Clearspan® OpEasy®
Basic Provisioning Guide

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Clearspan OpEasy Basic Provisioning Guide
Release #4.10 –April 2018

REVISION HISTORY

The following represents the revision history of this publication:

REVISION NUMBER	DATE COMPLETED	POINT OF CONTACT	DESCRIPTION
2827-016	4/2018	Mitel Technical Publications	R4.10
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2827-005	06/2014		R3.10
2827-004	04/2014		Updates and Revisions for R3.9.
2827-003	09/04/2013		Updates and Revisions for R3.6.
2827-002	07/08/2013		Updates and revisions for R3.5.
2827-001	04/25/2013		Initial release of this publication.

OVERVIEW

The primary purpose of the OpEasy® Provisioning application is to simplify the process of adding users, features, and devices to the Clearspan® system.

This document provides instructions on functions generally available to Department Administrators (DAs) such as adding, modifying, and removing users. Advanced provisioning topics such as assigning user features, exporting, phone templates, phone management, and group settings are covered in the Clearspan OpEasy Advanced Provisioning Guide.

LOGGING IN

Your system administrator will provide your username and password. Your system administrator will also provide the URL for your login, shown below.

1. Enter the URL (case sensitive) into your web browser. It will be similar to the following:

http://<Fully Qualified Domain Name> or <IP Address>/opeasy/

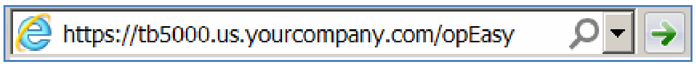


Figure 1 Explorer Search Box with URL

2. Enter the **User Name** and **Password** provided by your system administrator.

3. Click **Login**. The OpEasy main page displays as the following image.

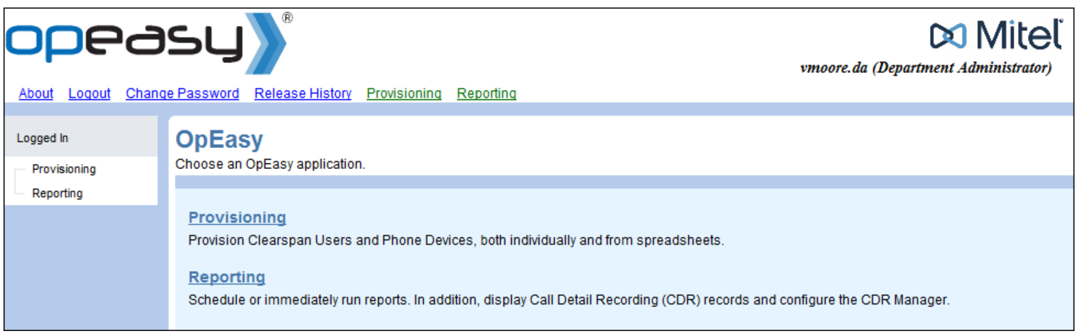


Figure 2 OpEasy Main Page for Department Administrators

4. Click on **Provisioning**. The Provisioning page displays as in the following figure.

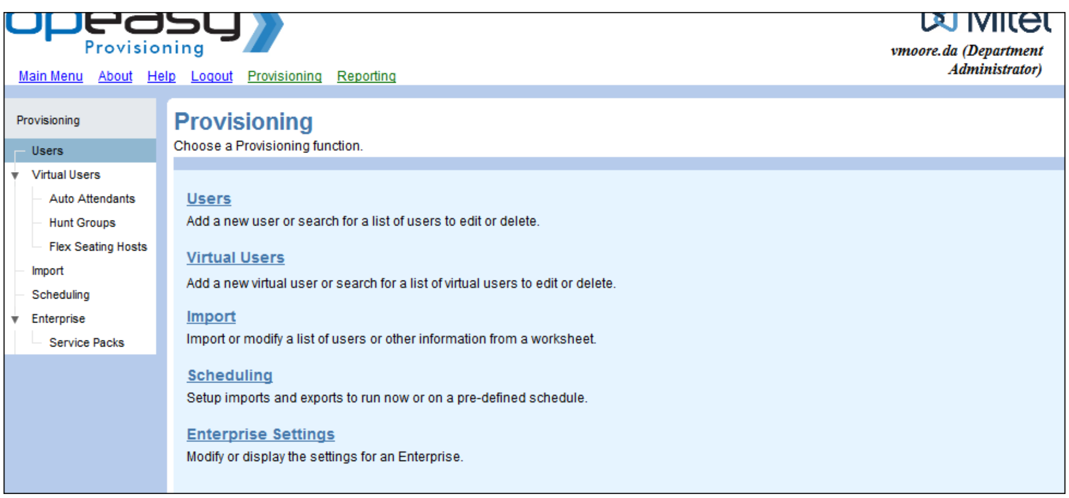


Figure 3 Provisioning Main Page

The options that you see, both on the main page, and in the pages that follow for each function, depend upon licensing and your assigned user privileges. Direct any questions to your system administrator.

ADDING A SINGLE USER

This section describes the process of adding a single Clearspan user.

When new users are created, an email is sent to the new users with instructions for setting up their Mitel or Polycom phones.

USER ADD PAGE

1. From the OpEasy main menu, click **Provisioning**.
2. From the Provisioning page, click **Users** from the menu tree on the left, or click **Users** from the Provisioning menu. The Users page displays as in the following image.

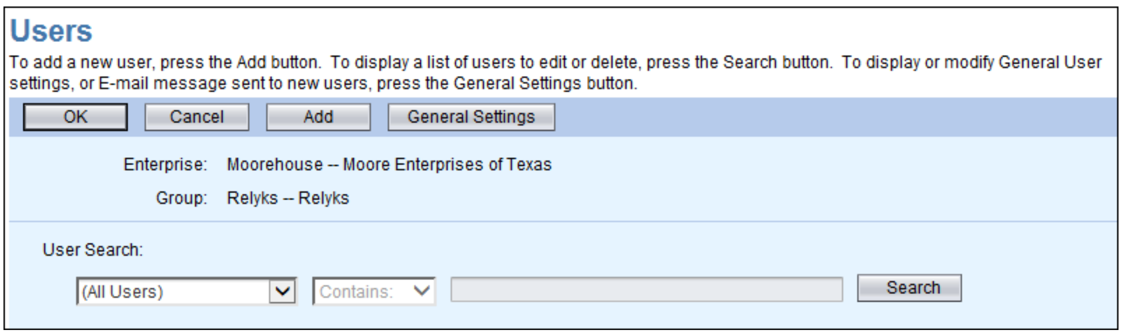


Figure 4 Users Main Page

The **Enterprise** and **Group** associated with this DA's login are displayed. If the login is other than a DA, you may be prompted to select this information.

3. Click **Add**. The User Add page displays. If no license is available, an error displays.

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

4. Select the **User Profile** from the drop-down list. You can select User Profiles for Polycom phones when the Polycom Phone Support system license for Clearspan is installed.

Click the **View Template** button if you want to see the template that will be assigned to the phone. The template assignment is made in the User Profile that you selected.

5. Enter the **Last Name**, **First Name** and **E-mail Address** of the user to add.
6. Select the **Department** and **Phone Number**.

Click the **View Phone Template** button if you want to see the template for the primary phone. This is the same template as displayed under **View Template**.

7. Enter the physical location of this user's phone device in **Phone Location**. This can be the address, building, office, or any type of description the system administrator has set for this value.

If the Emergency Gateway Manager is in use, your System Administrator will set the Emergency Response Location (ERL).

8. Enter the **Voice Portal Passcode**. It should be a numeric value, four to eight digits in length.
9. Enter the **User Password**. It can include any character, but must be include at least three characters; the number of characters to enter is set by the administrator. You can click **Initialize User Password to random password** to protect the user from unauthorized access in cases where the password will not be used.

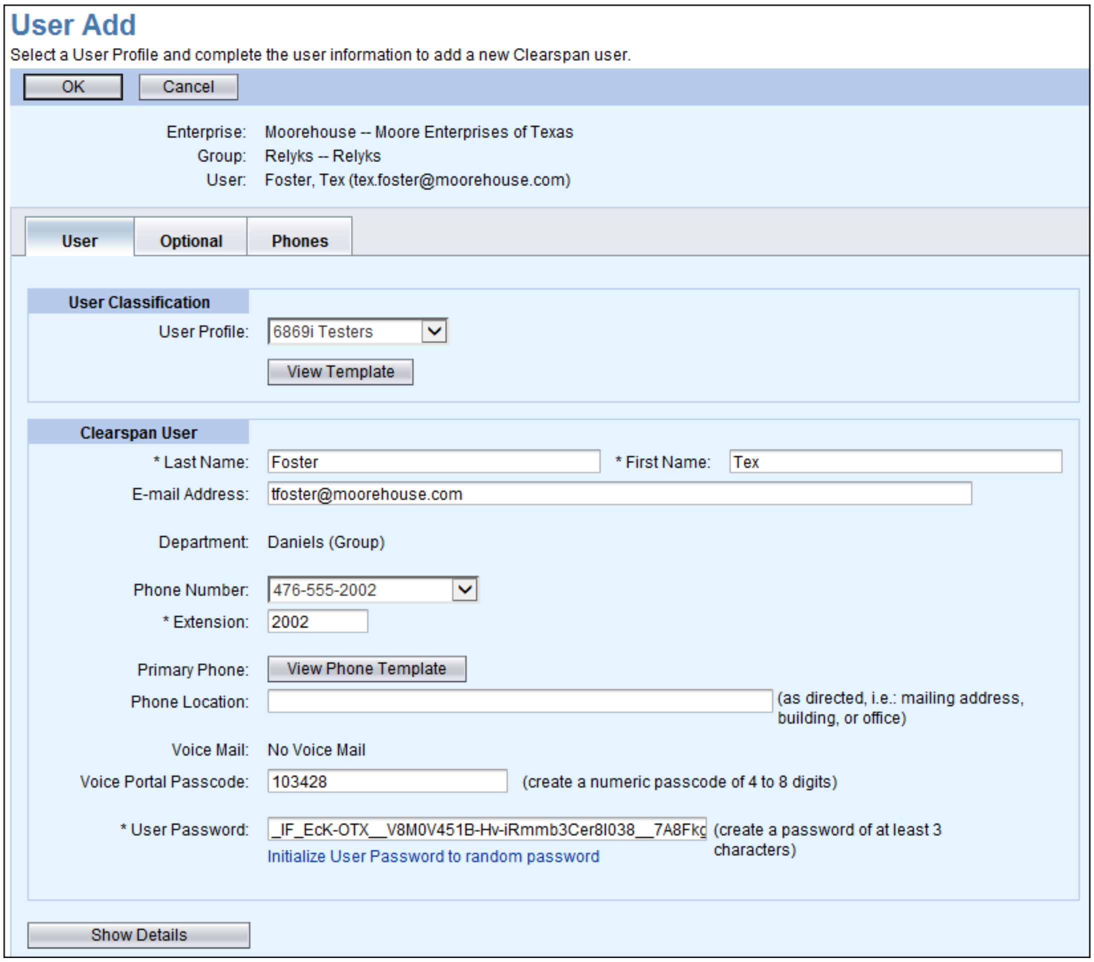


Figure 5 User Add Page – Populated with Show Details Button

10. Click **Show Details** at the bottom of the page if you want to see additional details of the User Add page. The hidden information is automatically generated as you enter user information on the top half of the page. There is no need to change any of this information.
11. 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.
12. View or modify the four sections of additional information as necessary.
    - **New User Notification**–Mitel, Panasonic, and Polycom phones only
    - **User Information**–The Clearspan User ID, Extension, and Network Server Site.
    - **Calling Line ID**–The Calling Line ID name and number.

