Clearspan® OpEasy®
Advanced Provisioning Guide

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NOTICE

TRADEMARKS

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Release #4.9 –January 2018

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OVERVIEW

OpEasy is a tool that helps an administrator quickly and easily bring up a Mitel or Polycom phone device within an Enterprise on the Clearspan platform, ready to use 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 that is loaded onto the phone when it starts up. The configuration file defines the lines and features that are enabled on the phone. This file is generated and stored on the Clearspan system, but OpEasy controls the content of the 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 on the following functions, which are generally available to Group Administrators (GA), Enterprise Administrators (EAs), and above:

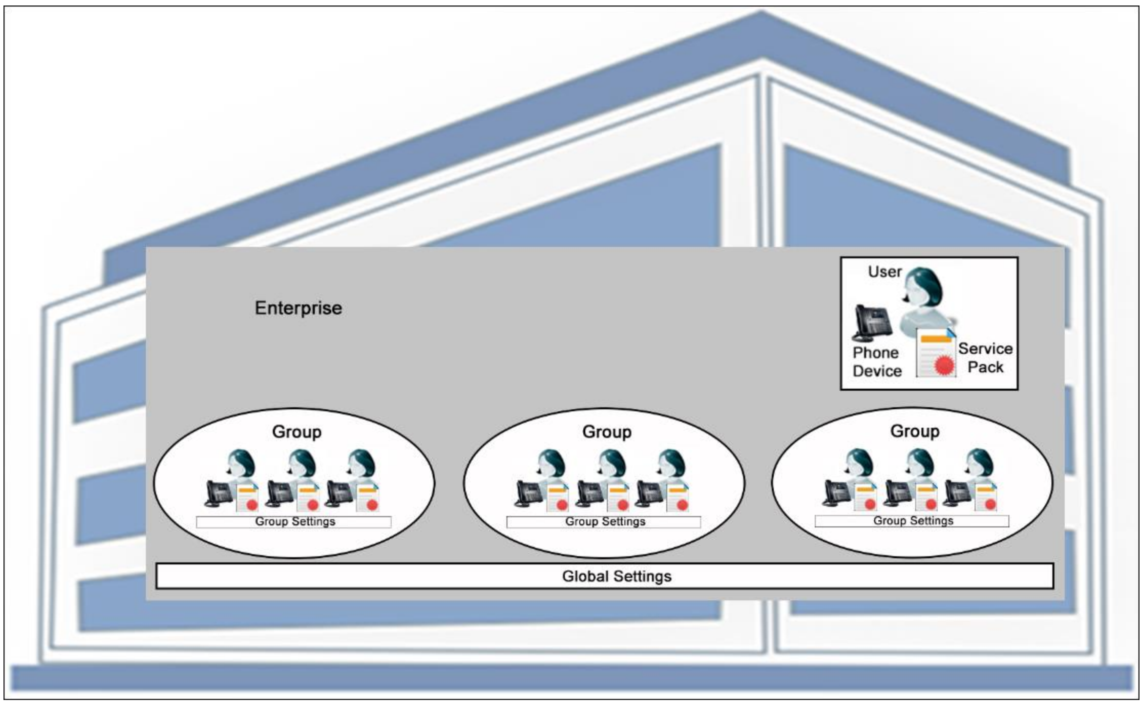
- Users–Add, Modify, Delete, or Search for Users.
- Virtual Users–Add a new virtual user or search for virtual users to edit or delete, including Auto Attendants and Hunt Groups.
- Import–Use spreadsheets to create users and user features.
- Export–Export Clearspan data to a spreadsheet.
- Phone Management–Add, Modify, Delete, or Search for Phone devices. A list of devices can be exported to a spreadsheet. Devices must be created before creating User Profiles.
- 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 generally available to Department Administrators (DAs) such as adding, modifying, and removing users are covered in the *Clearspan OpEasy Basic Provisioning Guide.*

INITIAL SYSTEM-LEVEL SETUP

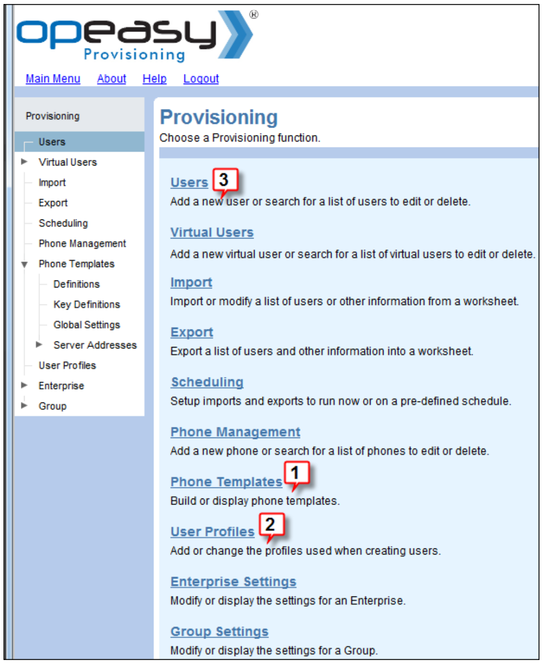
Using the customer's requirements for features and functionality, OpEasy comes set up with an Enterprise, one or more Groups within the Enterprise, Global Settings, and Service Packs to be used across the Enterprise. An *Enterprise* is the highest level organization in OpEasy, typically representing 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. Mitel 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.

Mitel 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 must be 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, refer to the Phone Templates section on page 6.

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 such information as which phone template to use, which Service Packs to assign, what phone number to assign, Voice Mail settings to use, and so on. For more information, refer to the User Profiles section on page 56.

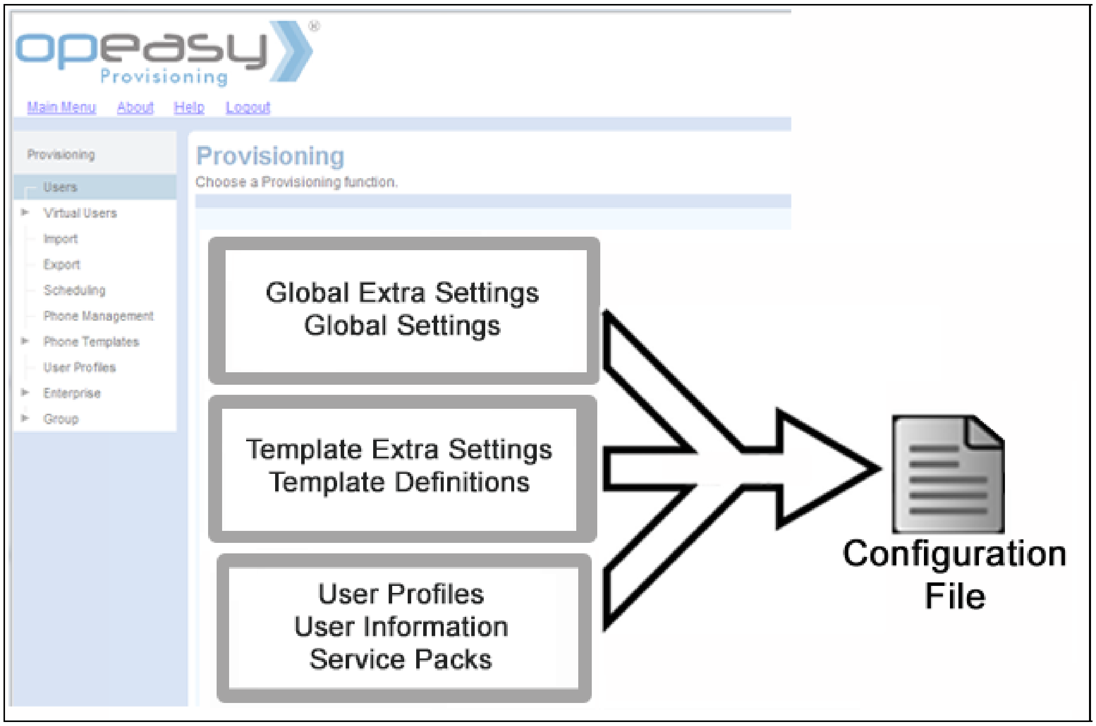
3. Create a User in OpEasy for each person who will be using a phone. User information includes first and last name, Email, passwords, phone numbers, phone assignments, location, optional services configuration, and so on. Choosing a User Profile when creating a User simplifies the configuration requirements by automatically filling in many of the details. For more information, refer to the Users section on page 66.

   OpEasy allows you to create a primary Phone Device for a User as part of creating the User. 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, refer to the Import section on page 134.

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.

5. OpEasy also generates a phone configuration file based on device, profile, template, and user information. For more information about how these settings are combined, refer to the Viewing or Editing Global Settings section on page 30.



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 device credentials depending on the device type, in order to apply the appropriate configuration file. For more information, refer to the Set Up a New Phone for a New User section on page 174.

7. The phone is ready to use.

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. Templates are edited, deleted, or copied using the Provisioning application of OpEasy. 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.

Templates must be built before Phone Management, User Profiles, and Users. Building a phone template consists of 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.

POLYCOM PHONE SUPPORT

You can use OpEasy to configure certain Polycom phones when the Polycom Phone Support 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/phone type, depending upon the needs of an organization.

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 displays.

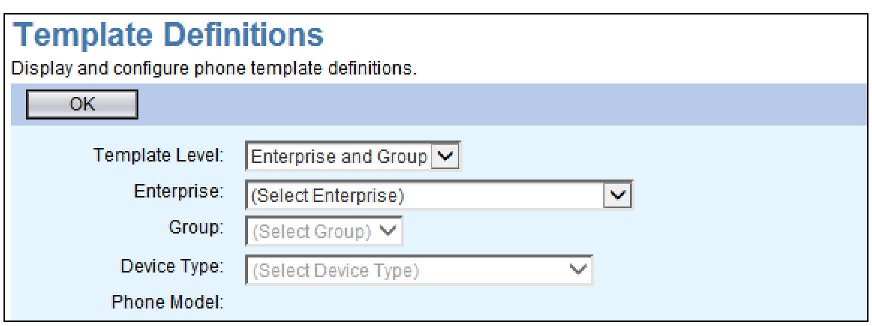


Figure 1 Template Definitions Page

3. Choose the **Template Level** from the drop-down list.
4. Select the **Enterprise** and **Group** from the 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 choose the device type, the remaining part of the page displays.

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, etc. The Key Definitions page allows you to add additional feature keys to the default list that will be used when building phone templates. All of 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, etc. 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 Mitel 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-Wide)** to view key definitions for all Enterprises in the system.
4. Select the **Phone Manufacturer**, if necessary. The available manufacturers depend on the device types configured for the Enterprise. The Key Definitions page displays, as shown in the following figure.

Type	Label	Value	Idle	Connect	Incoming	Outgoing	Busy	Delete
Auto Call Distribution	ACD		☑	☑	☑	☑	☑	Delete
BLF/List	BLF List	list uri: %BWBLF-URI-1%	☑	☑	☑	☑	☑	Delete
Call Forward	Call Forward		☑	☑	☑	☑	☑	Delete
XML	Call Log	http://%CS_EMS_SERVER%/calllog.p	☑	☑	☑	☑	☑	Delete
Speeddial	Call Park	%BWFAC-CALL-PARK-1%	☑	☑	☑	☑	☑	Delete
Speeddial	Call Pickup	%BWFAC-CALL-PICKUP-1%	☑	☑	☑	☑	☑	Delete
Speeddial	Call Pull	%BWFAC-DIRECTED-CALL-PICKUP	☑	☑	☑	☑	☑	Delete
Speeddial	Call Return	%BWFAC-CALL-RETURN-1%	☑	☑	☑	☑	☑	Delete
Callers	Callers		☑	☑	☑	☑	☑	Delete
Speeddial	CLID Block	%BWFAC-CLID-DELIVERY-BLOCKIN	☑	☑	☑	☑	☑	Delete
Conference	Conf		☐	☑	☑	☑	☑	Delete
Speeddial	COT	%BWFAC-COT-1%	☑	☑	☑	☑	☑	Delete
Speeddial	Dir Call P/U	%BWFAC-DIRECTED-CALL-PICKUP	☑	☑	☑	☑	☑	Delete
Speeddial	Dir VM Txfr	%BWFAC-DIRECT-VM-TRANSFER-1	☑	☑	☑	☑	☑	Delete
Do Not Disturb	DND		☑	☑	☑	☑	☑	Delete
Do Not Disturb	FW2NightGrp		☑	☑	☑	☑	☑	Delete
XML	LDAP Lookup	http://%CS_EMS_SERVER%/ad.php	☑	☑	☑	☑	☑	Delete
Line	Line		☑	☑	☑	☑	☑	Delete
Phone Lock	Lock		☑	☑	☑	☑	☑	Delete
XML	Outlook	http://%CS_EMS_SERVER%/outlook.	☑	☑	☑	☑	☑	Delete
Speeddial	Park Rtrv	%BWFAC-CALL-PARK-RETRIEVE-1%	☑	☑	☑	☑	☑	Delete
Phone Lock	Phone Lock		☑	☑	☑	☑	☑	Delete
XML	RSS Feed	http://%CS_EMS_SERVER%/rss.php	☑	☑	☑	☑	☑	Delete
Services	Services		☑	☑	☑	☑	☑	Delete
Speeddial	Shar	818005551234	☑	☑	☑	☑	☑	Delete
XML	Speed 100	http://%CS_EMS_SERVER%/cs.php?	☑	☑	☑	☑	☑	Delete
XML	Speed 8	http://%CS_EMS_SERVER%/cs.php?	☑	☑	☑	☑	☑	Delete
Speeddial	Voice Mail	%BWFAC-VOICE-PORTAL-ACCESS-	☑	☑	☑	☑	☑	Delete
- End of Definitions -								

