missed call at the top.

The following functions are available on this screen:

Select Missed

Dial:	Dial the selected name from the list
Page Up:	Go to the previous page in the list (if more than one page)
Page Down:	Go to the next page in the list (if more than one page)
Display:	Display details including the phone number and the date/time
Dialed:	View the calls that were dialed
Received:	View the calls that were received

Select Missed->Navigate to Number

The list of phone numbers is displayed as a menu. The user presses the up and down navigation buttons to select an entry. If multiple pages exist, the Page Up or Page Down buttons are visible (also, the page number and total pages are displayed e.g. 1/5). Once at the selected entry, press either Dial or Display.

Select Missed->Navigate to Number->Dial

Pressing "Dial" dials the phone number for the selected entry.

Select Missed->Navigate to Number->Display

Pressing "Display", shows details including the name, phone number and the date/time for the entry. The following functions are available on this screen:

Dial:	Dial the selected name from the list
Add Speed:	Add this number to Speed Dial
Back:	Return to the previous page

Select Missed->Navigate to Number->Display ->Add Speed

Pressing "Add Speed" adds the number to the user's speed dial list (it is added to the next available empty speed dial code in the list). The screen displays "Speed Dial Entry Added" to confirm the number was added. The following function is available on this screen:

Done: Return to the previous main page (i.e. Missed, Dialed or Received)
--

Rather than dialing or displayed missed calls, from the "Missed" calls screen, the phone user may also view dialed or received calls.

Select Missed-> Received->Dialed

Or

Select Missed->Dialed

The user is presented the "Dialed" calls display. The phone numbers listed are in chronological order with the most recent dialed call at the top. Navigation to an entry on the list is allowed just as described from the "Missed" calls display.

The following functions are available on this screen:

Dial:	Dial the selected name from the list
Page Up:	Go to the previous page in the list (if more than one page)
Page Down:	Go to the next page in the list (if more than one page)
Display:	Display details including the phone number and the date/time
Missed:	View the calls that were missed
Received:	View the calls that were received

From either the "Missed" display or the "Dialed" display, the received calls can be displayed.

Select Missed->Dialed->Received

Or

Select Missed->Received

The user is presented the "Received" calls display. The phone numbers listed are in chronological order with the most recent received call at the top. Navigation to an entry on the list is allowed just as described from the "Missed" calls display.

The following functions are available on this screen:

Dial:	Dial the selected name from the list
Page Up:	Go to the previous page in the list (if more than one page)
Page Down:	Go to the next page in the list (if more than one page)
Display:	Display details including the phone number and the date/time
Dialed:	View the calls that were dialed
Missed:	View the calls that were missed

Mobile

The softkey on the desk phone for the user to answer the mobile calls on the desk phone and move the calls back and forth between the mobile and the desk phone.

The new System Key Definition (with Key Type 'mobile') is available in the Top Soft Keys or Expansion Unit keys.

This functionality is available for Mitel 6930 and Mitel 6940 phones.

RSS Feeds

The RSS Feed application provides several channels of information to the user's phone display.

This function may be added to a user phone using the following the following key definition:

http://%CS_SOFT_KEY_URI%/rss.php

The URIs for the various RSS feeds are maintained in ".rss" files in /var/www/html/rss. There is a definition file for each category provided for the user.

User Guide

Pressing the RSS button provides a menu with 5 main categories:

- CNN (News)
- Weather
- ESPN (Sports)
- Movies
- Today (Today in history, quote of the day, and so on.)

RSS

Select:	View the selected channel
Move Up:	Move up in the list
Move Down:	Move down in the list
Exit:	Exit the application

RSS->Select

Pressing "Select" brings up a list of topics or articles from the selected channel. Each subsequent page provides the following functions:

Select:	View the selected topic or article
Back:	Return to the previous page

Speed Dial 8/100

The Speed Dial application provides users with the ability to dial from their Clearspan® Speed Dial list. As well, if the phone type allows, the add, remove, and edit of entries in the list is possible. It works with either Clearspan® Speed Dial 8 or 100.

Important: This application must know which Speed Dial type the user has provisioned. This is done by adding the parameter "is100" with one of the following values:

- Is100=0 Indicates Speed Dial uses Speed Dial 8
- Is100=1 Indicates Speed Dial uses Speed Dial 100

Your System Administrator might provide two separate soft key definitions to support users with each type of speed dial.

For example, the following key definition provides Speed Dial using Speed Dial 100:

http://%CS_SOFT_KEY_URI%/cs.php?is100=1

User Guide

The Speed Dial 8 and 100 applications are available for assignment to any program key, soft key or hard key on a Mitel phone. However, the application's capabilities on phones that have no soft keys are significantly reduced in that no adds, edits, moves or deletes are allowed. This section is divided to describe functionality for phones that have no soft keys vs. phones that have soft keys.

Speed Dial 8/100 Functionality for Phones with no Soft Keys

When the Speed Dial application is launched on a phone that has no soft keys, the user is presented a screen similar to the following that identifies the number of Speed Dial entries.

Speed Dial 1 / 10

Use \mathbb{Q} to view

The list of Speed Dial entries may be scrolled through via the navigation keys. The user navigates to the required entry and presses the Line key to initiate a call to the selected speed dial number.