- Service Packs selection–click on the Service Pack(s) on the left and click **Add**
- **Authentication**–User Name and automatically generated password. If you change this password, valid characters are a-z, A-Z, 0-9, blank, or special characters: - _ . , ! $ % & * + / = ? ^ { } | ~ @. 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.
- **Primary Phone Device**–The device name, line/port, VLAN ID, and MAC address, and the Device Access Username and Password for Polycom devices. Leave the VLAN ID blank unless your device uses VLAN operation. If the device is a Mitel (Aastra) phone, enter a temporary MAC Address to use as the Auto Install Device ID. This value is typically the user's extension, but might need to be set to something else if multiple groups share the same sets of extensions. If the device is a Polycom phone, enter a true MAC Address or leave that field blank. Valid Device Access Password characters are a-z, A-Z, 0-9, blank, or special characters: - _ . , ! $ % & * + / = ? ^ { } | ~ @.

13. Click **OK**.

You can click OK without viewing the other tabs, or you can go to the Optional tab and Phones tab. If you click **OK**, all input up to this point is validated and saved, the user is successfully added to Clearspan, and you are returned to the previous Users page where the new user appears in bold text in the user list.

Optional Tab

Click on 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.

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

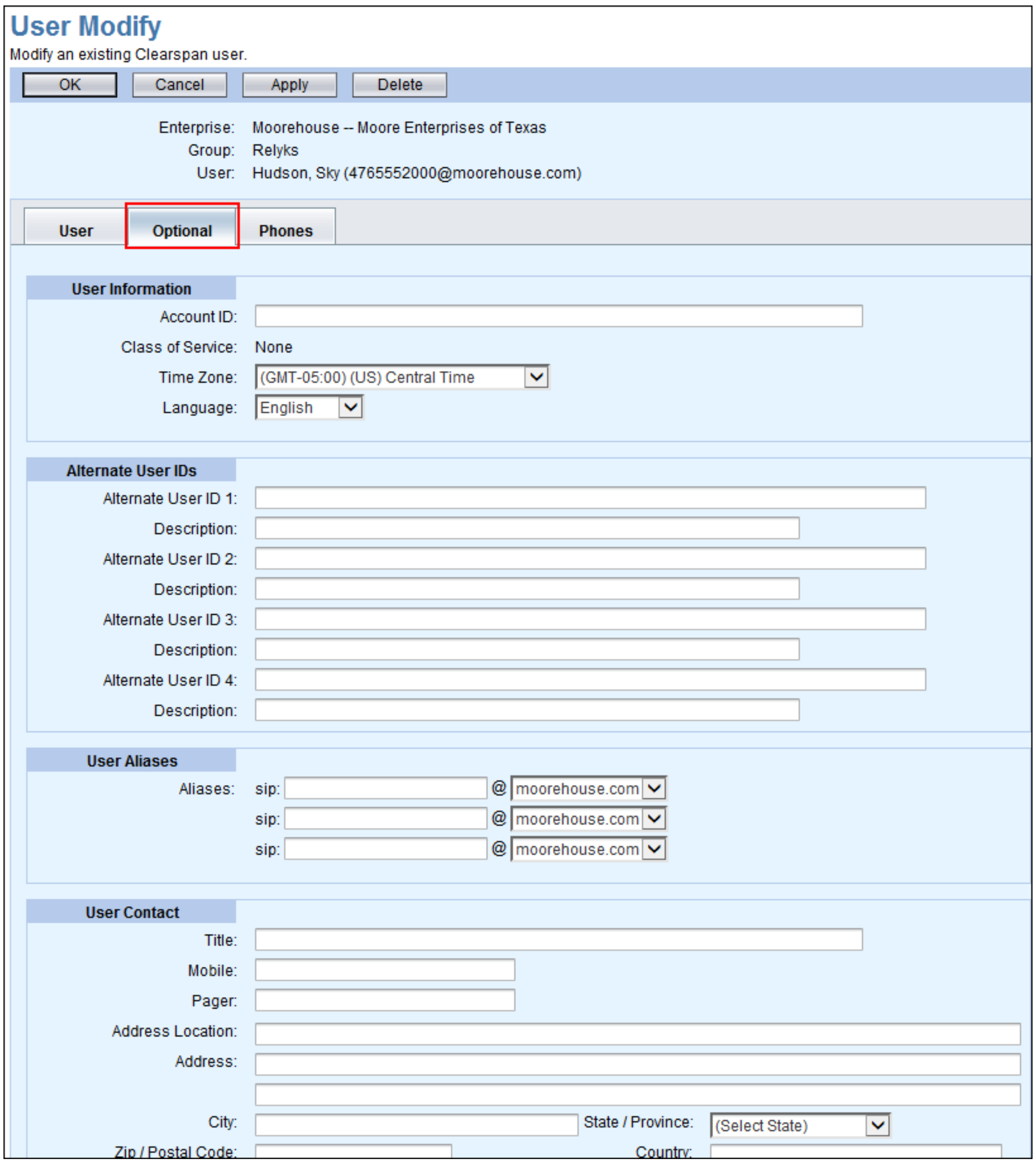


Figure 6 User Add Page – Optional Tab

Phones Tab

Click on the **Phones** tab of the User Add page to view the Phone Configuration and Shared Call Appearances, and view the primary phone device. (The **Restart Selected Phones** button is not available when creating a phone. It is only available when modifying a phone.)

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

Note: There are two View links in the Phone Devices table. The View button takes you to the User: Phone Template page, and the View link in the last column takes you to the User: Primary Phone Device View page.

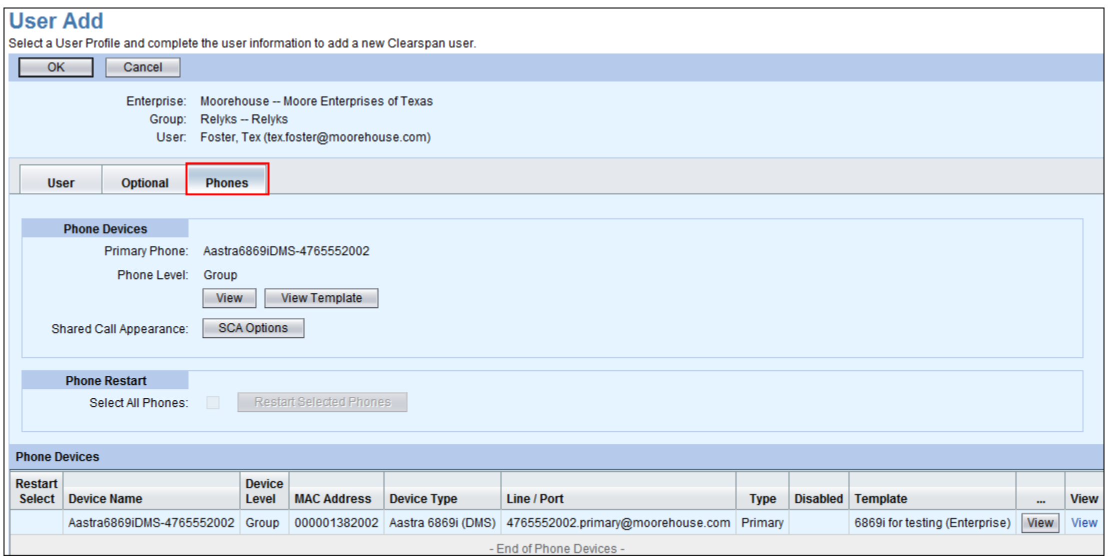


Figure 7 User Add – Phones Tab

User: Primary Phone Device View

The User: Primary Phone Device View page is read only and has the following sections.

Figure 8 User: Primary Phone Device View

- **Phone Device**–Device Name, Level, and Type, and the Template Name, Level, and Description.
- **User Line**–Displays the line/port and where the line appears on the phone.
- **Device Description**–Additional information about the device in Clearspan, including the Physical Location.

- **Device Configuration**–Additional information about the device in Clearspan, including MAC address and Device Access information, when applicable.
- **Stand-Alone Survivability**-Information about SAS Gateway and Ports.
- **Phone Device Users Table**–This table contains information about users that are on the phone, including this user.

From the User: Primary Phone Device View page:

- The **View Template** button takes you to the User: Phone Template page, where you can view a graphical layout of the phone template.
- The **Custom Tags** button takes you to the Primary Phone Device Custom Tags page where you can view the name and value of any custom tags configured for the device.
- The **Custom Rings** button takes you to the Primary Phone Device Custom Ring Tones page where you can view the ring selections for each line on the device.

User: Phone Template Page

The User: Phone Template page is read only. This display is the phone device/template of this user's phone. The following information is displayed:

- The Enterprise and Group associated with the user.
- The Phone Device Type, Template Name, and Template Level. These values come from the User Profile, which is created by advanced OpEasy administrators.
- Photo of the phone device, along with the soft key/hard key descriptions.
- Detail of hard keys on the phone that have been changed from their default usage.

User: Phone Template

View the details of the phone template assigned to a phone device of the user.

OK

Enterprise: Moorehouse -- Moore Enterprises of Texas

Group: Relyks -- Relyks

Phone Device Type: Aastra 6869i (DMS)

Template Name: 6869i for testing

Template Level: Enterprise

Description: phone template for Test Team

Telephone Line	Phone Number	Line Label	Ring
Line 2	2nd Phone Number	Extension	Ring 2
Line 1	1st Phone Number	PhoneNumber	Ring 7

Top Soft Keys	Function	Options
TSK1	Call Fwd	1st Phone Number
TSK2		
TSK3		
TSK4		
TSK5		
TSK6		

Top Soft Keys	Function	Options
TSK7		
TSK8		
TSK9		
TSK10		
TSK11		
TSK12		

Soft Keys	Function	Options

Figure 9 User: Phone Template Page

SCA Options Tab

Shared Call Appearances are created by advanced administrators. When you click on the **SCA Options** button on the User Add page, the SCA-related settings appear, but they are not modifiable.