Figure 2 Key Definitions Page Part 2 – Keys Portion

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

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

Phone Lock	Lock		☑	☑	☑	☑	☑	Delete
XML	Outlook	http://%CS_EMS_SERVER%/outlook.	☑	☑	☑	☑	☑	Delete
Speeddial	Park Rtrv	%BWFAC-CALL-PARK-RETRIEVE-1%	☑	☑	☑	☑	☑	Delete
Phone Lock	Phone Lock		☑	☑	☑	☑	☑	Delete
XML	RSS Feed	http://%CS_EMS_SERVER%/rss.php	☑	☑	☑	☑	☑	Delete
Services	Services		☑	☑	☑	☑	☑	Delete
XML	Speed 100	http://%CS_EMS_SERVER%/cs.php?	☑	☑	☑	☑	☑	Delete
XML	Speed 8	http://%CS_EMS_SERVER%/cs.php?	☑	☑	☑	☑	☑	Delete
Speeddial	Voice Mail	%BWFAC-VOICE-PORTAL-ACCESS-	☑	☑	☑	☑	☑	Delete
None			☐	☐	☐	☐	☐	Delete
- End of Definitions -								

Figure 3 Key Definition Row Added

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

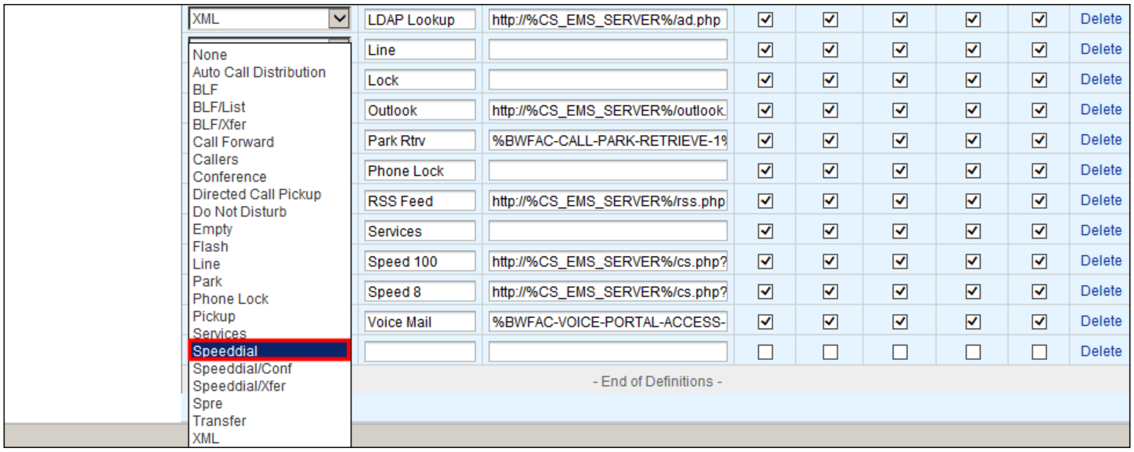


Figure 4 Key Definitions – Key Type Drop-Down List

7. Enter a **Label** for the key. Key labels are a maximum of 12 characters.

8. 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, etc. This information should be provided by the system administrator.

9. Check the phone states defining when this key will display on the phone. All states are unchecked by default.

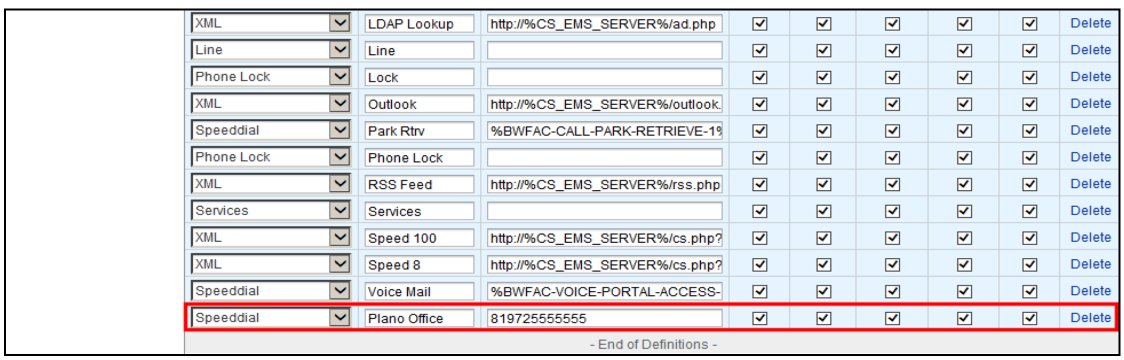


Figure 5 Key Definitions – Added Speed dial

10. Click **OK** or **Apply**.

11. 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**.

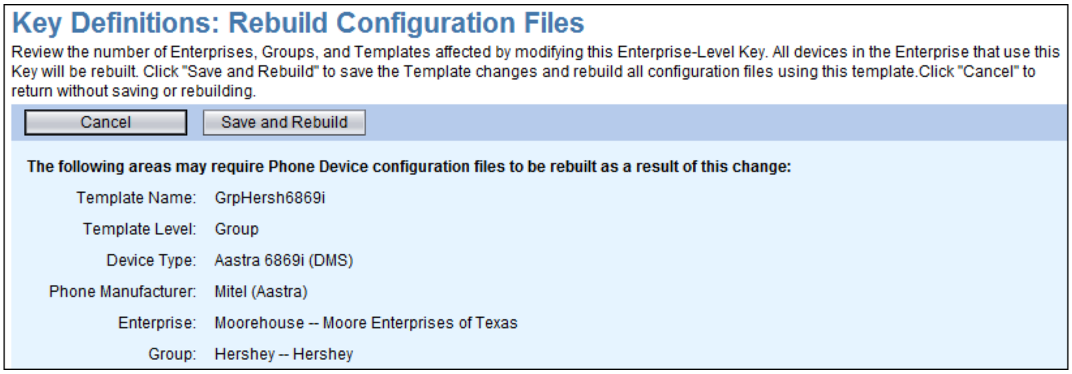


Figure 6 Key Definitions: Rebuild Configuration Files Page

12. 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 displays.
3. Select an **Enterprise** to remove a key definition at the Enterprise level only, or select **(System-Wide)** to remove a key definition for the system.
4. Click **Delete** on the far right side of the row of the key to delete.

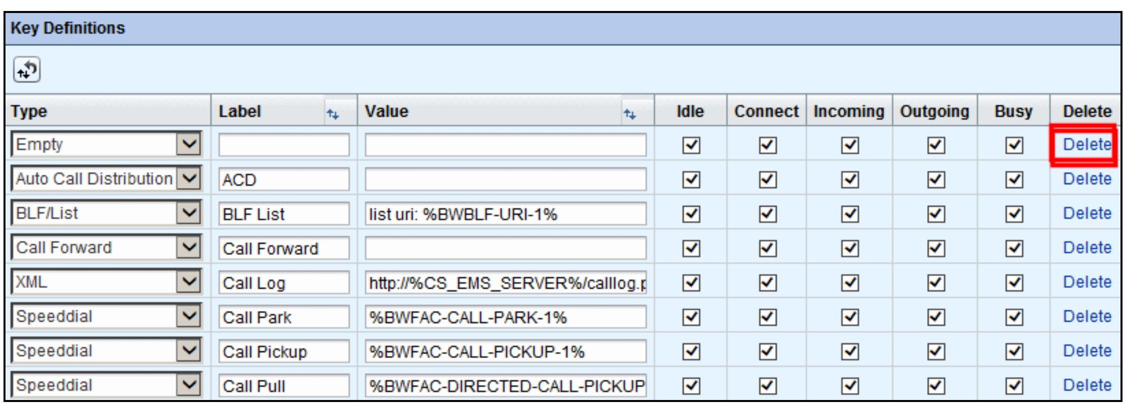


Figure 7 Key Definitions – Delete

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 displays.

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 displays.
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** and **New Template Level**.
6. Enter the name of the template in the **New Template Name** text box. In the following example, the new template will be assigned to phones in the Support area.

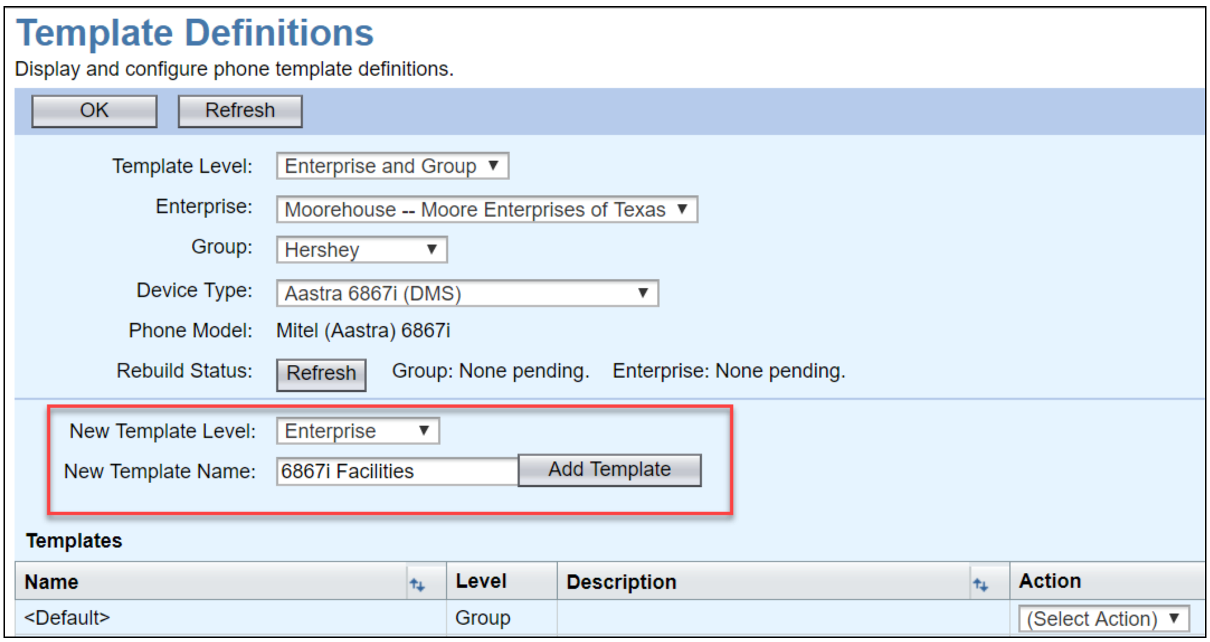


Figure 8 Enter New Template Name

7. Click **Add Template** as shown in the example. The Template Add page displays. The General tab displays by default.
8. 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. 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.

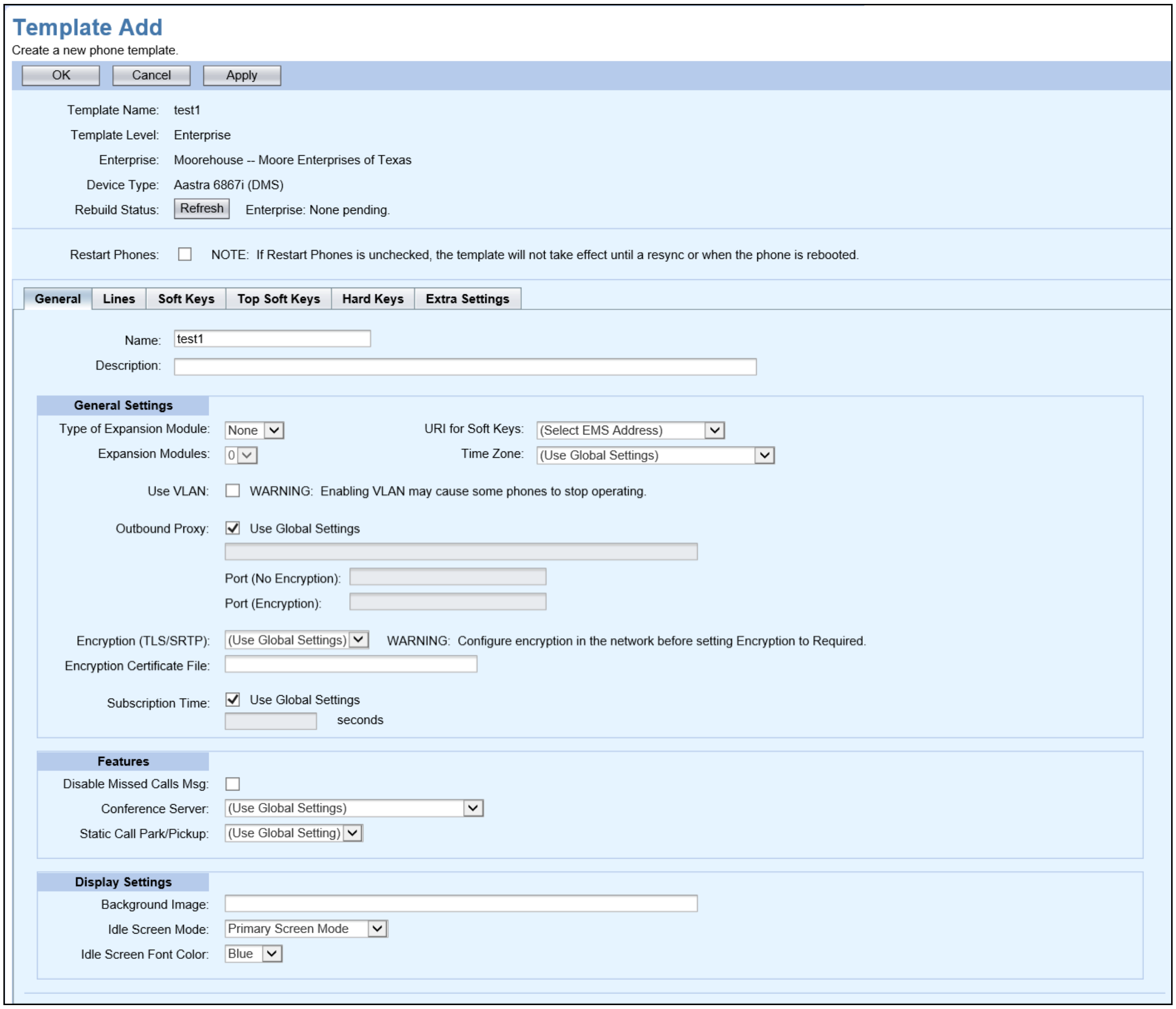


Figure 9 Template Add Page

3. If an expansion module will be 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.

4. 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.