The speed dial entries are managed by editing the user on OpEasy and selecting the 'Speed Dial 8' or 'Speed Dial 100' service. There is no ability to add, delete or modify entries via the phone.

Speed Dial 8/100 Functionality for Phones with Soft Keys

When the Speed Dial application is launched on a phone that has soft keys, the user is prompted with the "Speed Dial" menu to select the entry to dial or modify. The list is displayed as a menu (the user may move Up or Down the list to select an entry). If multiple pages exist the Page Up or Page Down buttons are visible (also, the page number and total pages are displayed, for example, 1/5). From this display the user has the following options:

Speed Dial

Dial:	Dial the selected name from the list
Display:	Display phone number and name for the entry
Options:	Select additional options (Add, Delete, etc.)
Cancel:	Exit the application

Speed Dial->Dial

Pressing "Dial", of course, dials the phone number for the selected entry.

Speed Dial->Display

Pressing "Display", shows the phone number and the name assigned to the selected entry. The following functions are available on this screen:

Dial:	Dial the phone number for the selected entry
Edit:	Edit the phone number for the selected entry
Back:	Return to the previous page
Cancel:	Exit the application

Speed Dial->Display->Dial

Pressing "Dial", of course, dials the phone number for the selected entry.

Speed Dial->Display->Edit

Pressing "Edit" displays the speed dial entry and allows the user to modify the phone number. The following functions are available on this screen:

Backspace:	Back space entered characters to correct the entry
Space:	Add a space character to the entry
abc:	Change from alpha to digits, etc
Done:	Save changes and return the previous screen
Back:	Return to the previous page
Cancel:	Exit the application

Speed Dial->Display->Done

Pressing "Done" saves the change and return to the previous screen.

Speed Dial->Options

Pressing the "Options" button provides a menu with the following 4 options:

Add (add a new entry)

Edit (edit the selected entry)

Delete (delete the selected entry)

Move (move the selected entry to a new speed code)

The following functions are available on this screen:

Select:	Execute the selected option
Back:	Return to the previous page
Cancel:	Exit the application

Speed Dial->Options->Add

Selecting the "Add" function allows the user to add a new Speed Dial number to their list. The user is prompted to enter the following:

"Enter Speed Code"

"Enter Number"

"Enter Name"

Each of these screens provides the following functions:

Backspace:	Back space entered characters to correct the entry
Done:	Save changes and return the previous screen
Back:	Return to the previous page
Cancel:	Exit the application

Speed Dial->Options->Add->Done

Pressing "Done" saves the change and continues. After the name has been entered it returns to the previous screen.

Speed Dial -> Options->Edit

Selecting the "Edit" function allows the user to modify the name for the selected speed dial entry. The following functions are available on this screen:

Backspace:	Back space entered characters to correct the entry

Space:	Add a space character to the entry
abc:	Change from alpha to digits, etc
Done:	Save changes and return the previous screen
Back:	Return to the previous page
Cancel:	Exit the application

Speed Dial->Options->Edit->Done

Pressing the "Done" button saves the change and return to the previous screen.

Speed Dial->Options->Delete

Selecting the "Delete" function allows the user to delete the selected speed dial entry. The user receives a confirmation screen asking if they want to delete the displayed speed dial entry. The user must press one of the following:

Yes:	Will delete the entry and return to the previous screen
No:	Will just return to the previous screen without change

Speed Dial->Options->Move

Selecting the "Move" function allows the user to modify the speed code for the selected speed dial entry. The following functions are available on this screen:

Backspace:	Back space entered characters to correct the entry
Done:	Save changes and return the previous screen
Back:	Return to the previous page
Cancel:	Exit the application

Speed Dial->Options->Move->Done

Pressing the "Done" button saves the speed dial entry to the new code and returns to the previous screen.

Appendix E: Polycom Key Definitions

Call Fwd Off

#21

Call Fwd On

*21

Call Pickup

*98\$Tinvite\$

Call-Park

\$Chold\$*68\$P(ParkNum)N4\$\$Tinvite\$Call-Rtv

CallMRtrv

*88\$P(ParkNum)N4\$\$Tinvite\$

Conf

Direct Pickup

Empty

Favorites

Line

Paging

Park

Park Rtrv

Pickup

Recent

Retrieve

Speed 8/Speed100

ZipDial/ZipDial2

Appendix F: Panasonic Key Definitions

Blind Transfer

Call Park

Used to park or retrieve a call in a preset parking zone.

Conference

Establishes a multi-party conversation.

Flash/Recall

Disconnects the current call and allows you to make another call without hanging up.

Incoming Call Log

Makes a call using the Incoming Call Log.

Intercom

Intercom Call

Intercom calls can be made between handsets/desk phones.

Menu

Mute

Disables your microphone while listening to the other party.

Noise Reduction

Original

Outgoing Call Log

Outgoing Log

Makes a call using the Outgoing Call Log.

Page

(Paging) Makes a voice announcement to the handsets or the desk phones simultaneously.

Park Rtrv

Pause

PhoneBook/PhoneBook

(PhoneBook) Makes a call using the PhoneBook.

Private Hold

Redial

Redials the last number.

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