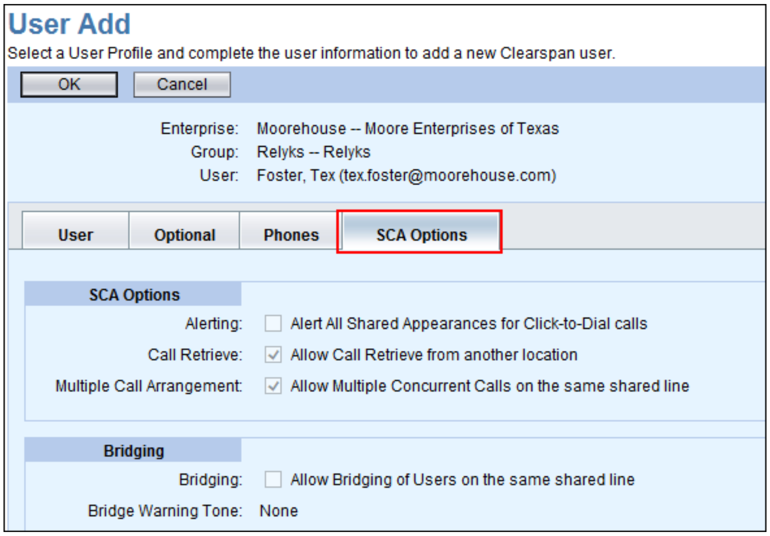


Figure 10 User Add – SCA Options Tab

USER SETTINGS

You can view Account ID and Integrated IM&P 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 displays.
3. If Account ID under System Settings is set to Required, the administrator must enter an Account ID when creating or modifying a user. The Account ID under Enterprise Settings can be Required, Not Required, or Use System Setting, which uses the setting selected above. This setting appears only when an Enterprise is specified. The Account ID under Group Settings can be Required, Not Required, or Use Enterprise Setting, which uses the setting selected above. This setting appears only when a Group is specified.
4. The Integrated IM&P setting under Enterprise Settings can be set to Use System Setting or IM&P Service Domain, with the service domain entered in the text field. This setting appears only when an Enterprise is specified. The Integrated IM&P setting under Group Settings can be set to Use Enterprise Setting or IM&P Service Domain, with the service domain entered in the text field. This setting appears only when a Group is specified.
5. 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 user's 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 displays.
3. Click **OK** to exit General Settings.

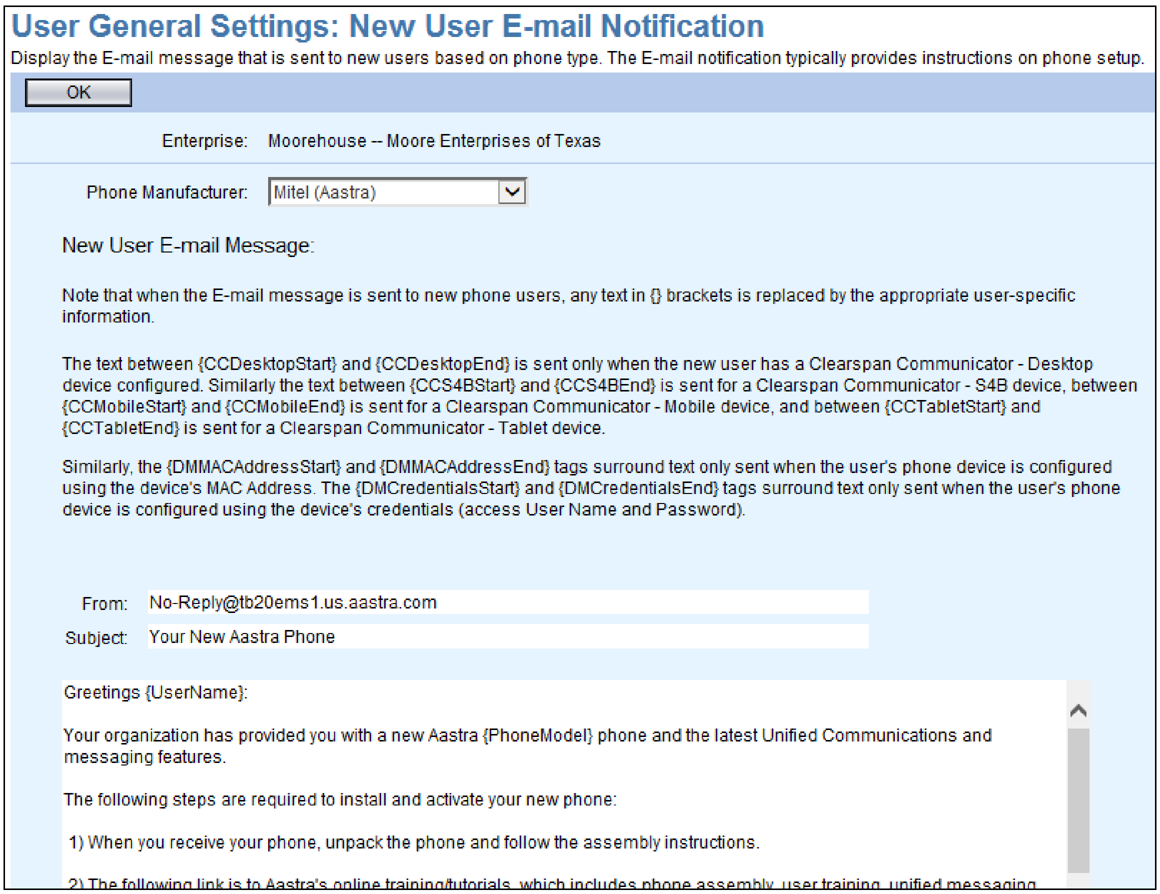


Figure 11 User General Settings: New User E-mail Notification

MODIFYING A SINGLE USER

The User Modify page displays when you access a user after it is created. The options are the same as in the User Add pages. You can modify those items that need to be changed.

1. From the main menu, select **Provisioning** and then **Users**.
2. Find the user to modify using the search fields. The default is to search for all users. However, you can narrow the search by adding search criteria as shown in the following illustration.

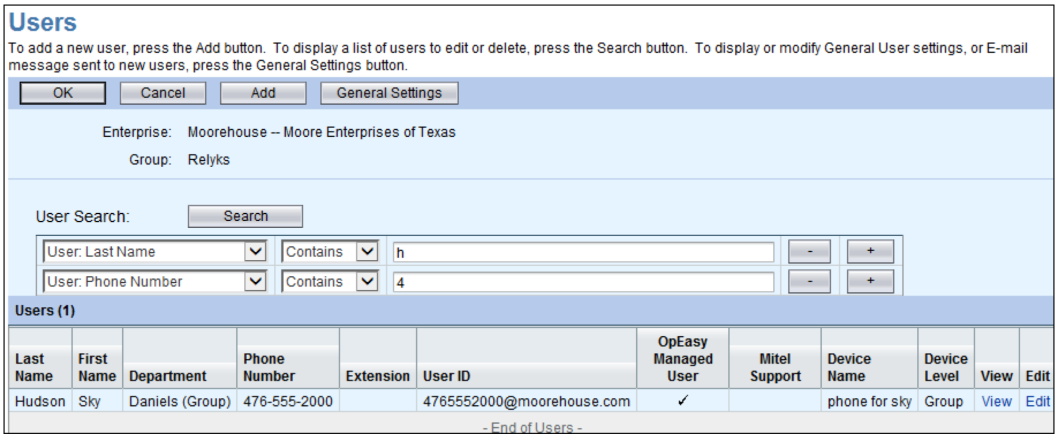


Figure 12 Search for User

3. Click on the **Edit** link at the end of the user's row. The User Modify page displays. (The View link opens the User View page, which displays user details that cannot change.)
4. Make any necessary changes to any part of the user's parameters. If no license is available when attempting to edit a user, a warning displays and the user modifications cannot be saved until additional licenses are allocated in the Enterprise.
5. Click **OK**. The Users page displays.

DELETING A SINGLE USER

You can delete a user entry 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 the **Edit** link on the end of the row of the user you wish to delete. The User Modify page displays with a Delete button.
4. Click **Delete.**
5. Click **OK** in the confirmation dialog box.
6. The user is deleted.
7. In addition, the following devices associated with the user are also deleted:
    - User's primary device, if any existed, but ONLY if that device has no other assigned primary users.
    - Any device that the user was assigned to as a Shared Call Appearance (SCA) but ONLY if that device has no other assigned users.
    - Any Clearspan Communicator device the user is assigned to.

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

ADDING MULTIPLE USERS WITH IMPORT

Note: Import is not available if you are not authorized to add or delete users.

One or more Clearspan users can be added or deleted by importing Microsoft Excel worksheets into the Clearspan system. If you add a user in the worksheet, those fields are added to Clearspan. If you remove a user in the worksheet, all information regarding that user is deleted from Clearspan. Saved worksheets provide records for reference.

The Basic Import worksheet requires that a User Profile is used. The User Profile(s) must exist prior to execution of the worksheet and those that do exist will be available for selection when using the worksheet.

Users and features can be processed depending upon your assigned privileges. In the Basic worksheet, only users and their voice mail options are generated. This document addresses the Import Basic type. The Import Advanced option is presented in the *Clearspan OpEasy Advanced Provisioning User Guide*.

OPENING A WORKSHEET

To add users 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 **Import: Basic** from the **Import Type** drop-down list on the Import page.
3. Click **Get Worksheet** to open a new spreadsheet, or click **E-mail Worksheet** to have a new spreadsheet sent in an E-mail message, as shown in the following example.

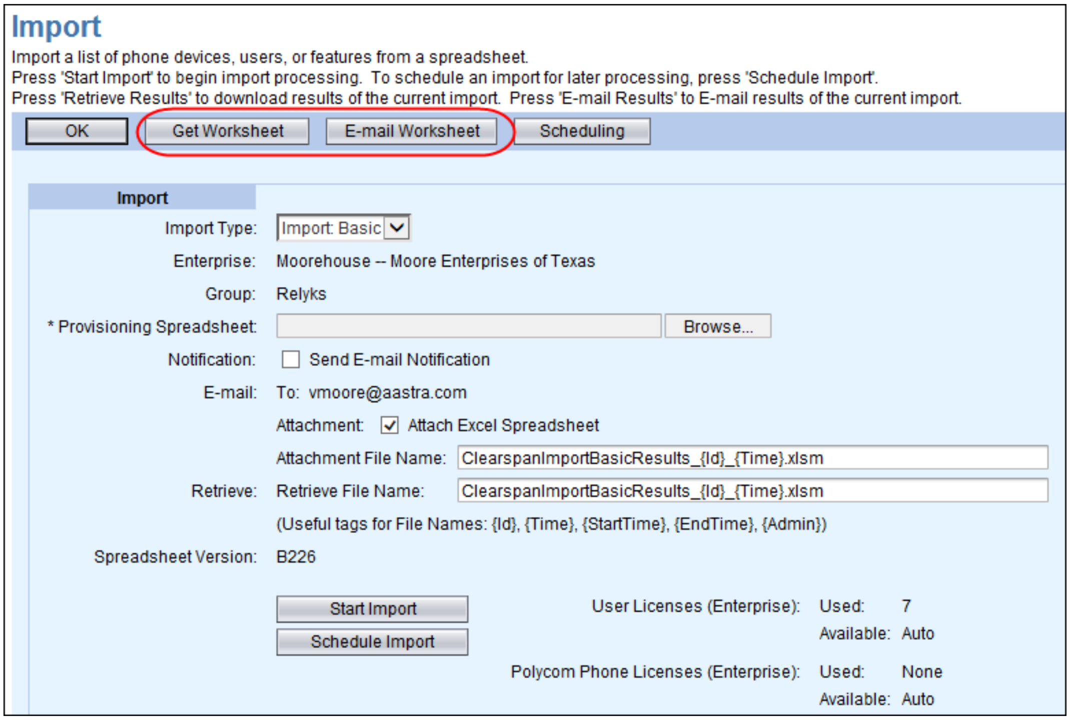
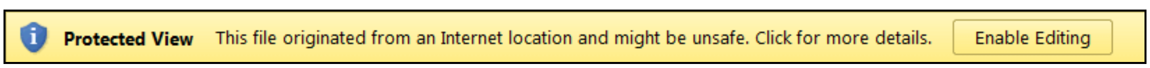
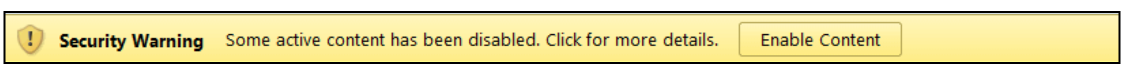


Figure 13 Get Worksheet Button

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**. Then click **Enable Content**.