5. Select **Use VLAN** to add support for configuring phones to use their VLAN capability.

6. Enter the **Outbound Proxy Address** and **Outbound Proxy Port** used by this phone. These optional fields can contain text up to 256 characters, as well as tags.

7. 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 only 6863i, 6865i, 6867i, 6869i, and 6873i phone models.

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.

8. Use Global Settings for subscription time, or uncheck the **Use Global Settings** check box and enter the subscription time in seconds.
9. Select **Disable Missed Calls Message** to disable the Missed Calls message from displaying on Mitel (Aastra) phones.
10. Select **Conference Server Enable** if you want to use centralized conferencing with a SIP phone.
11. 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.

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

12. 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 field. This setting applies to only the 6867i, 6869i, and 6873i phones. The requirements for the file are as follows:
    - 320x240 pixels (6867i)
    - 480x272 pixels (6869i)
    - 800x480 pixels (6873i)
    - 24 or 32-bit color depth
    - 1MB maximum file size
    - JPG and PNG are supported
    - There should be no frame around the image
13. Set the **Idle Screen Font Color** to control the font color used on the idle screen of the phone. This setting applies to only the 6867i, 6869i, and 6873i phones. The options are Blue (Default setting for System level), White, or Black.
14. 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.

Assigning Lines

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 desired 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.

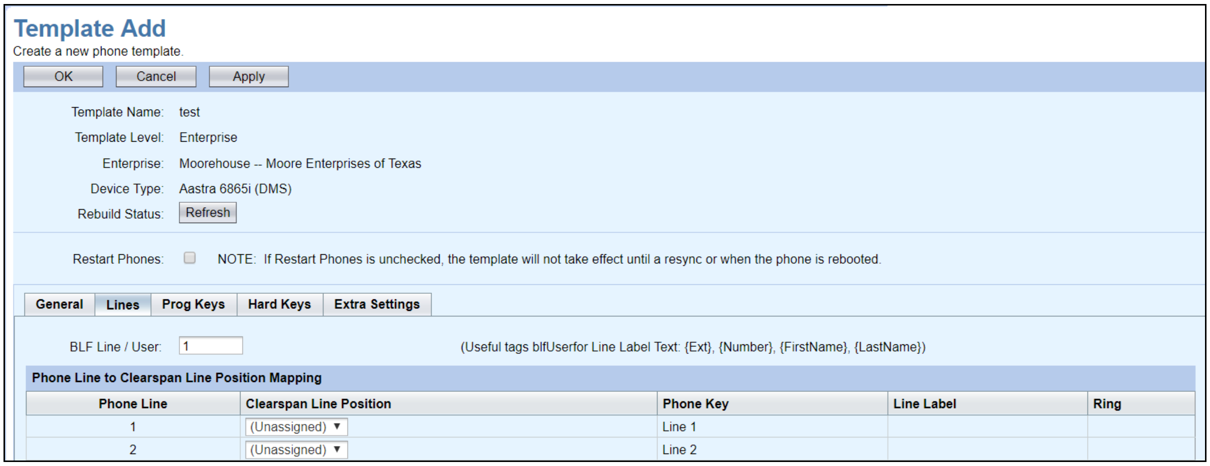


Figure 10 Phone Line to Clearspan Line Position Mapping

4. 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}”.
5. 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.
6. Repeat these steps for every line on the phone that you wish 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

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 placed physically higher on the phone.

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

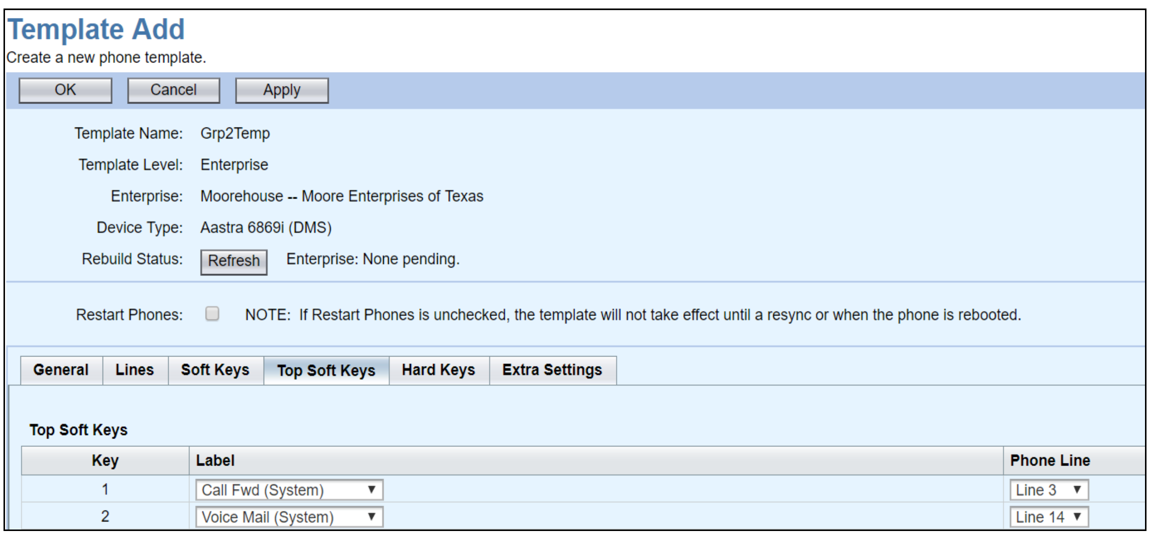


Figure 11 Template Add – Soft Keys Tab

2. Select a feature or line from the **Label** drop-down list for Key 1. This drop-down list of features comes from the list of Key Definitions.
3. Choose a **Phone Line** for the key if presented; some features such as Do Not Disturb are not tied to a specific phone line.

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 displays. The number of lines and keys depends on the phone. For Mitel (Aastra) phones that support reprogrammable hard keys, the Hard Keys section displays the functions for keys that can be reassigned.

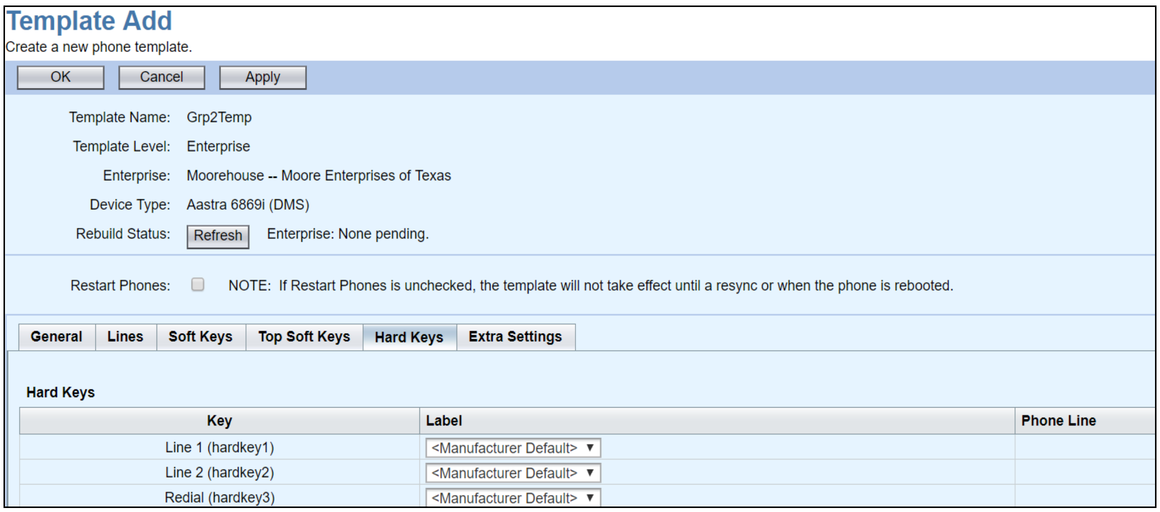


Figure 12 Template Add – Hard Keys Tab

5. 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.

6. Choose a **Phone Line** for the key.

7. Continue configuring the keys until you have assigned all the features desired to the hard keys in the template.

Configuring MiVoice Conference Phone Applications

Templates for the Mitel MiVoice Conference Phone (UC360 Collaboration Point) include an Applications tab. Check the box next to 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

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.

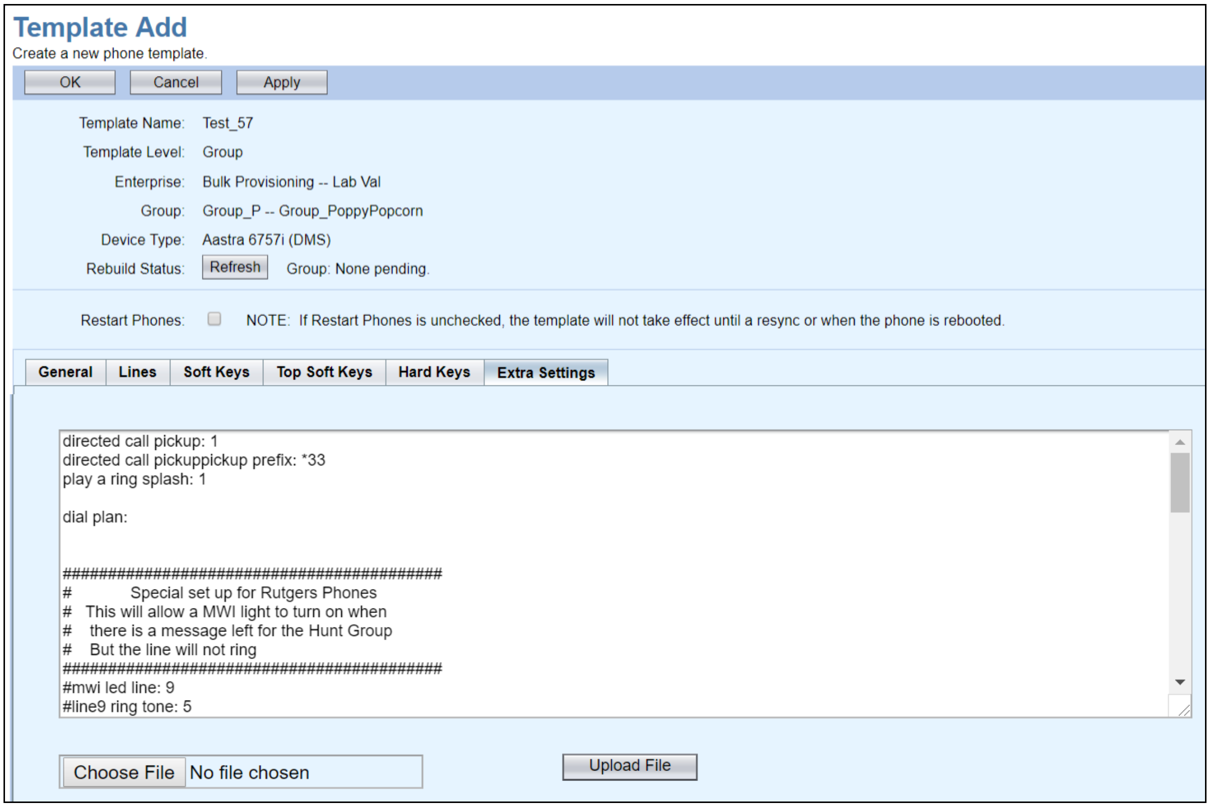


Figure 13 Template Extra Settings Tab

2. Click **Browse** to choose a configuration settings file that was previously created, if necessary, and use the **Upload File** button to get 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.

EDITING 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 displays.
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 displays.
7. For the template you want to edit, click on the **Edit** link in the **Action** drop-down list at the end of the row. The Template Edit page displays.
8. Follow the procedures in the *Creating a New Phone Template* section to make any changes on the Template Edit tabs.
9. Select the **Template Users** tab to search for users or devices that use this template.