The worksheet is now available for editing as shown in the following figure.

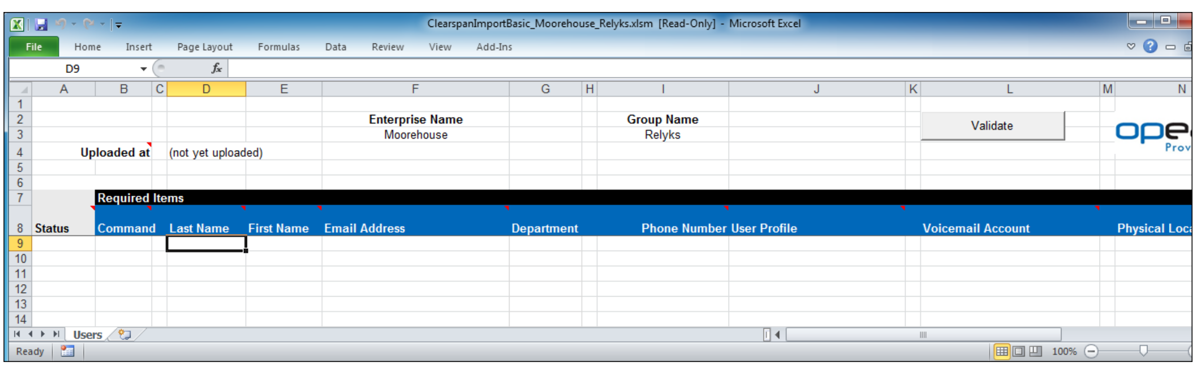


Figure 14 Basic Import Worksheet

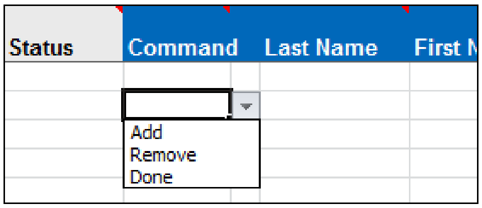
The following is a description of the basic worksheet starting at the top.

- The Basic worksheet has two tabs:
  - Users–There are only 10 fields that must be entered on the worksheet.
  - Voicemail–The voicemail fields are generated automatically. The Voicemail tab appears when at least one user is created that specifies a VMail account type.
- The name of the new worksheet, which is shown centered at the top, is “ClearspanImportBasic_” followed by the Enterprise name and Group name. You should save this file to another name that is more meaningful to you. The Import page shows tags that you can use in the file name if desired.
- To the right of the Enterprise and Group name headers is the **Validate** button. It is used to perform validation of data that is entered in the worksheet.

ROW	COLUMN	INFORMATION
2	F	Contains header ‘Enterprise Name’
3	F	Contains the enterprise selected
2	I	Contains header ‘Group Name’
3	I	Contains the group selected
2,3	L	Contains the Validate button
4	B, D	Contains header ‘Uploaded at’ followed by either: ‘(not yet uploaded)’ - if the sheet has not yet been imported or the date and time of the import - if the sheet has been imported
5	L	Contains results of validation
5	N	Contains version number (e.g. B225) of the worksheet
7	B - R	Contains header ‘Required’ to identify the columns required below
8	A - R	Contains the column labels. The provisioning tool will assume that the next row contains the first row of data, i.e. a valid command and field content.
Any after 8	A	This first column is the Status column. It is updated in the results spreadsheet to either ‘Success’ or ‘Failure’. A ‘Skip’ in this column will cause the row to be skipped on import.
Any after 8	AD	The rightmost column is the Processing Error column. It is updated in the results spreadsheet for any command that has a status of ‘Failure’.

ADDING USERS IN THE WORKSHEET

After you have retrieved and opened an Excel worksheet to use, fill it in with the information you want to import. The Users worksheet provides drop-down boxes for ease of selection for certain fields. To gain access to the drop-down box options, first click the cell where you wish to make a selection, and then the down arrow appears just to the right. Click the down arrow to choose an available option.



1. Click on a cell in column B and select **Add** from the Command drop-down list. You can only **Add** or **Remove** users in the Basic worksheet. The **Done** command ends the processing at the row where it appears.

2. Enter values in the other columns. Each column is described in the

3. Add Command Details section of this document.
4. Fill in a row for every user you want to add.
5. Select **Done** from the Command column drop-down list on the last row when you have entered all the users for this worksheet.
6. Click the **Validate** button to validate the user data entered as described in the

7. *Correcting* Validation Failures section of this document.

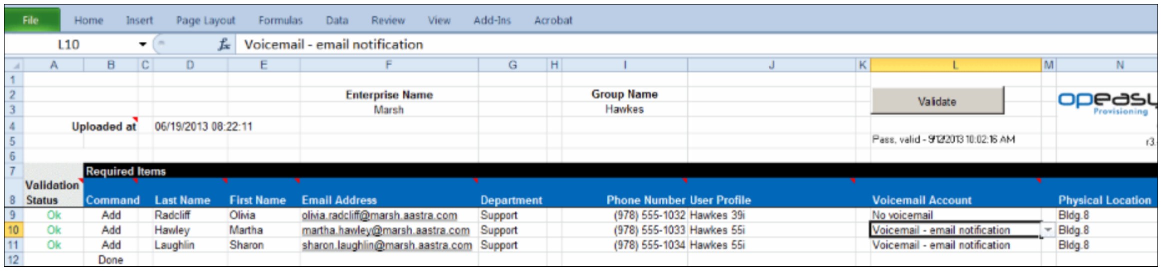


Figure 14 Worksheet Validated

8. Save the Worksheet locally with a descriptive name because you will be using this worksheet later. For example, you might want to save it as "**ClearspanImportBasic_Marsh_Hawkes_Add_3_Users_20140410.xlsm**".

Note: Spreadsheets are not interchangeable between Enterprises/Groups.

ADD COMMAND DETAILS

Each column on the Basic Worksheet's Users tab is contained in the table below. Refer to the section for each command for details specific to that command.

COLUMN NAME	COLUMN	FIELD REQUIREMENTS
Status	A	No entry is required but possible values include: **Skip** – entered by the admin to prevent command processing **Success** – filled by the system via the Results spreadsheet **Failure** – filled by the system via the Results spreadsheet
Command	B	Commands available via the drop-down box include: **Add -** Add a new user and its device. The Voicemail Account column (L) is automatically filled when the User Profile (J) is selected **Remove -** Remove a user and its device. **Done -** Ends processing of the worksheet.
	C	Reserved as the drop-down box for Command selection.
Last Name	D	**(Required)** Up to 30 characters. Most characters are acceptable but the first character cannot be a '+'. The combination of first and last name must be at least 5 characters.
First Name	E	**(Required)** Up to 30 characters. Most characters are acceptable but the first character cannot be a '+'. The combination of first and last name must be at least 5 characters.
Email Address	F	**(Required)** Up to 80 characters. Format: xxx@yyy.com (or .org, .net, etc.). xxx must be at least 6 characters. yyy.com must be known by the system. The address must contain the '@' symbol.
Department	G	Must match the name of an existing Department. Departments for the selected Enterprise/Group are available via the drop-down box.
	H	Reserved as the drop-down box for Department selection.
Phone Number	I	**(Required)** Up to 23 characters. E.164 format is supported. Must exist and be assigned to the Enterprise/Group. The System Administrator must provide the phone number range. Depending on the User Profile settings, the Phone Number may not be required because it is automatically selected by OpEasy.
User Profile	J	**(Required)** Must match the name of an existing User Profile. User profiles for the selected Enterprise/Group are available via the drop-down box.
	K	Reserved as the drop-down box for User Profile.

Voicemail Account	L	Selections are available via the drop-down box after a User Profile is selected (if selections are allowed via the User Profile). If no voice mail is associated with this user, the column does not have a drop-down list. Possible values include: **No voicemail** **Voicemail – no email notification** **Voicemail – email notification** **Voicemail – email delivery**
	M	Reserved as the drop-down box for Voicemail Account.
Physical Location	N	Identifies the user's location. This can be the address, building, office, or any type of description the system administrator has set for this value. If the Emergency Gateway Manager is in use, your System Administrator will set the Emergency Response Location (ERL). Optional, up to 1024 characters if entered.
Voice Portal Password	O	Enter digits (no alpha characters). If your user will be given the ability to retrieve voice mail messages from his or her phone, a voice portal password is required. This password is entered from the phone to allow entry to the voice mail portal. This portal is used for more than just voice mail access; for this reason, the worksheet allows entry of a password even if voice mail is not enabled. Passcode security rules are defined on Clearspan. Sets the passcode for this user. The value must be numeric and the system administrator typically sets the length between four and eight digits.
Clearspan Password	P	**(Required)** Enter alpha-numeric characters. Password rules are defined on Clearspan. The value can include any characters, and the minimum is usually six characters. Sets the Clearspan password for this user. This password is used to allow Clearspan user access to the Clearspan web portal, if authorized.
Device Access UserName	Q	Enter the device access user name. Required for Polycom devices when device management using device credentials is in use.
Device Access Password	R	Enter the password for the device access user name. Required for Polycom devices when device management using device credentials is in use.
Processing Error	AD	Used to provide detail of a failure in the Results Worksheet.

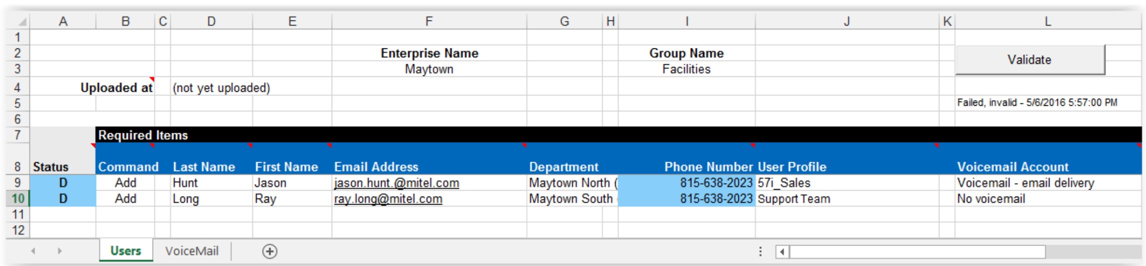
CORRECTING VALIDATION FAILURES

The Validate button is provided on the Basic Import worksheet so that contents of the worksheet can be tested prior to executing / importing the worksheet. To initiate validation, click the **Validate** button, and the results of the validation appear immediately on the worksheet.

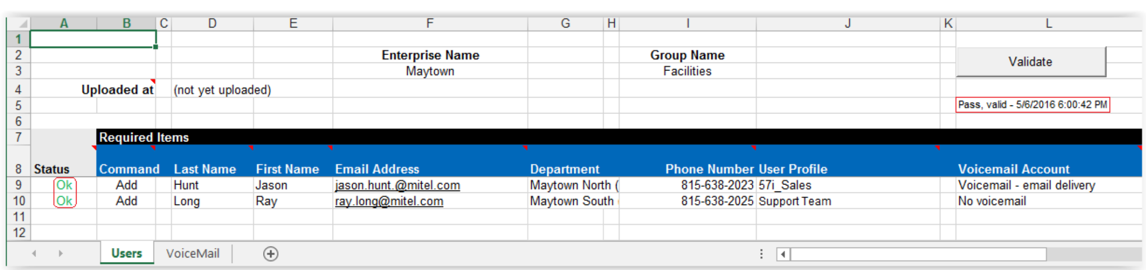
If the validation is successful, two things will happen.

- The Validation Status column, Column A on the far left of the row, will show Ok for each row where a command (other than Done) was issued.
- Below the Validate button, the text “Pass, valid” along with the date and time of validation appears.

When validation fails, the cells associated with failure are highlighted. In the following example, cells 9-I and 10-I are highlighted as are the associated Status columns. The ‘D’ under Status means that duplication appears. In this case, note that both users have been assigned the same phone number and this is not allowed.



In this example, if the duplication is removed and the Validate button is clicked again, no other issues are found; the worksheet reflects that the validation was successful with a ‘Pass’ status below the Validate button and ‘OK’ in the Status column. See the following example.



The validation process not only validates contents of the worksheet, but it also processes some of the underlying fields of data (e.g., UserId). For this reason, it is necessary to save the validated spreadsheet and then use this latest saved version for import.

IMPORTING THE WORKSHEET

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

1. In OpEasy, select **Provisioning** and then **Import**.
2. Select **Import Basic** from the **Import Type** drop-down list.

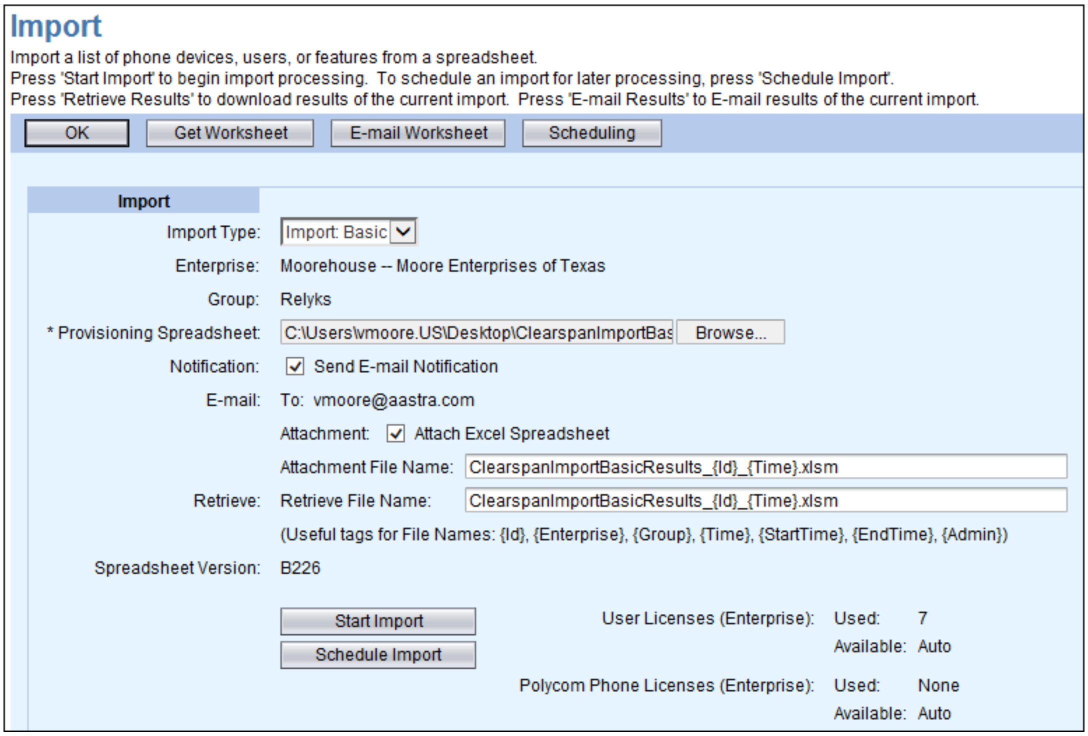


Figure 15 Import Page - Top Half

3. Select the **Enterprise/Group**, if necessary.
4. Enter the filename of the Provisioning Spreadsheet that you wish to run, or use **Browse** to locate it.
5. Check the **Notification** check box to have an E-Mail notification sent to the specified E-mail address with processing results.
6. Check the **Attach Excel Spreadsheet** box if you wish to attach the results spreadsheet.
7. 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.
8. 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.

9. 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 user, and a Polycom Phone License is required for each added 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.

10. Click **Refresh** while processing is active to get status updates. The "Import Basic completed successfully" message displays when processing is complete.

VIEWING IMPORT RESULTS

After the import has processed, the "*SUCCESSFUL: Import Basic completed successfully*" text displays at the bottom of the Import page. If the import completed with errors, processing details are displayed.

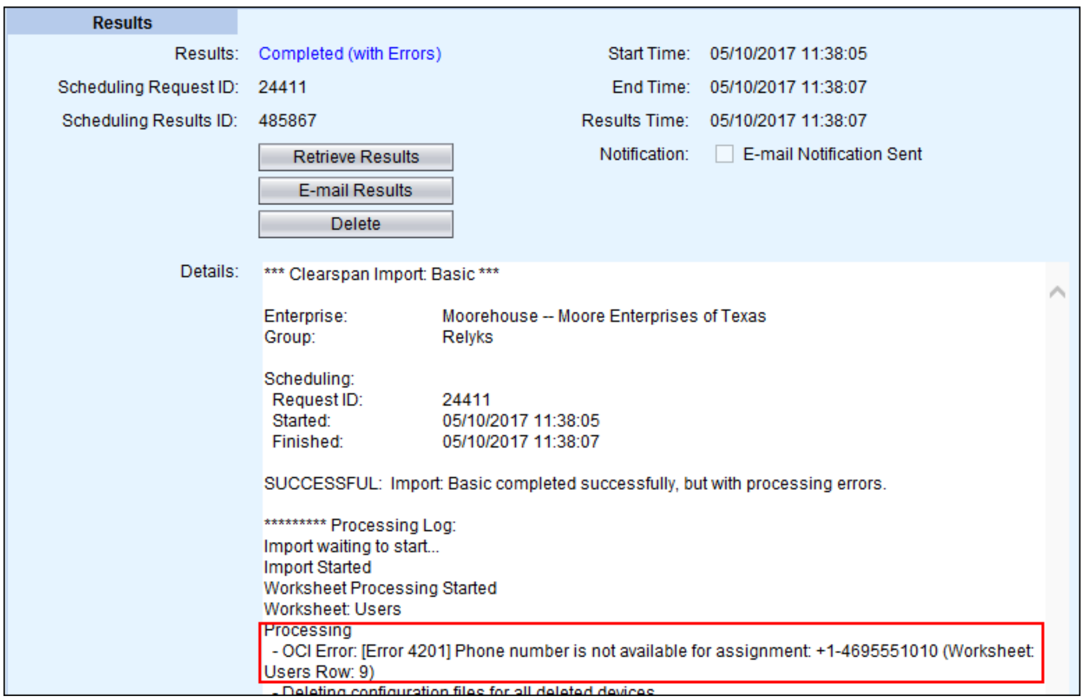


Figure 16 Progress Messages Error

Results can be retrieved immediately or sent by E-mail. The E-mail parameters on the Import page determine how the E-mail will be handled. Click **Email Results** to send the results of the current worksheet that was processed. To retrieve the results immediately, click **Retrieve Results** on the OpEasy Import page. The import results spreadsheet opens.

Users Tab

The Status column shows Success. This is an indication that each command was successfully performed.

The Processing Error column for each user shows no errors.

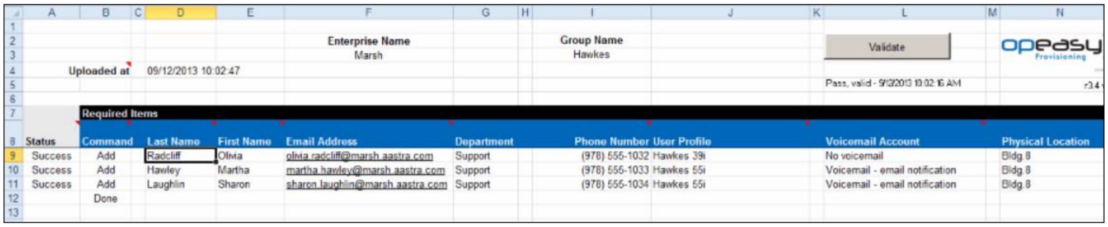


Figure 17 Results Worksheet

VoiceMail Tab

The VoiceMail tab appears when at least one user is created that specifies a VMail account type. As shown in Figure , the Status column shows **Success** in the first column of the VoiceMail Tab. The voicemail information has been updated successfully.

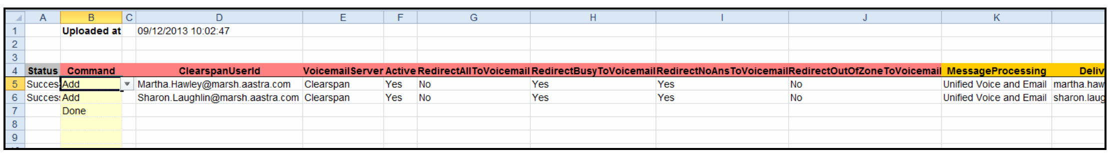


Figure 18 VoiceMail Tab

Error Examples on the Results Worksheet

The following example shows you what happens when an error is introduced in the worksheet. This example adds a user that has the wrong phone number.

On the Results worksheet in Figure 19 , the first column indicates “Failure”. Scroll to the right of the worksheet to view the Processing Error column content. The Error column indicates “OCI Error: [Error 4201] Phone number is not available for assignment: +1-9785551001.” This error means that the phone number is used by someone else or is not assigned to this group.   The solution is to enter a valid phone number for the user.

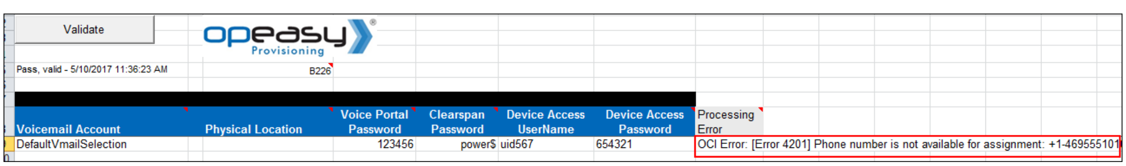


Figure 19 Validation Status Column - Failure

REMOVING MULTIPLE USERS WITH IMPORT

Note: Import is not available if you are not authorized to add or delete users.