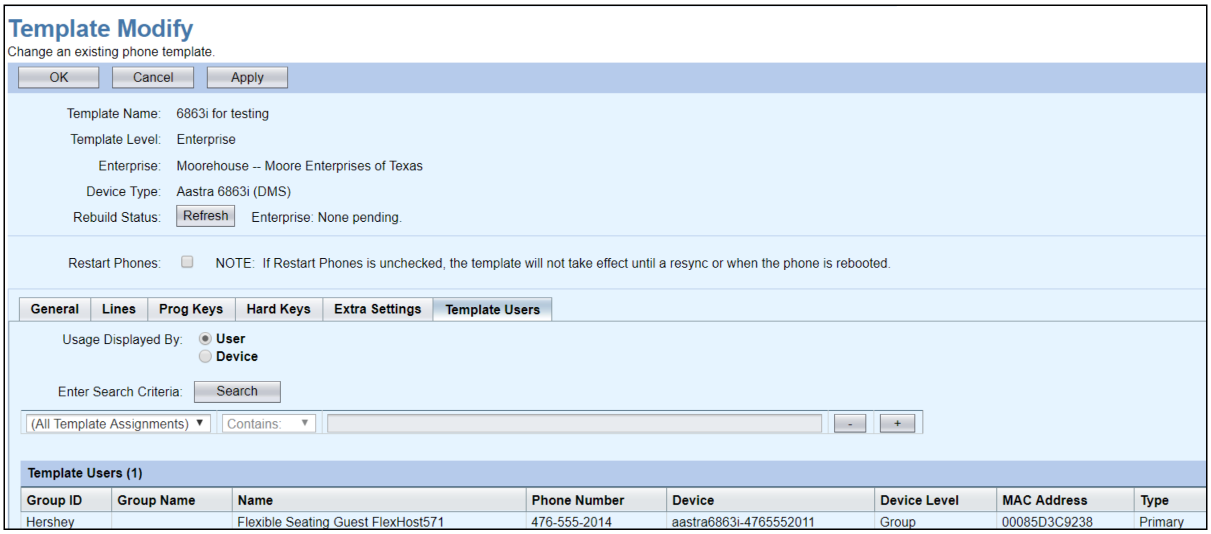


Figure 14 Template Users Tab

10. Click **OK** or **Apply**.
11. 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**.

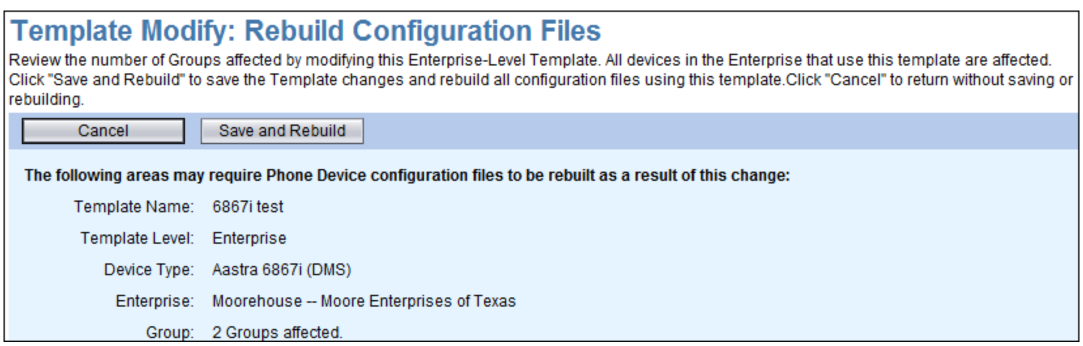


Figure 15 Template Modify: Rebuild Configuration Files Page

Rebuild Status is shown on the Template pages and 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 displays.

3. Select **Edit** from the **Select Action** drop-down list.
4. Select the **Template Users** tab.
5. Select **Templates Displayed By** to see the users or devices that use the template.
6. You can use search criteria to filter the list, or you can click **Search** to view the full list.

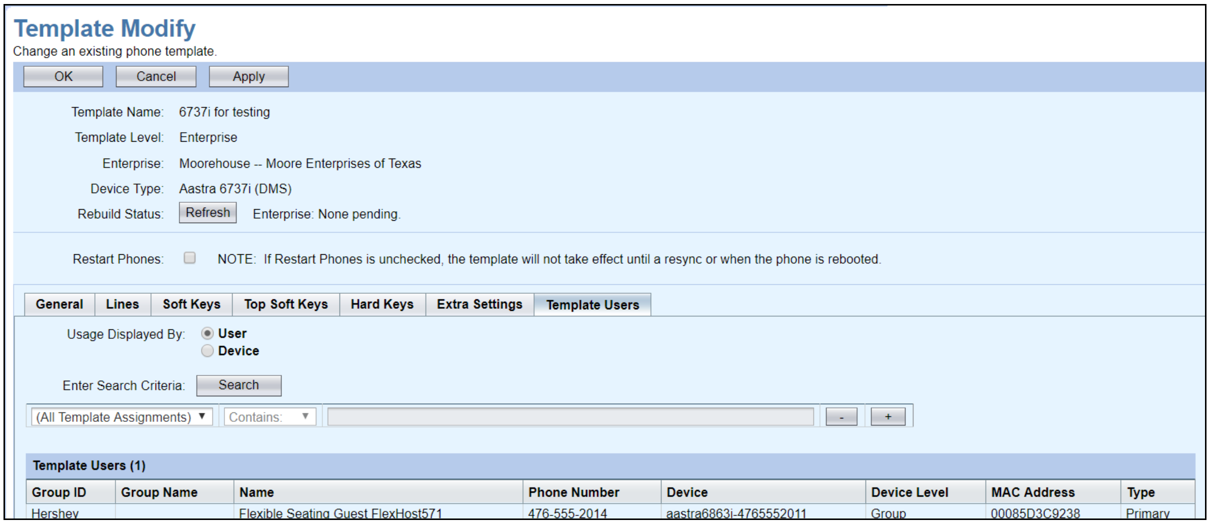


Figure 16 Searching for Template Usage

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 displays.
3. Select **Edit** from the **Select Action** drop-down list.
4. Change the **Name** on the Template Modify page.

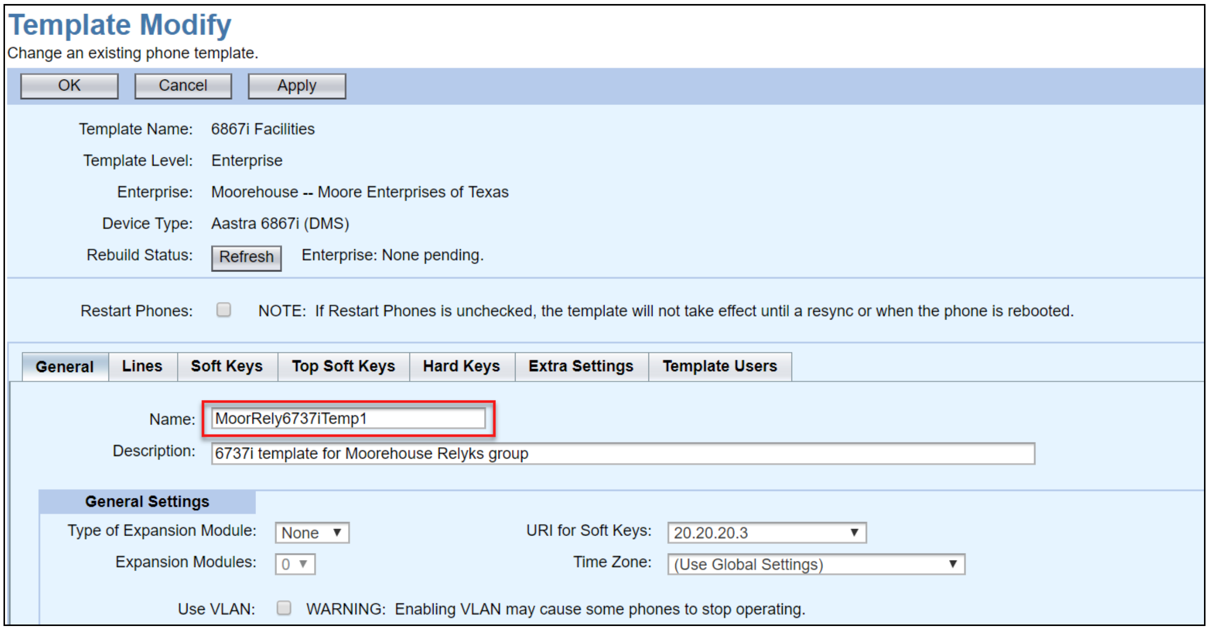


Figure 17 Renaming a Template

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.

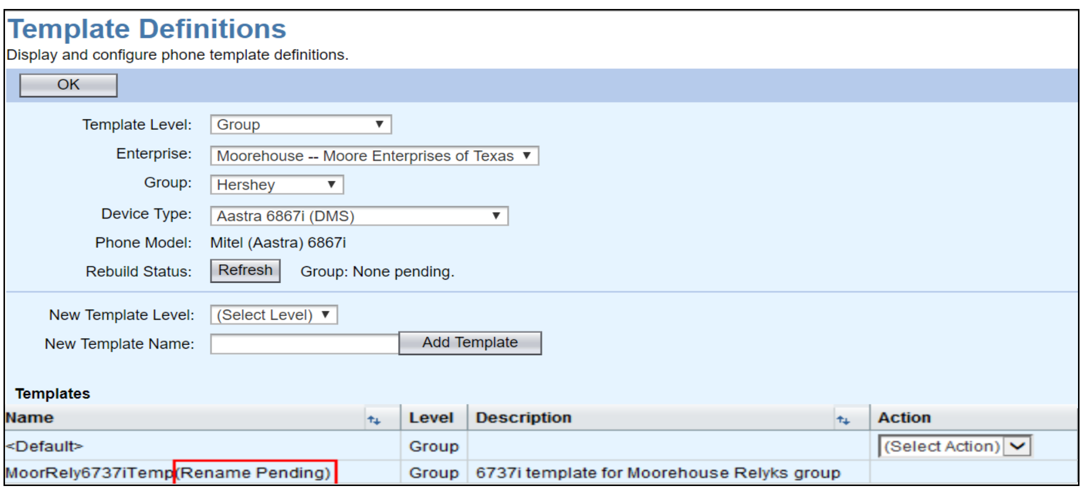


Figure 18 Template Rename Pending

The search for template usage may take several minutes. Refresh the page to see 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.

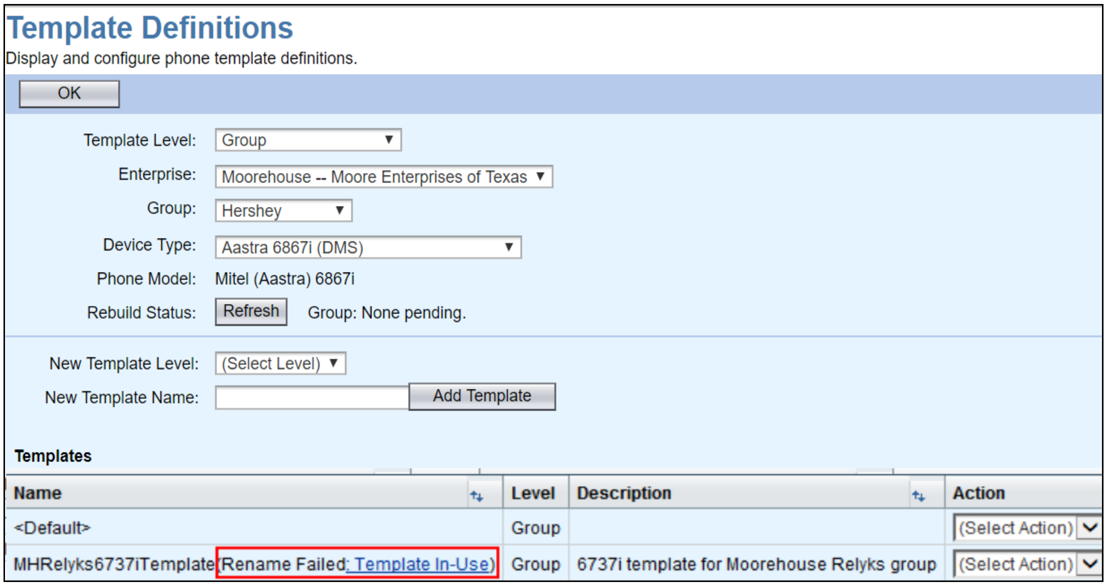


Figure 19 Template Rename Failed: Template In Use

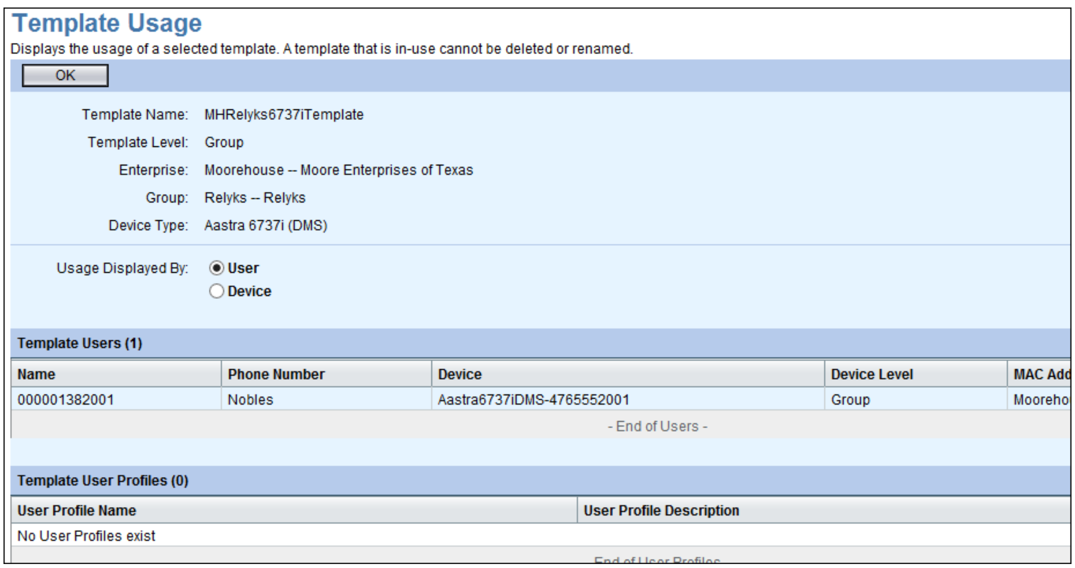


Figure 20 Template Usage Page

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 (whether or not 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 displays.
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 displays.
7. For the template you want to copy, click on the **Copy** link in the **Action** drop-down list at the end of the row. The Template Copy page displays.