If you have used a worksheet in the past to add multiple users, you can change the operation to "Remove" to delete those users. When using Basic Import to remove multiple users, you must start with the original Results worksheet that was created when the users were added. If you do not have the original Results worksheet, then you must use Advanced Import to remove multiple users, which allows specification of User ID.

1. Open the worksheet that was used to originally add the user(s) that you want to remove.
2. Select **Remove** from the Command drop-down list in column B. Do this for each user that you wish to delete.
3. Select **Done** from the drop-down list when you are finished.
4. Clear the values in the **Status** column. See the following example.

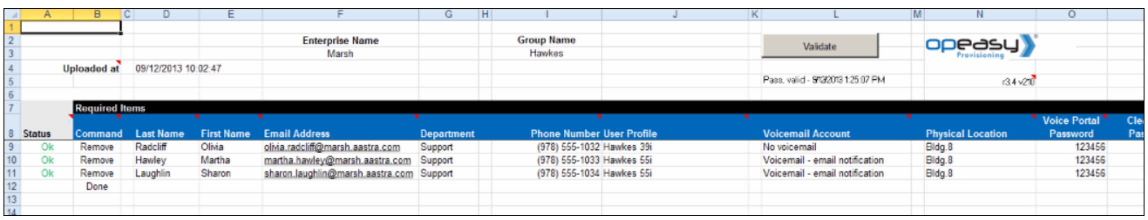


Figure 20 Worksheet – Validation

5. Click **Validate**. Validation removes the data in the Voice Mail tab automatically and provides a new status in the **Status** column.
6. Save the spreadsheet with a new name.
7. In OpEasy, select **Provisioning** from the main menu, and then select **Import**.

8. Click **Browse** on the Import page to locate the Provisioning Spreadsheet that you just saved.
9. Click **Open**. The Provisioning spreadsheet box is populated.
10. Click **Start Import**. The Status message box opens with the "Waiting to start…" message.

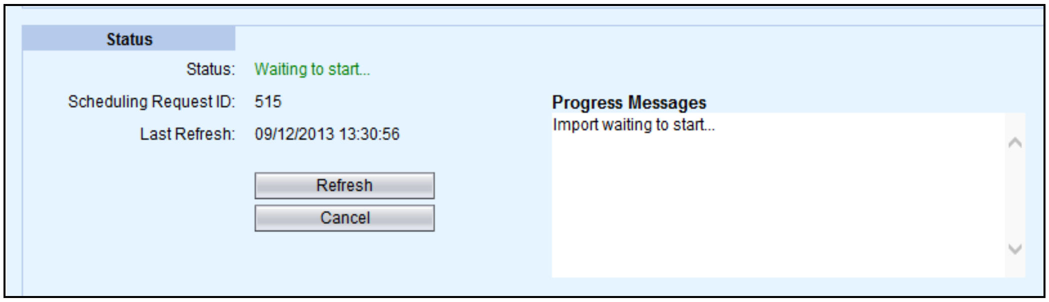


Figure 21 Remove User Worksheet Process Starting

11. Click **Refresh** to view the progress messages. The "Import Basic completed successfully" message displays when processing is complete. The users are deleted.

SCHEDULING AN IMPORT

You can schedule an Import on the Import page after you have selected a worksheet to process. The Scheduling page displays imports that have already been scheduled to run now or on a pre-defined schedule.

1. From the OpEasy main menu, select **Provisioning**, and then select **Import**.
2. Select **Import: Basic** as the Import Type.
3. **Browse** for the worksheet that you wish to schedule for import.
4. Make changes to the file names, if desired.
5. Click **Schedule Import**. The Scheduling Request: Import: Basic page opens as shown in Figure .

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

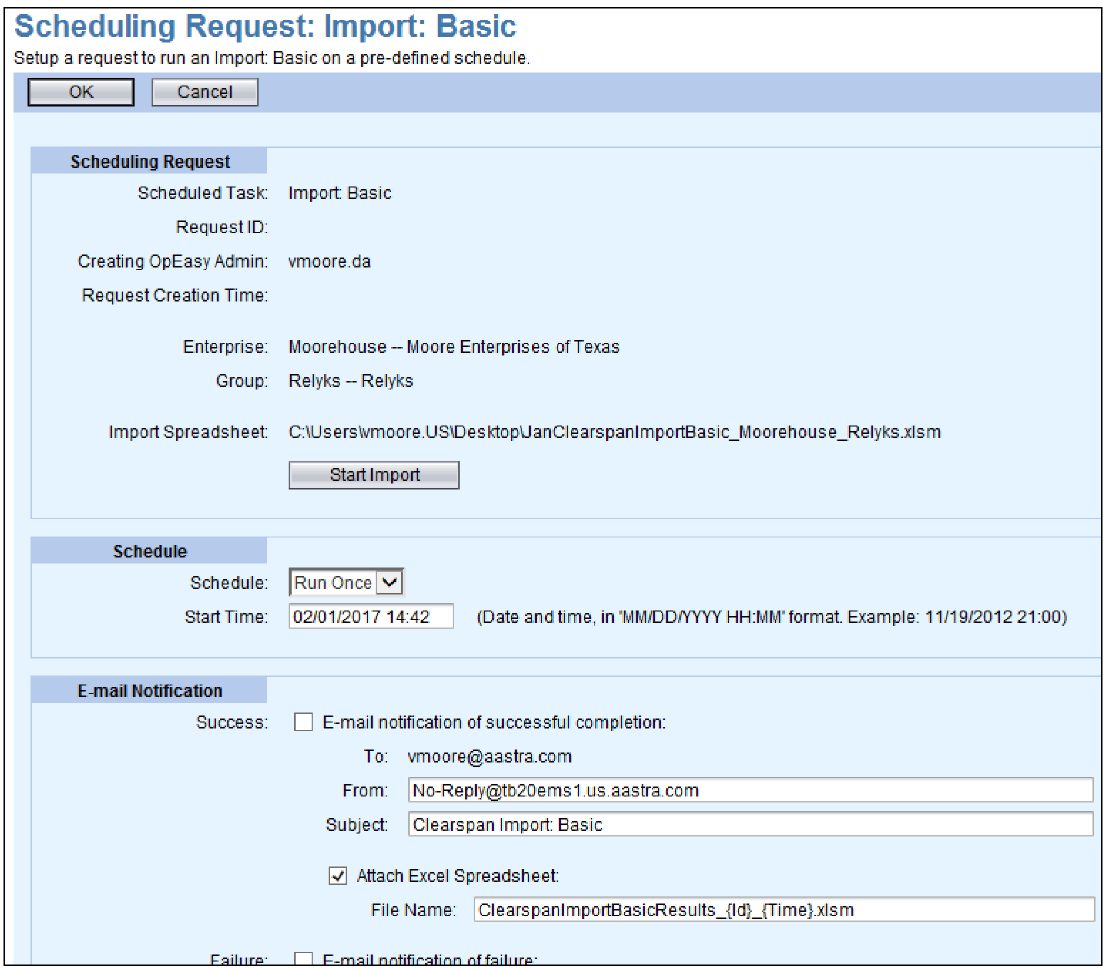


Figure 22 Scheduling Request: Import: Basic Page – Top Half

6. Select the **Schedule** type from the Schedule drop-down menu.

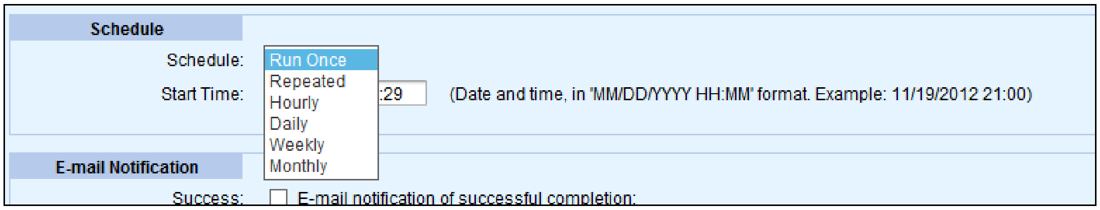


Figure 23 Selecting the Schedule Type

If you selected Run Once:

- Enter the Start Time: The date, a space, and the time (hour and minute). The Import runs only one time.

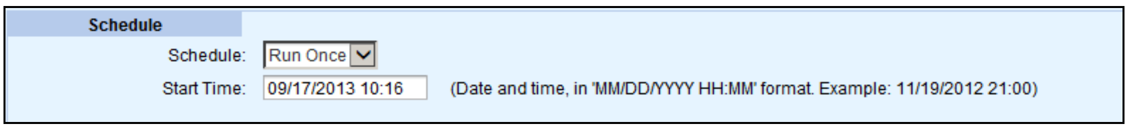


Figure 24 Schedule Run Once

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 runs every (number of minutes).
- Enter the Maximum Number of Runs. Leave the box blank or enter 0 if there is no limit.

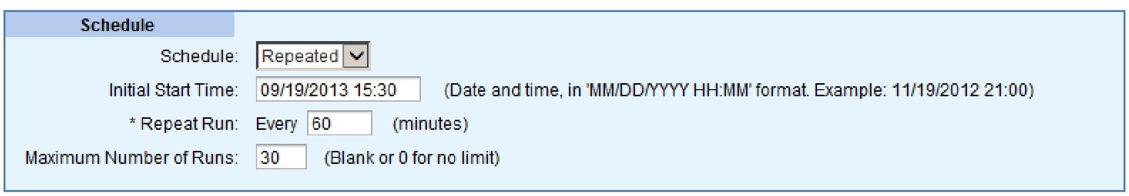


Figure 25 Schedule Repeated

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 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.

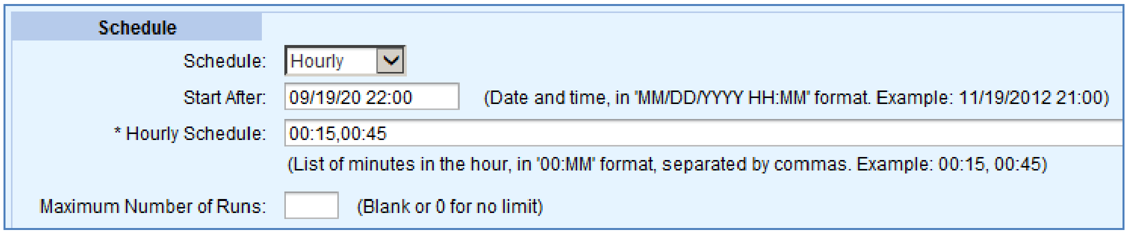


Figure 26 Schedule Hourly

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.

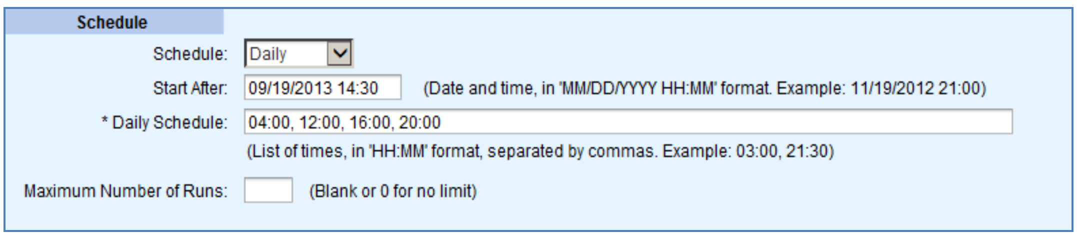


Figure 27 Schedule Daily

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.