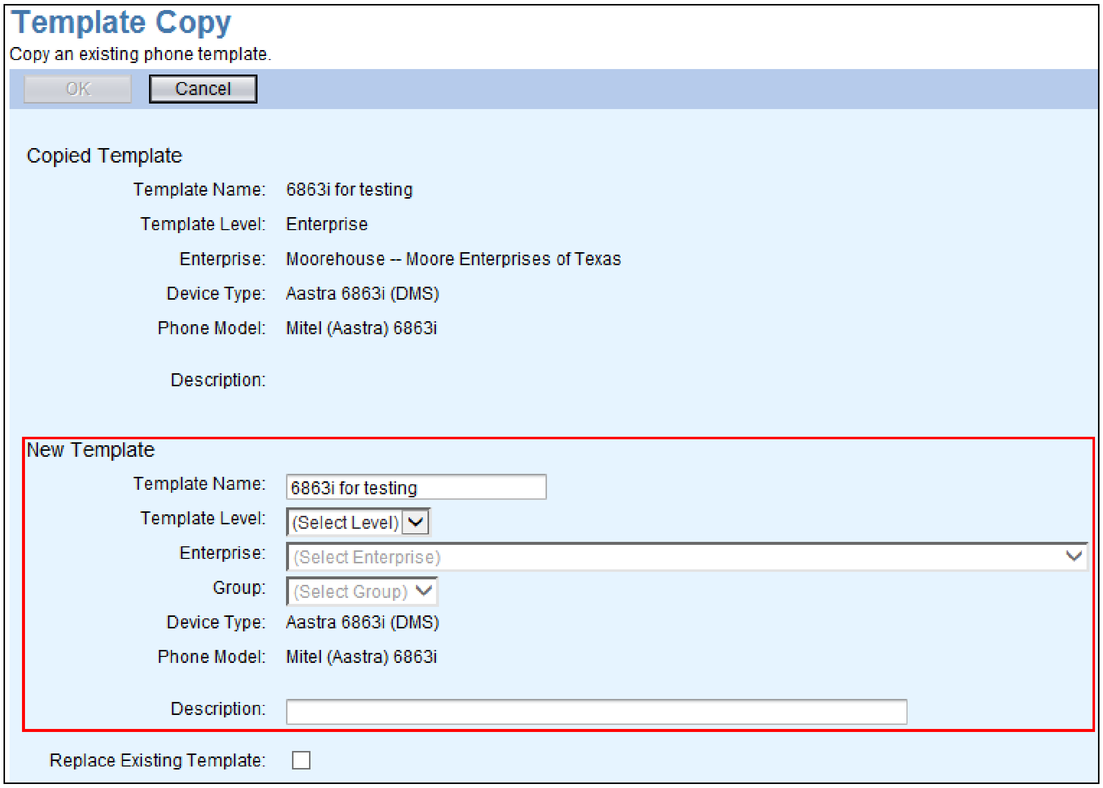


Figure 21 Template Copy Page – New Template Section

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 displays and the copied template appears in the list.

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 displays.

3. Select **Delete** from the **Select Action** drop-down list as shown in the following example.

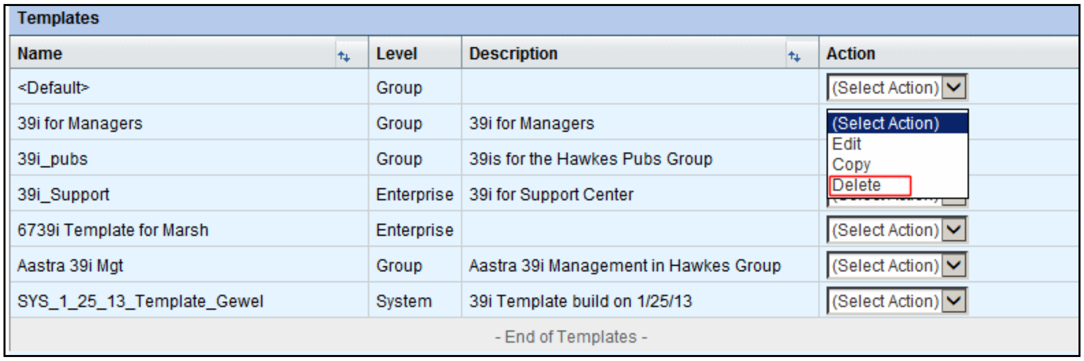


Figure 22 Template Selected to Delete

4. Click **Delete** on the Template Delete page. A confirmation dialog displays.

5. Click **OK**. The template is marked for deletion with "(Delete Pending)" next to 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.

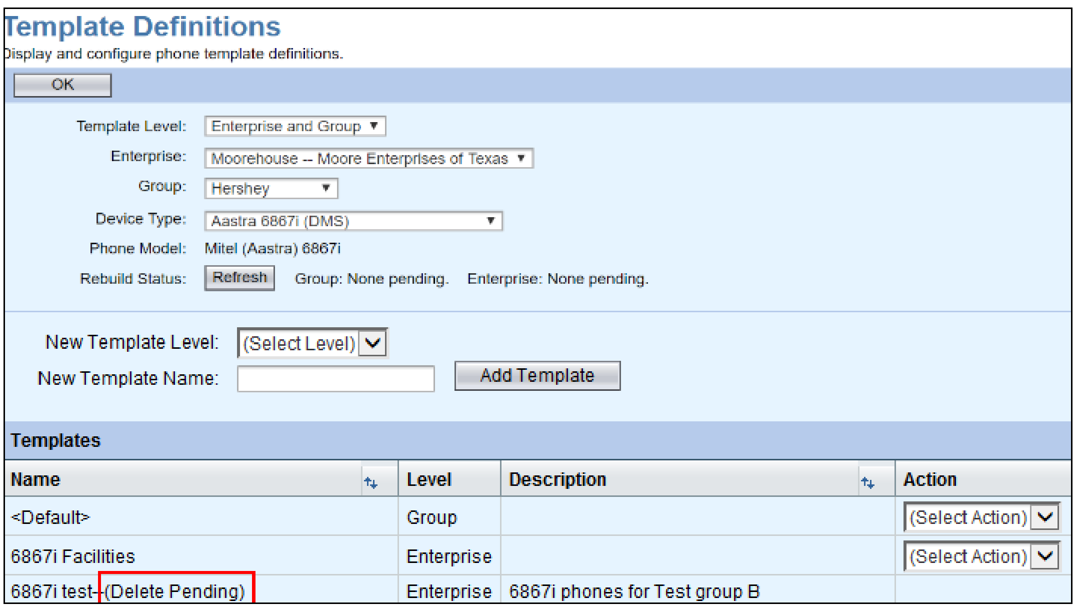


Figure 23 Template Delete Pending

The search for template usage may take several minutes. Refresh the page to see 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 next to the template name, with a link to the Template Usage page.

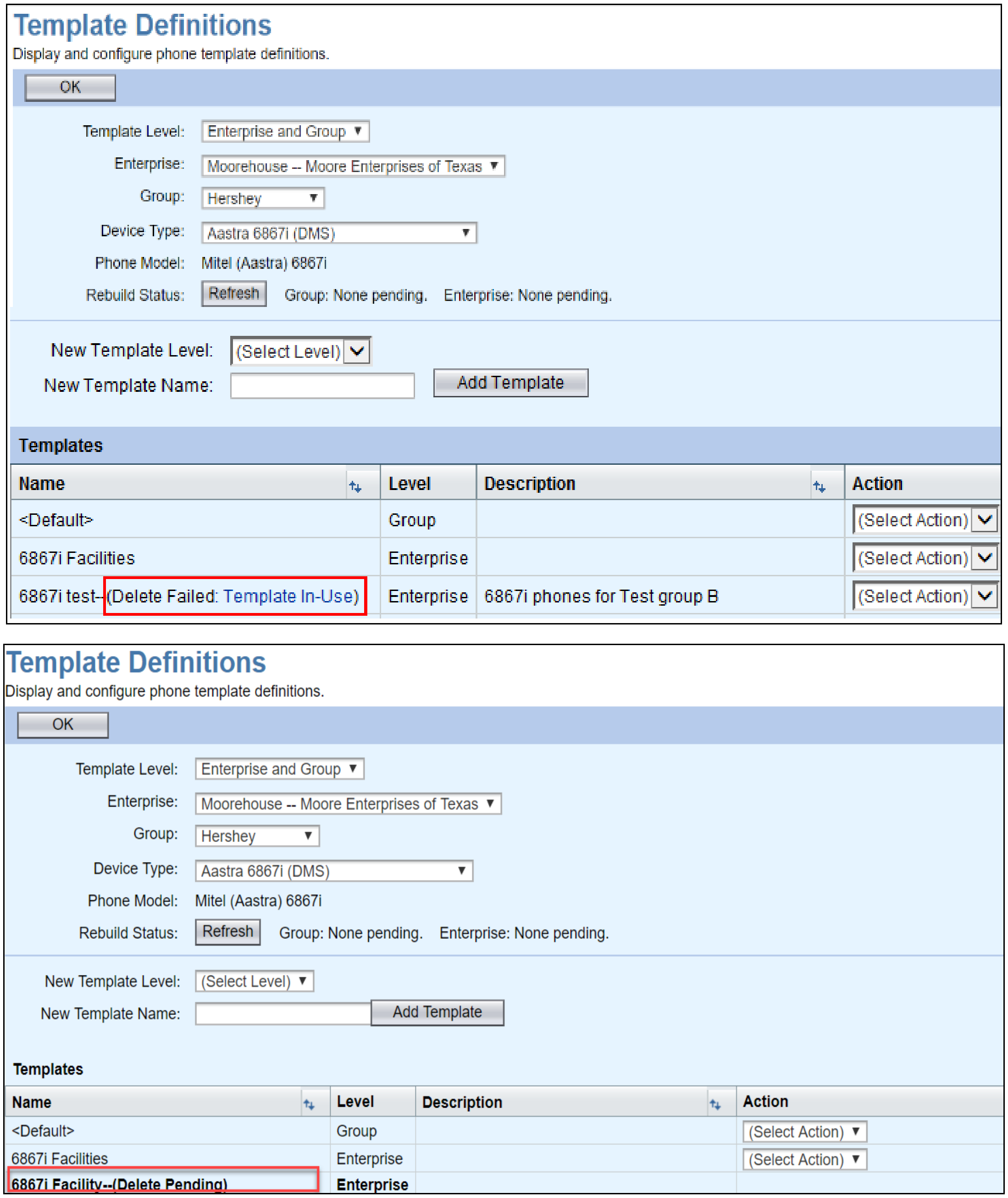


Figure 24 Template Delete Failed: Template In Use

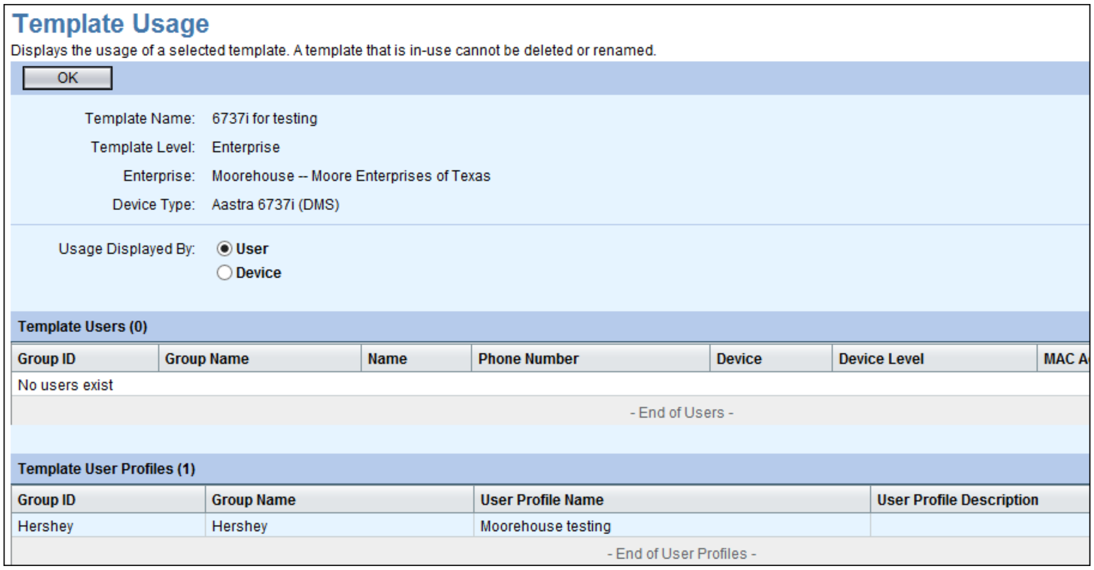


Figure 25 Template Usage Page

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 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 displays.
3. Select a **Template Level** from the drop-down list.
4. Select the **Enterprise** and **Group**, if necessary.
5. Select the **Device Type**,
    - For Clearspan Communicator for iOS or Android clients, choose **Business Communicator – Mobile**.
    - For Clearspan Communicator for Desktop, choose **Business Communicator – PC**.
    - For Clearspan Communicator for Desktop, Skype Add-In, choose **Business Communicator – S4B**.
    - For Clearspan Communicator for iOS tablets, choose **Business Communicator – 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 displays. The General tab displays by default.