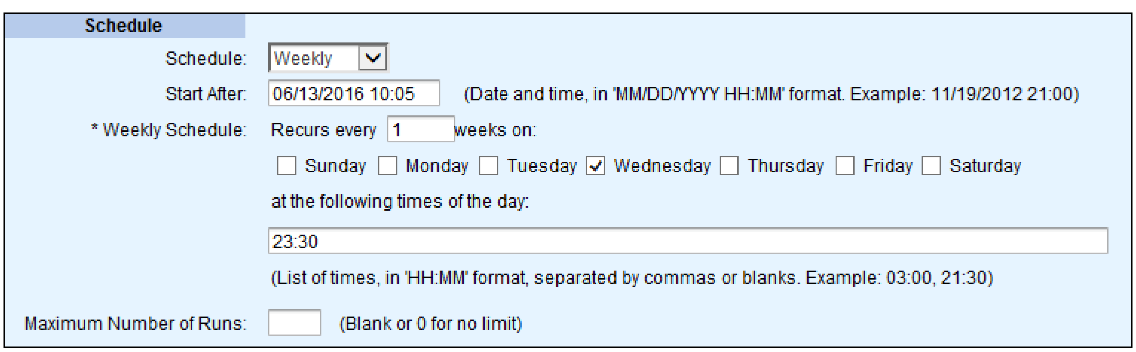


Figure 28 Schedule Weekly

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.

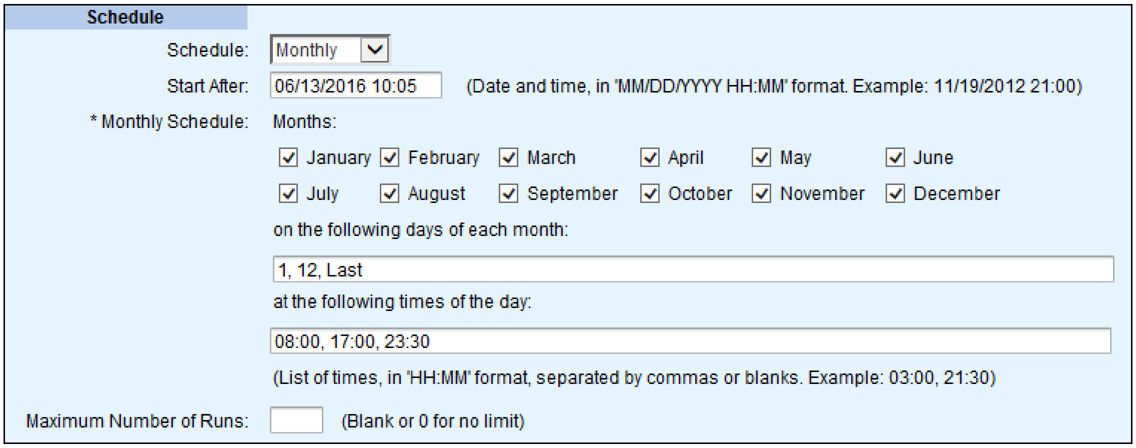


Figure 29 Schedule Monthly

7. Set up E-mail notification parameters. E-mails are sent to the E-mail address associated with your OpEasy Admin login. For worksheet imports 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 for an example.

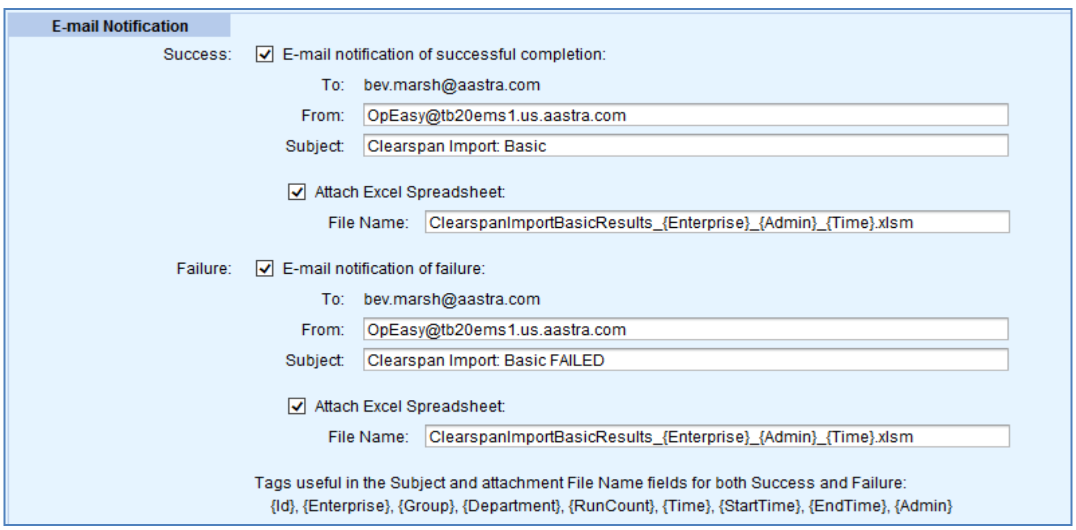


Figure 30 E-mail Notification Section - Setup

8. Click the **Start Import** button. The import will complete on schedule.

After you click Start Import, the screen refreshes and includes a Status section containing the current status of the Import as in the following figure.

- 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.

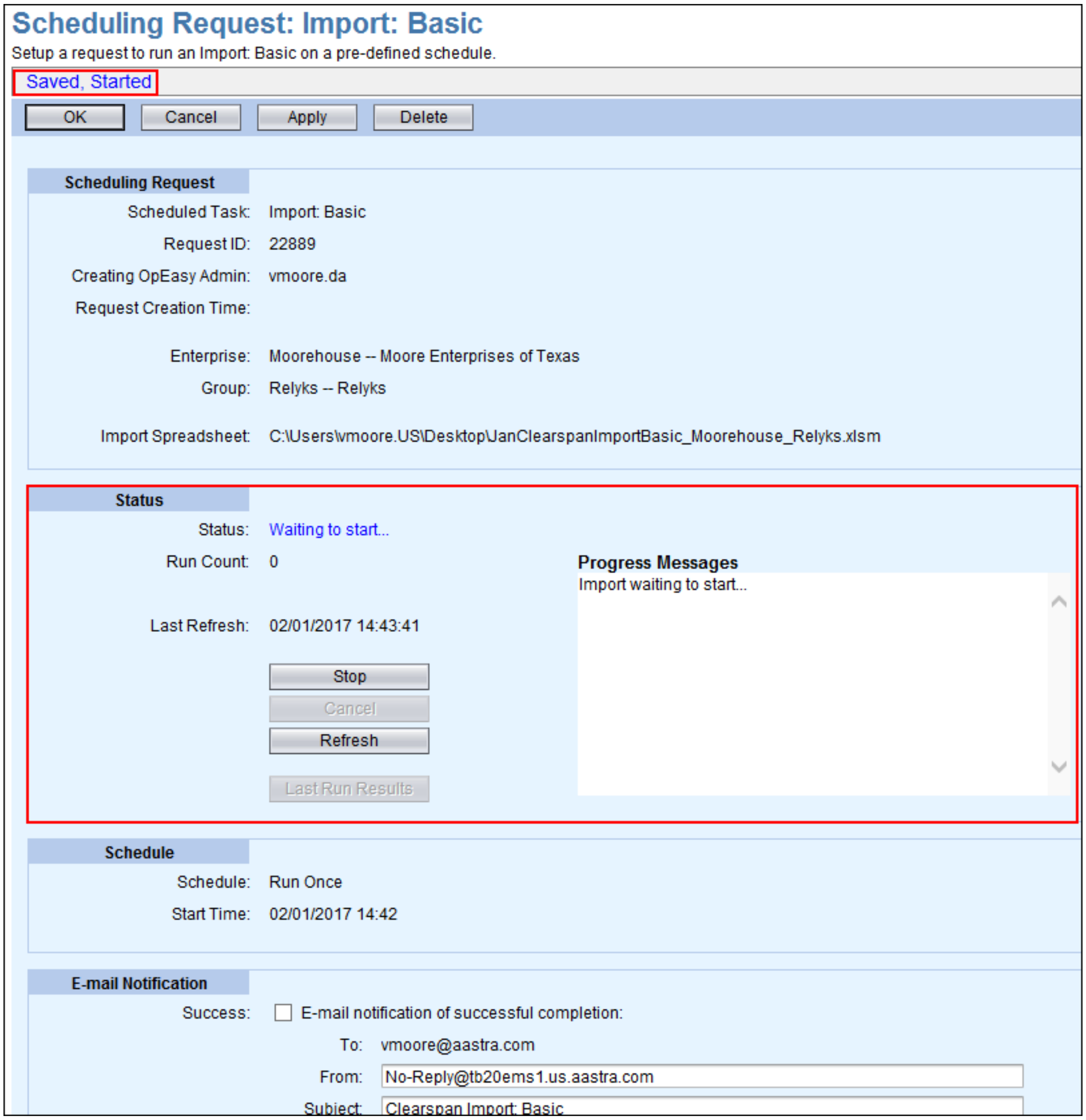
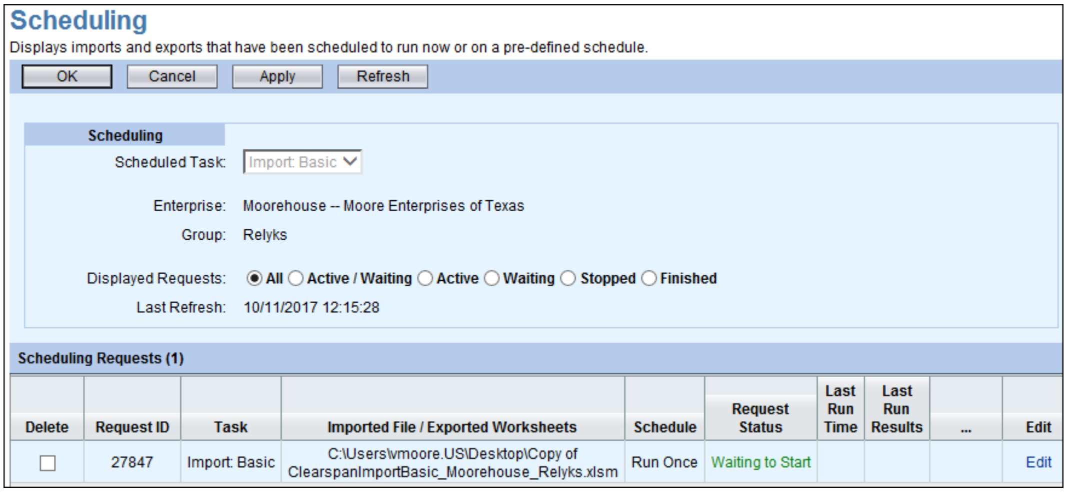


Figure 31 Status Section

VIEWING SCHEDULED IMPORTS

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.