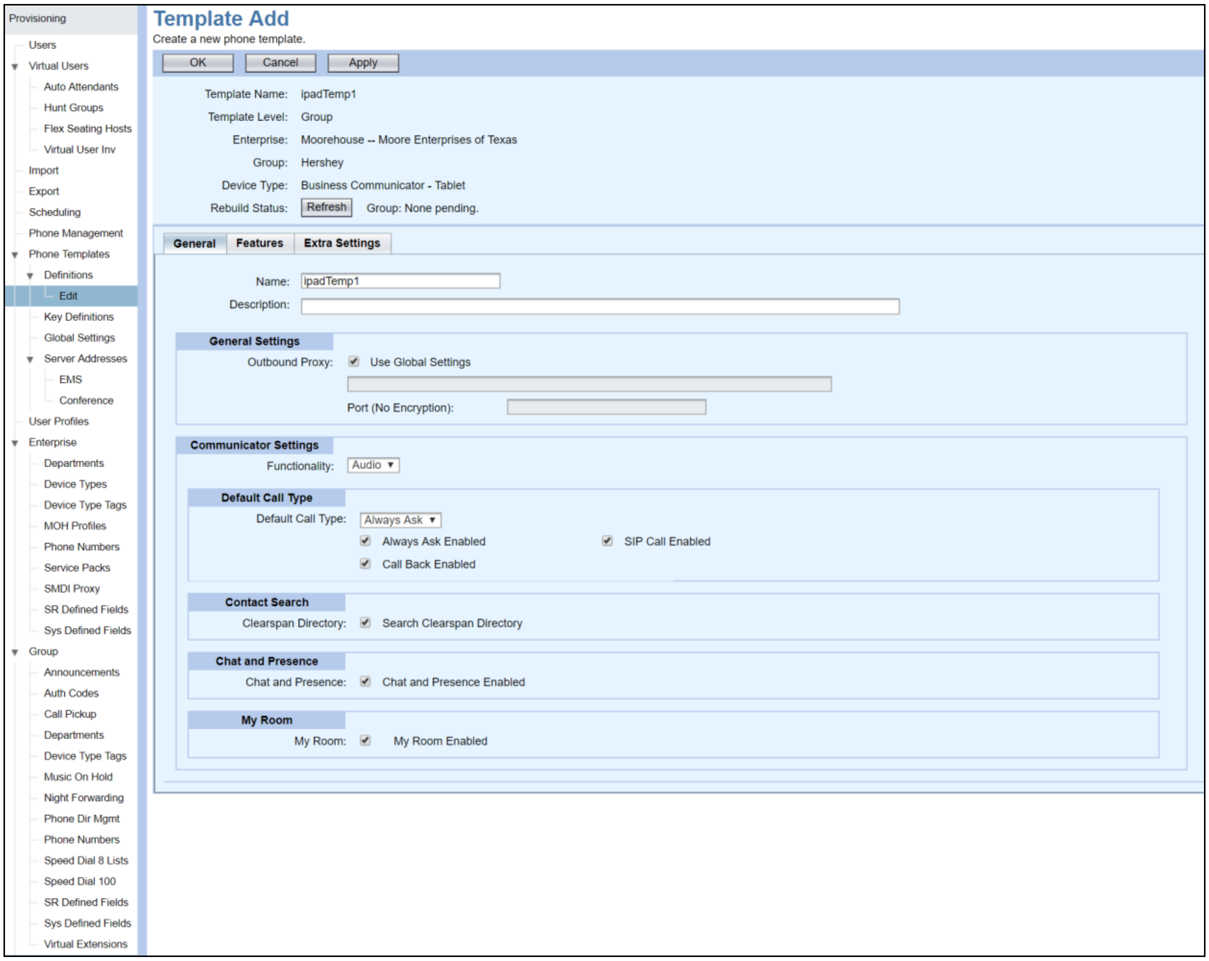


Figure 26 Template Add – General for Clearspan Communicator

9. Configure Communicator Settings on the General tab.

Choose to **Use Global Settings**, or enter the **Outbound Proxy** and **Outbound Proxy Port** used by this client. These optional fields can contain text up to 256 characters, as well as tags.

For Clearspan Communicator for Desktop and Clearspan Communicator for Desktop, Skype Add-In, choose to **Use Global Settings**, or enter the Outbound Proxy and the 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 a phone device used by this client. These optional fields can contain text up to 256 characters, as well as tags.

Outbound Proxy Discovery Domain Override is optional and defines an alternate domain to use during SRV record lookup.

10. Select the **Encryption (TLS/SRTP)** setting. Encryption is only available for PC Desktop and S4B Communicator clients.

11. 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
- Business Communicator – Tablet: Basic, Audio, or Video

12. On the **Features** tab, select the features to enable for the client. Refer to the *Clearspan Communicator User Guide* for more information about these settings and features.

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

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

15. 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 displays.

3. Select a **Template Level** from the drop-down list.

4. Select the **Enterprise** and **Group**, if necessary.

5. For the **Device Type**, choose the AudioCodes device.

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 displays. The General tab displays by default.

On the General tab:

9. Enter a **Name** and **Description** of the template as shown in the following figure.

10. Select the **Time Zone** from the drop-down list.

11. Select the **Audiocodes Settings** that you want to enable.

- **Survivable Mode**: Enables the AudioCodes device for survivability. When this box is checked, Stand-Alone Survivability is enabled using the configuration information in the AudioCodes Global Settings.
- **3-Way Conference**: Enables 3-way conferencing. Choose the configured conference server from the **Conference Server** drop down box 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 checked, Voice Quality Monitoring is enabled using the configuration information in the AudioCodes Global Settings.

12. Depending on the device model, enter the **Proxy**, **Proxy Port**, and **Backup Proxy values** used by this device. These optional fields can contain text up to 256 characters, as well as tags.

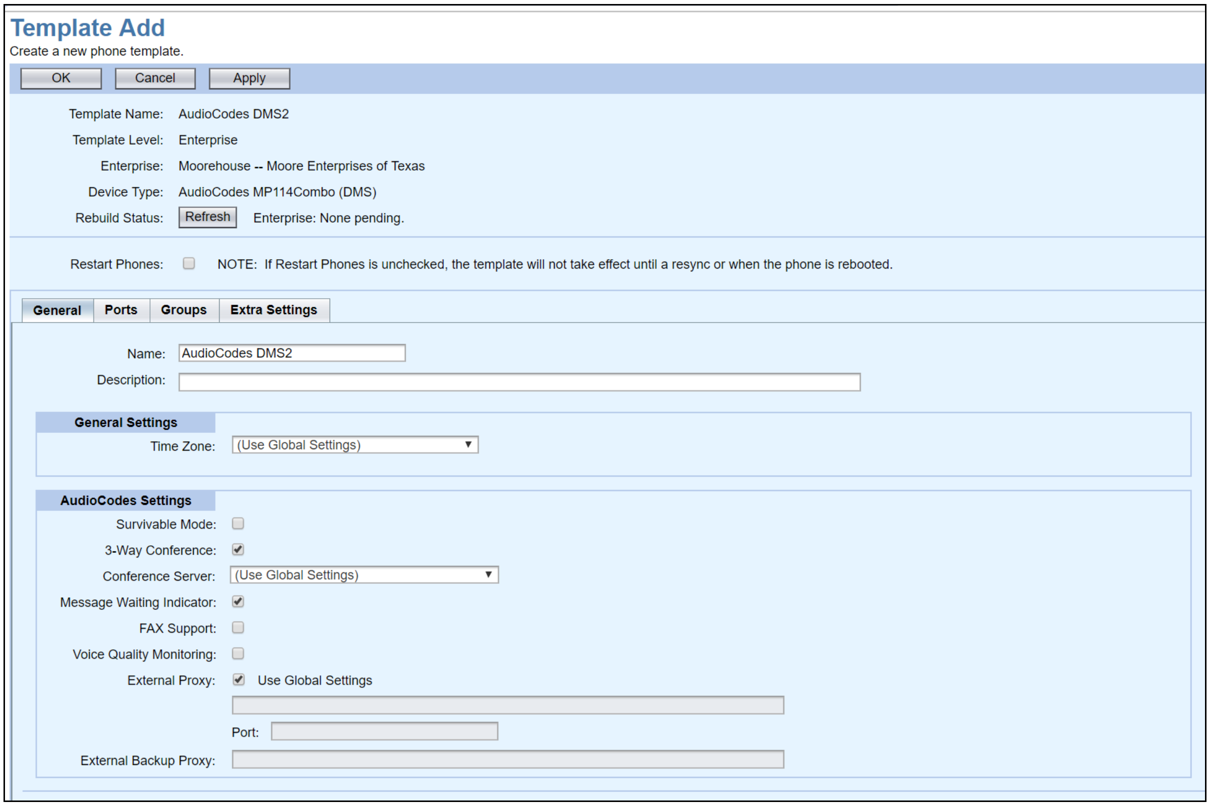


Figure 27 Template Add – General for AudioCodes

13. If a Ports tab appears for your device model, 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.

14. Select whether **Call Waiting** and **Caller ID** are enabled on the port.

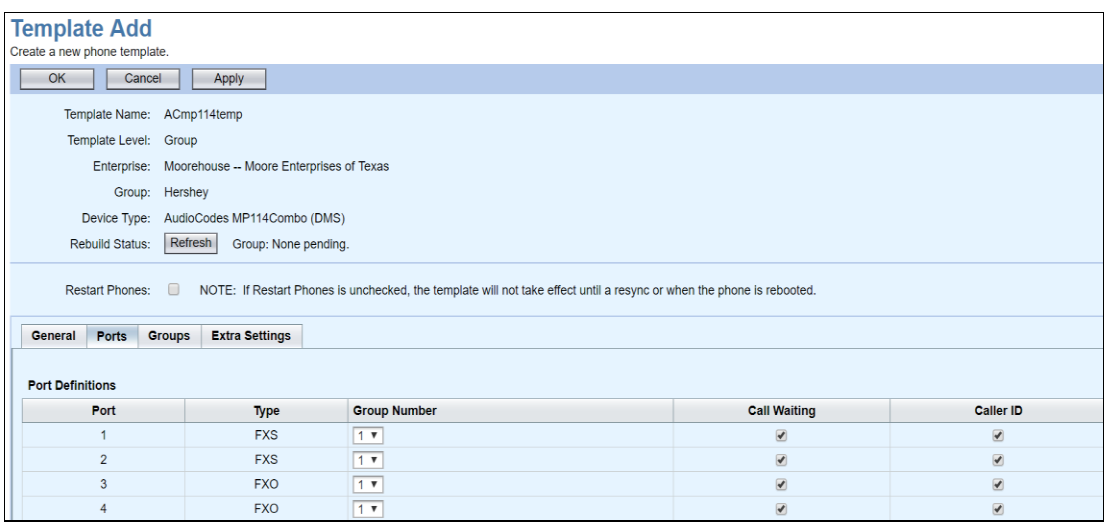


Figure 28 Template Add – Ports for AudioCodes

- If the Groups tab appears for your device model, 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 Trunk 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.

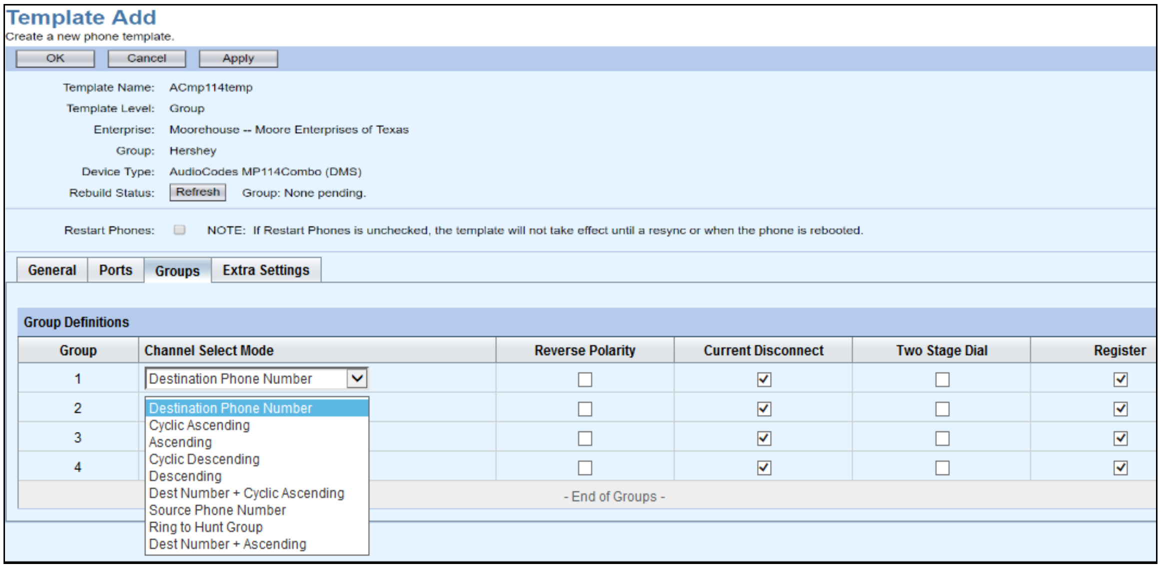


Figure 29 Template Add – Groups for AudioCodes

- Select the Group Definitions for each group.
- **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.
- **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.
- **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.
- **Register**: Indicates whether the endpoints in the group are to register.

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

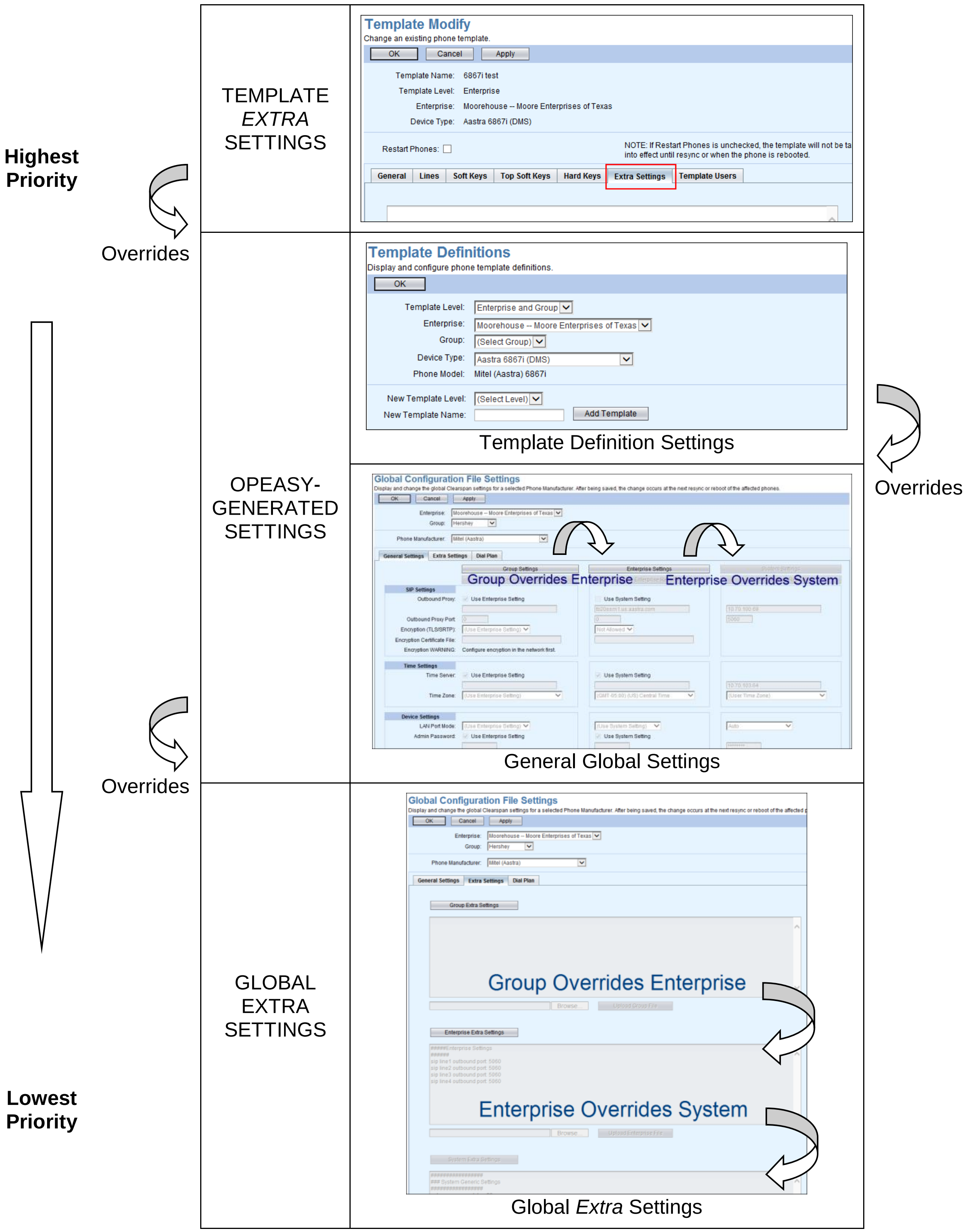
16. If you are modifying an existing template, select the **Template Users** tab to display a list of users or devices that use this template.