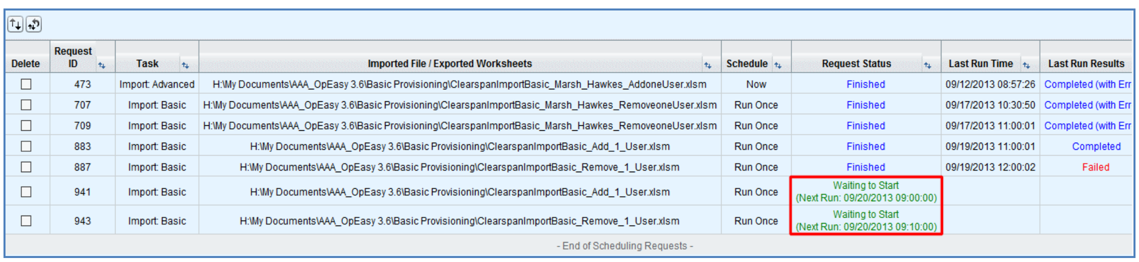
1. Click on **Provisioning** and then **Scheduling** in the menu tree, or click on the **Scheduling** button on the Import page. The Scheduling page displays with the current imports scheduled, finished, waiting to run, etc.
2. Select the **Scheduled Task** from the drop-down list. This filters the list of schedules.



Delete	Request ID	Task	Imported File / Exported Worksheets	Schedule	Request Status	Last Run Time	Last Run Results	...	Edit
☐	27847	Import: Basic	C:\Users\wmoore.US\Desktop\Copy of ClearspanImportBasic_Moorehouse_Relyks.xlsm	Run Once	Waiting to Start				Edit

Figure 32 Scheduling Page

The following example illustrates a scheduled worksheet that is waiting to start.

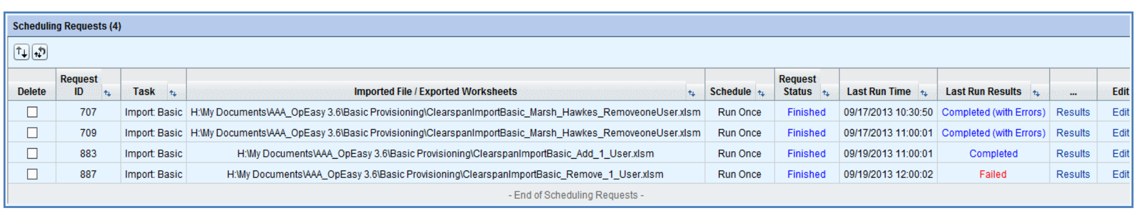


Delete	Request ID	Task	Imported File / Exported Worksheets	Schedule	Request Status	Last Run Time	Last Run Results
☐	473	Import: Advanced	H:\My Documents\AAA_OpEasy 3.6\Basic Provisioning\ClearspanImportBasic_Marsh_Hawkes_AddoneUser.xlsm	Now	Finished	09/12/2013 08:57:26	Completed (with Err
☐	707	Import: Basic	H:\My Documents\AAA_OpEasy 3.6\Basic Provisioning\ClearspanImportBasic_Marsh_Hawkes_RemoveoneUser.xlsm	Run Once	Finished	09/17/2013 10:30:50	Completed (with Err
☐	709	Import: Basic	H:\My Documents\AAA_OpEasy 3.6\Basic Provisioning\ClearspanImportBasic_Marsh_Hawkes_RemoveoneUser.xlsm	Run Once	Finished	09/17/2013 11:00:01	Completed (with Err
☐	883	Import: Basic	H:\My Documents\AAA_OpEasy 3.6\Basic Provisioning\ClearspanImportBasic_Add_1_User.xlsm	Run Once	Finished	09/19/2013 11:00:01	Completed
☐	887	Import: Basic	H:\My Documents\AAA_OpEasy 3.6\Basic Provisioning\ClearspanImportBasic_Remove_1_User.xlsm	Run Once	Finished	09/19/2013 12:00:02	Failed
☐	941	Import: Basic	H:\My Documents\AAA_OpEasy 3.6\Basic Provisioning\ClearspanImportBasic_Add_1_User.xlsm	Run Once	Waiting to Start (Next Run: 09/20/2013 09:00:00)		
☐	943	Import: Basic	H:\My Documents\AAA_OpEasy 3.6\Basic Provisioning\ClearspanImportBasic_Remove_1_User.xlsm	Run Once	Waiting to Start (Next Run: 09/20/2013 09:10:00)		

- End of Scheduling Requests -

Figure 33 Worksheet Waiting to start a Run

The following example illustrates a worksheet that failed when it was processed.



Delete	Request ID	Task	Imported File / Exported Worksheets	Schedule	Request Status	Last Run Time	Last Run Results	...	Edit
☐	707	Import: Basic	H:\My Documents\AAA_OpEasy 3.6\Basic Provisioning\ClearspanImportBasic_Marsh_Hawkes_RemoveoneUser.xlsm	Run Once	Finished	09/17/2013 10:30:50	Completed (with Errors)	Results	Edit
☐	709	Import: Basic	H:\My Documents\AAA_OpEasy 3.6\Basic Provisioning\ClearspanImportBasic_Marsh_Hawkes_RemoveoneUser.xlsm	Run Once	Finished	09/17/2013 11:00:01	Completed (with Errors)	Results	Edit
☐	883	Import: Basic	H:\My Documents\AAA_OpEasy 3.6\Basic Provisioning\ClearspanImportBasic_Add_1_User.xlsm	Run Once	Finished	09/19/2013 11:00:01	Completed	Results	Edit
☐	887	Import: Basic	H:\My Documents\AAA_OpEasy 3.6\Basic Provisioning\ClearspanImportBasic_Remove_1_User.xlsm	Run Once	Finished	09/19/2013 12:00:02	Failed	Results	Edit

- End of Scheduling Requests -

Figure 34 Worksheet Run Failed

3. Click **Refresh** to bring the screen up to date.

> **Note:** 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.

4. Click on the **Results** link in the row of the schedule for which you would like to see the results. The Schedule Results: Import: Basic page displays as in Figure .

5. Click **OK** to return to the Scheduling page.

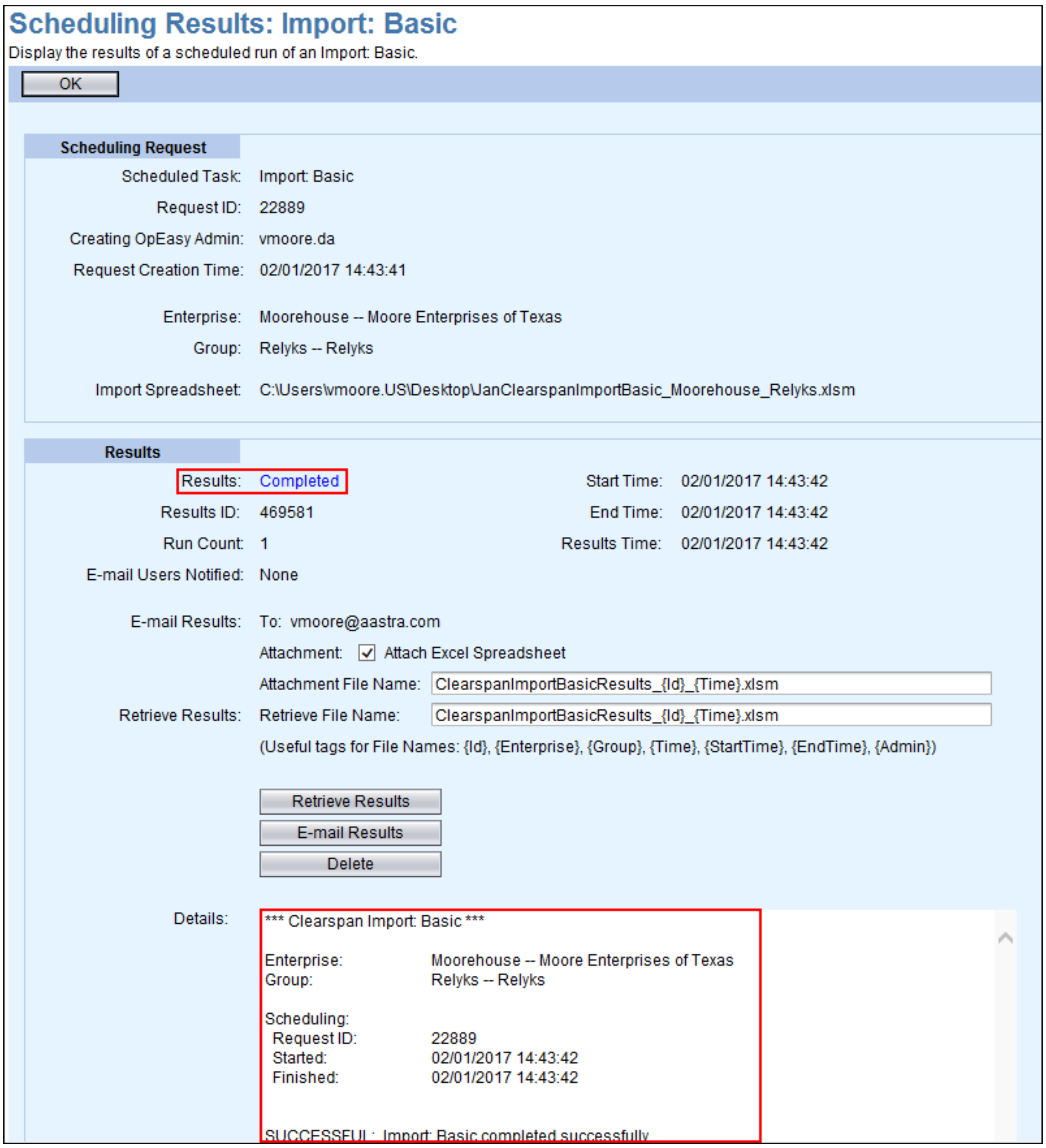


Figure 35 Scheduling Results – Basic Import

RESTARTING A SCHEDULED IMPORT

1. From the main menu, select **Provisioning** and then **Scheduling**.
2. Click on the **Edit** link in the row of the schedule you want to edit. The Scheduling Request: Import: Basic page displays. The spreadsheet is already chosen. The status is marked as "Finished".
3. Click **Restart Import**. The Import restarts.

DELETING A SCHEDULED IMPORT

1. From the main menu, select **Provisioning** and then **Scheduling**.
2. Check the **Delete** box next to the schedule(s) to delete.
3. Click **OK**. The schedule(s) are deleted from the list.

BASIC IMPORT CHANGES

OpEasy 4.9 to 4.10 Changes (B226)

- None

OpEasy 4.7 to 4.9 Changes (B226)

- None

OpEasy 4.6 to 4.7 Changes

- None

OpEasy 4.5 to 4.6 Changes

- None

OpEasy 4.4 to 4.5 Changes

- None

OpEasy 4.3 to 4.4 Changes

- In the **Phone Number** column, formatted the phone number as xxx-xxx-xxxx, instead of the previous (xxx)xxx-xxxx. This formatting change aligns with how OpEasy UI displays phone numbers.
- The physical location of the phone (**Physical Location** column) is no longer required.