17. 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.


Highest Priority
Overrides
Overrides
Lowest Priority
TEMPLATE *EXTRA* SETTINGS
Template Modify
Change an existing phone template.
OK
Cancel
Apply
Template Name: 6867i test
Template Level: Enterprise
Enterprise: Moorehouse -- Moore Enterprises of Texas
Device Type: Aastra 6867i (DMS)
Restart Phones:
General
Lines
Soft Keys
Top Soft Keys
Hard Keys
Extra Settings
Template Users
OPEASY-GENERATED SETTINGS
Template Definitions
Display and configure phone template definitions.
OK
Template Level: Enterprise and Group
Enterprise: Moorehouse -- Moore Enterprises of Texas
Group: (Select Group)
Device Type: Aastra 6867i (DMS)
Phone Model: Mitel (Aastra) 6867i
New Template Level: (Select Level)
New Template Name:
Add Template
Template Definition Settings
Overrides
Global Configuration File Settings
Group Overrides Enterprise
Enterprise Overrides System
General Global Settings
GLOBAL EXTRA SETTINGS
Global Configuration File Settings
Group Extra Settings
Group Overrides Enterprise
Enterprise Extra Settings
Enterprise Overrides System
Global *Extra* Settings

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 displays.
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, click the **System/Enterprise/Group Settings** buttons and make your selections.
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.
8. Certain device-specific settings not available in OpEasy menus can be set manually on the Extra Settings tab by typing into the text fields or uploading a text file that contains the appropriate settings.

The following sections describe the global settings for Mitel (Aastra) phones, AudioCodes devices, and Clearspan Communicator. For global settings information for Panasonic and Polycom phones, refer to Phone Templates: Global Settings for Panasonic Phones on page 202, and System, Enterprise, and Group Global Settings for Polycom Phones on page 183.

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

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**.

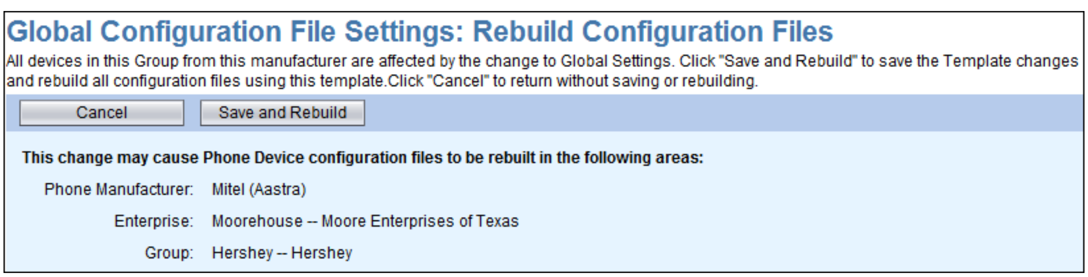


Figure 30 Global Configuration File Settings: Rebuild Configuration Files Page

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

SYSTEM, ENTERPRISE, AND GROUP MITEL (AASTRA) PHONE GLOBAL SETTINGS

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

- SIP Settings – Outbound Proxy, Outbound Proxy Port (No Encryption) and Outbound Proxy Port (Encryption), Encryption settings, and Subscription Time.
- Time Settings
  - **Time Server** 1, 2, and 3 are text fields that contain the FQDN/IP address of the first, second, and third time servers, respectively
  - **SIP Phone Time Zone**
- Device Settings
  - **LAN Port Mode**
  - **Admin Password** and **User Password**. Valid password characters are a-z, A-Z, 0-9, or special characters – (dash), _ (underscore), . (period), or @ (at symbol).
  - **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), #2, #3, and #4 (lowest priority).
- Quality Monitoring – Quality Monitoring Enable, Collector Server Address, and Collector Server Port. The Collector Server Address is the fully qualified domain name, for example telchemy@tb20.mitel.com.
- 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 contains a list of 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 setting applies to only the 6867i, 6869i, and 6873i 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 (eg. 9995551234.png)
- **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.

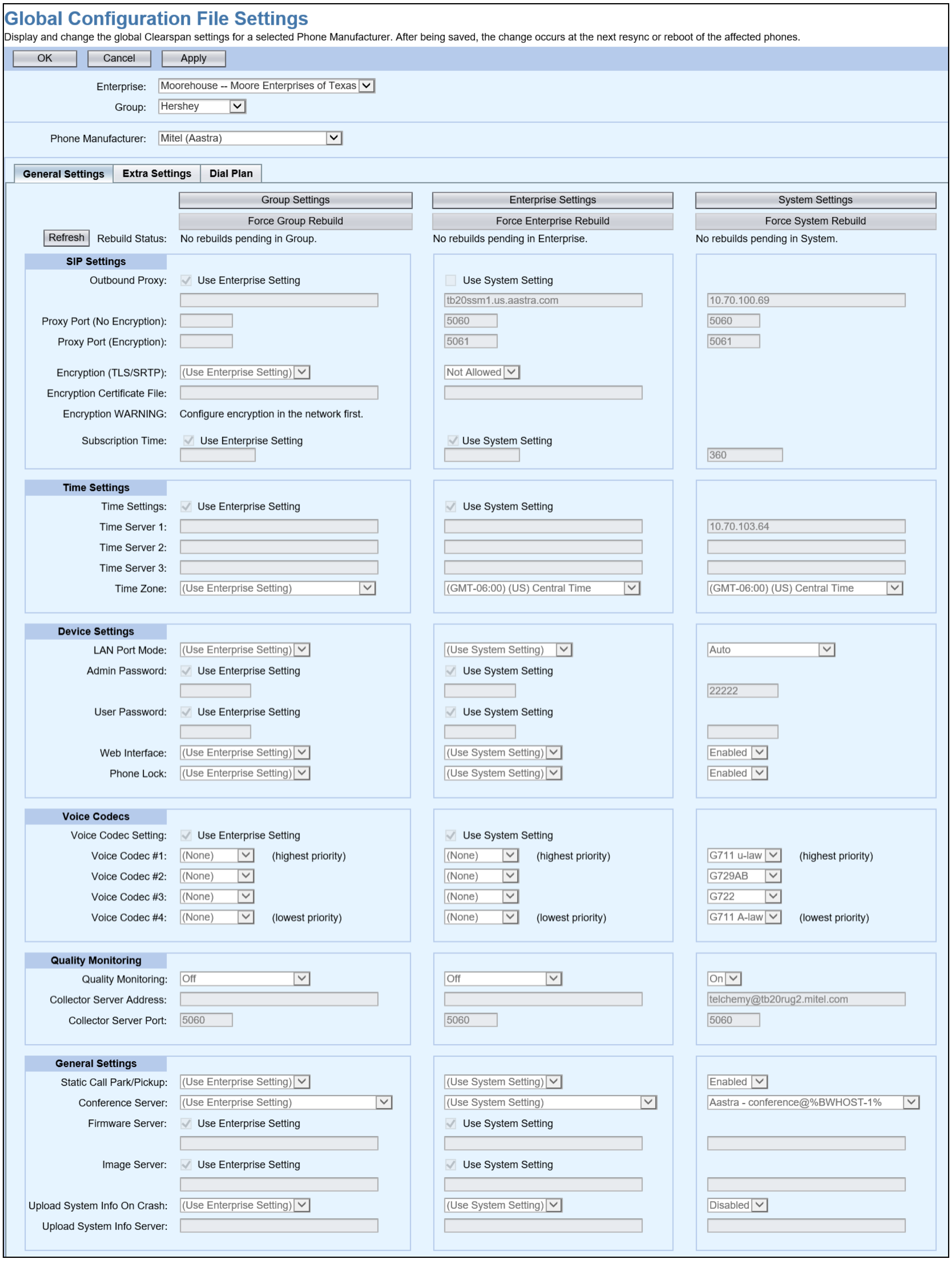


Figure 31 Global Configuration File Settings Page – Aastra/Mitel Phones

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, Outbound Proxy Port.
- Time Settings – Time Server and SIP Phone Time Zone.
- Voice Codecs – Voice Codec #1 (highest priority), #2, #3, and #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 AUDIOCODES GLOBAL SETTINGS

The Global Configuration File Settings page contains the following settings for AudioCodes MP-1xx/MP-1288 devices:

- SIP Settings – External Proxy, External Proxy Port, External Backup Proxy, Local SIP Port, Local SIP TLS Port.
- 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, and SAS Default Gateway Port.
- DNS Servers – DNS Server Settings, Primary DNS Server and Secondary DNS Server.
- Time Settings – Time Server Settings, Time Server, Backup Time Server, and Time Zone.
- Device Settings – LAN Port Mode.
- Voice Codecs – Voice Codec Settings, Voice Codec #1 (highest priority), #2, #3, and #4 (lowest priority).
- SNMP Settings – SNMP Traps, SNMP Server 1, SNMP Server 2, SNMP Server 3, SNMP Server 4, and SNMP Server 5.
- Quality Monitoring – Quality Monitoring (Session Only or Session and Periodic), Collector Server Address, and Collector Server Port. The Collector Server Address is the fully qualified domain name, for example telchemy@tb20.mitel.com.
- Conference Server is the conference server to be used for conference calls. The drop-down list contains a list of configured conference servers.

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, Outbound Proxy Port, and Proxy Discovery Domain. Outbound Proxy Port (No Encryption) and Outbound Proxy Port (Encryption) for Clearspan Communicator – Desktop and Clearspan Communicator – S4B.Encryption (TLS/SRTP) – Required or Not Allowed (Desktop and S4B only).
- Codecs – Adaptive Quality (Mobile and Tablet only).
- Voice Codecs – Voice Codec #1 (highest priority), #2, #3, #4, and #5 (lowest priority).
- Video Codecs – Video Codec #1 (highest priority), and #2 (lowest priority).
- Quality Monitoring – Quality Monitoring, Collector Server Address, and Collector Server Port. The Collector Server Address is the fully qualified domain name, for example telchemy@tb20.mitel.com.

VIEWING OR EDITING DIAL PLANS

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.

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 displays.
3. Select the **Enterprise** and **Group** from the drop-down lists.
4. Select the **Phone Manufacturer.** The available manufacturers depend on the device types configured for the Enterprise.
5. Click the **Dial Plan** tab.

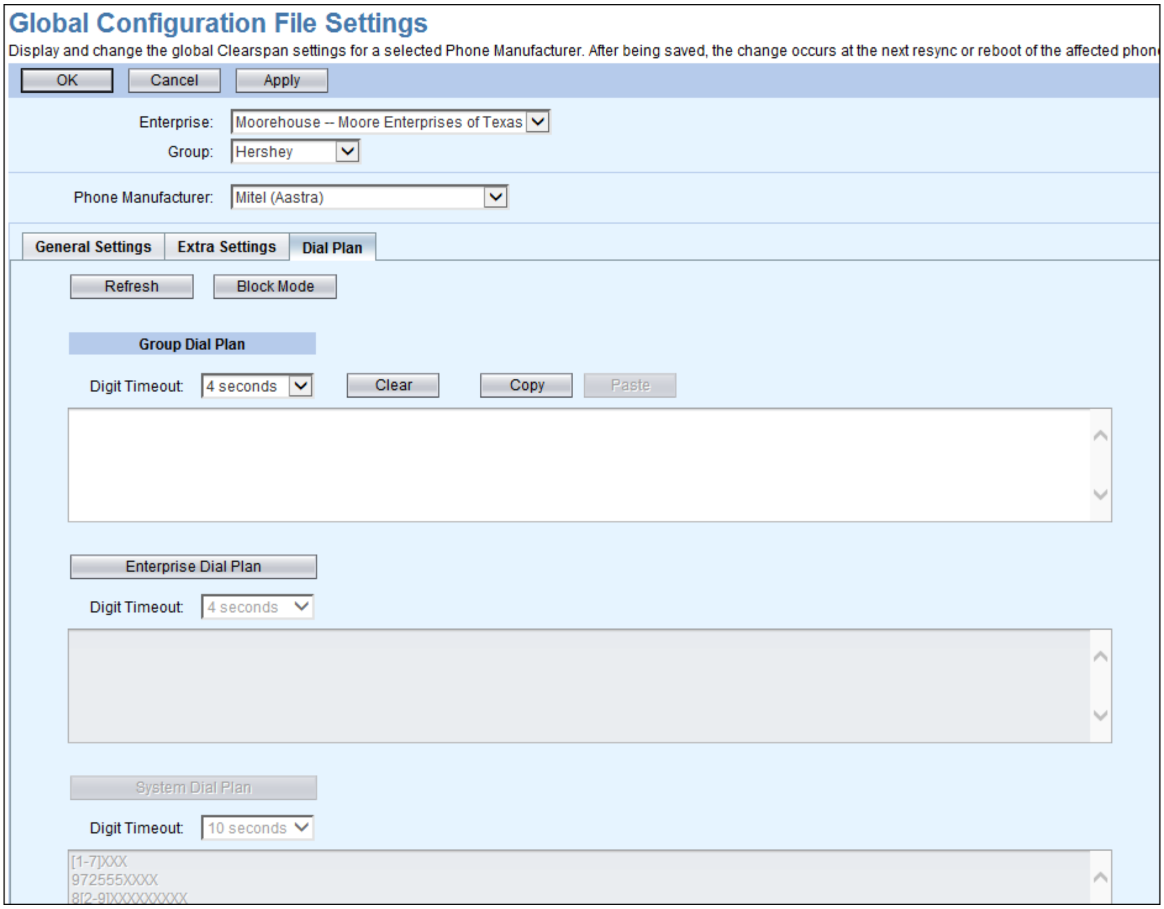


Figure 32 Global Configuration File Settings: Dial Plans Tab

6. Enter or modify the dial plans at the System, Enterprise, and Group levels. A dial plan is the expected sequence of digits dialed from a phone to make calls or activate certain features.

- 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 desired. 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.

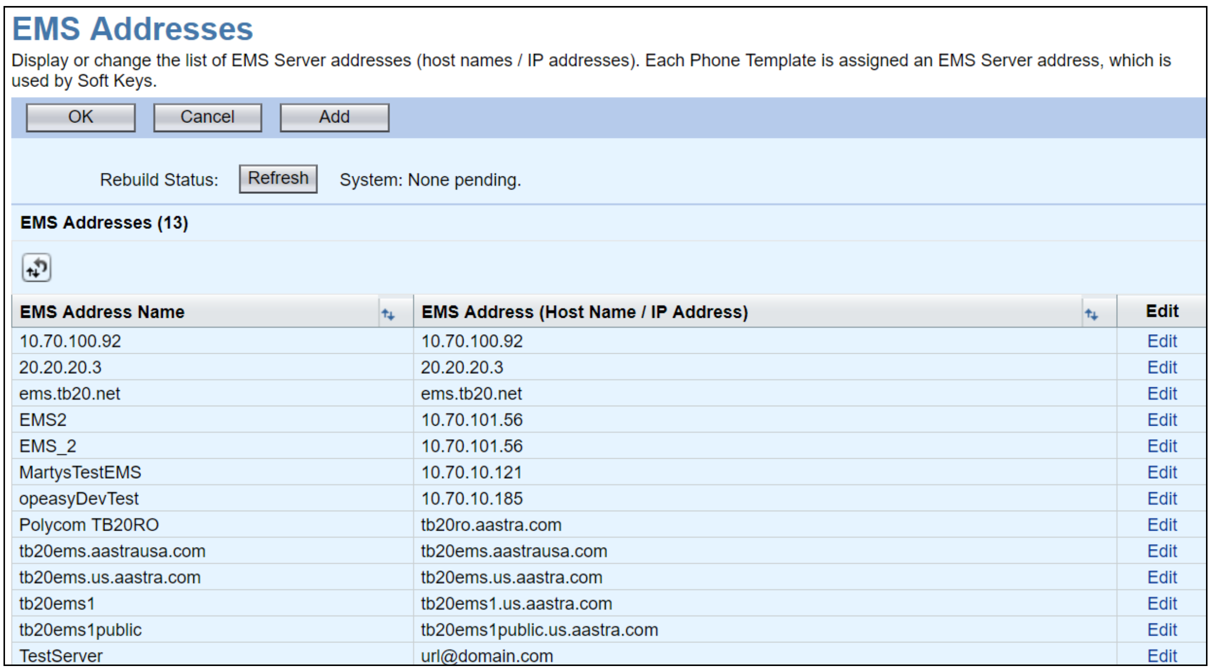
7. If modifications have been made, click **OK**. If no modifications have been made, or you wish to cancel your changes, click **Cancel**.

Note: For information about Dial Plans specific to Panasonic phones, refer to the appendix of this guide.

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**.
2. 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 displays. The current EMS servers are displayed in the list.



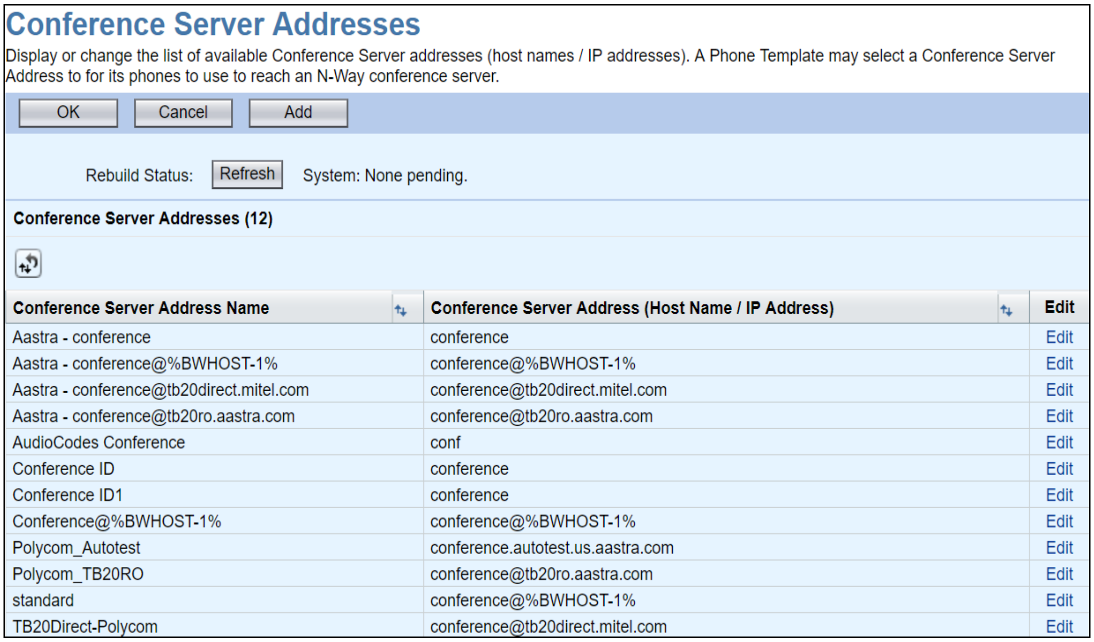
EMS Address Name	EMS Address (Host Name / IP Address)	Edit
10.70.100.92	10.70.100.92	Edit
20.20.20.3	20.20.20.3	Edit
ems.tb20.net	ems.tb20.net	Edit
EMS2	10.70.101.56	Edit
EMS_2	10.70.101.56	Edit
MartysTestEMS	10.70.10.121	Edit
opeasyDevTest	10.70.10.185	Edit
Polycom TB20RO	tb20ro.aastra.com	Edit
tb20ems.aastrausa.com	tb20ems.aastrausa.com	Edit
tb20ems.us.aastra.com	tb20ems.us.aastra.com	Edit
tb20ems1	tb20ems1.us.aastra.com	Edit
tb20ems1public	tb20ems1public.us.aastra.com	Edit
TestServer	url@domain.com	Edit

Figure 33 Phone Templates Page - EMS AddressesClick 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. A Phone Template may select a Conference Server Address for its phones to use to reach an N-Way conference server.

1. From the main menu, select **Provisioning**, and then select **Phone Templates**.
2. 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 displays. The current Conference Servers are displayed in the list.



Conference Server Addresses

Display or change the list of available Conference Server addresses (host names / IP addresses). A Phone Template may select a Conference Server Address to for its phones to use to reach an N-Way conference server.

OK Cancel Add

Rebuild Status: Refresh System: None pending.

Conference Server Addresses (12)

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@tb20direct.mitel.com	conference@tb20direct.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.autotest.us.aastra.com	Edit
Polycom_TB20RO	conference@tb20ro.aastra.com	Edit
standard	conference@%BWHOST-1%	Edit
TB20Direct-Polycom	conference@tb20direct.mitel.com	Edit

Figure 34 Phone Templates Page – Conference Server AddressesClick OK**.**

PHONE MANAGEMENT

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

POLYCOM PHONE SUPPORT

You can use OpEasy to configure certain Polycom phones when the Polycom Phone Support 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 DEVICE TEMPLATES

To view existing Phone Templates:

1. Select **Provisioning** from the main menu, and then select **Phone Management**.
2. Select the **Enterprise** and **Group**, if necessary.
3. Select the **Device Levels**.
4. Click **Search** to display all phone devices.
5. 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 template appears as shown in the following example.

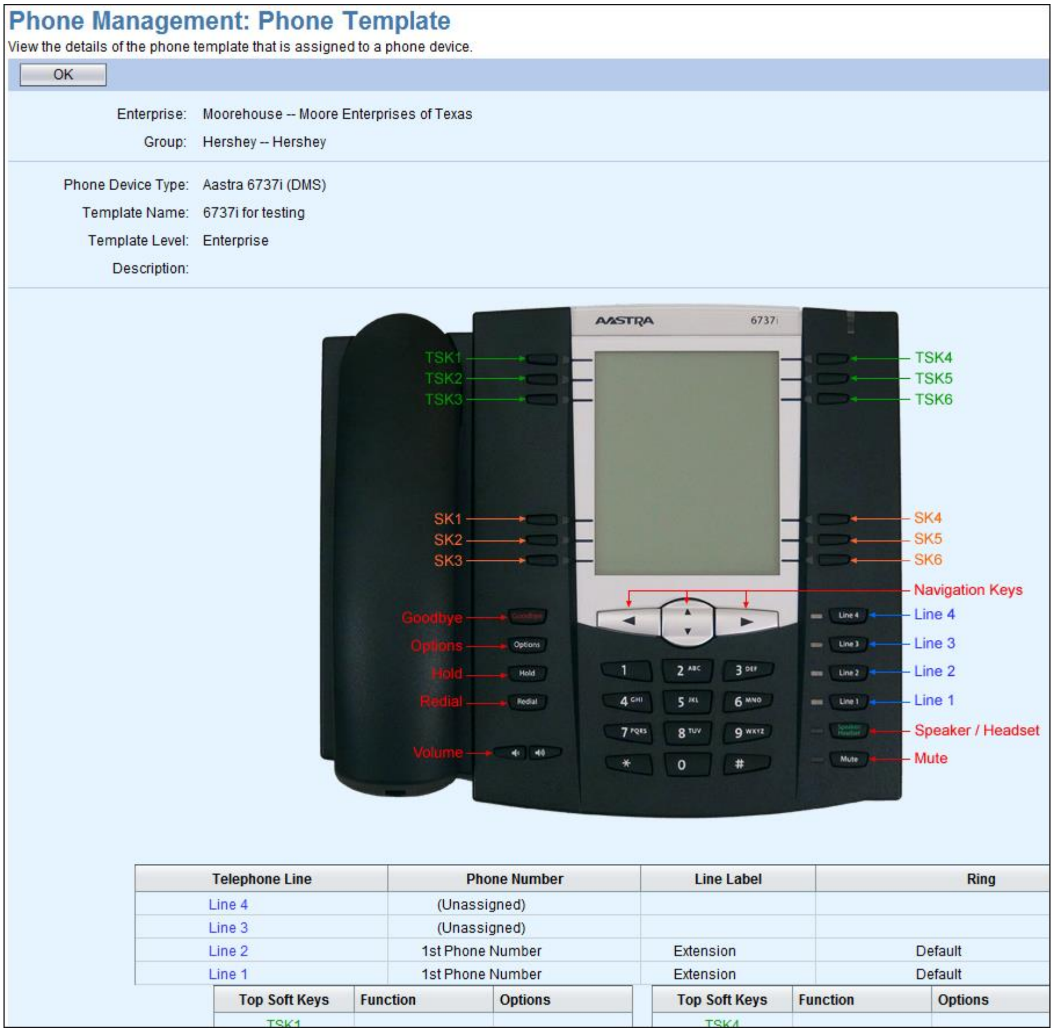


Figure 35 Viewing Phone Template Details

RESTARTING PHONE DEVICES

1. From the main menu, select **Provisioning**, and then select **Phone Management**.
2. Select the **Enterprise** and **Group** from the drop-down lists, if necessary.
3. Select the **Device Levels**.
4. Click **Search** to display all phone devices for the group.
5. Check the box in the **Selected** column for phone devices that you want to restart. Check the **Select All Phones** box if you want to place a check mark in the column for all phones.
6. Check **Restart Phones on Save** to restart the selected phones when settings are saved.
7. Click **Restart Selected Phones** to restart only those phones where there is a check mark in the **Selected** column.

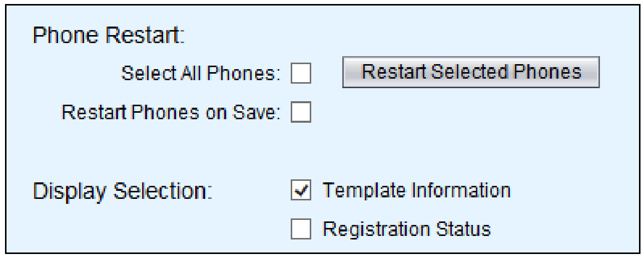


Figure 36 Phone Restart and Display Selection Sections

8. Under Display Selection, check the **Template Information** box to include Phone Template information in the "Phone Devices" table. Check **Registration Status** to displays column for this additional information in the table.

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**.
2. Click **Phone Management** from the menu tree, or click **Phone Management** from the Provisioning page menu.
3. Select the **Device Levels**.
4. Click **Add**. The Phone Device Add page displays as in Figure 37.

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

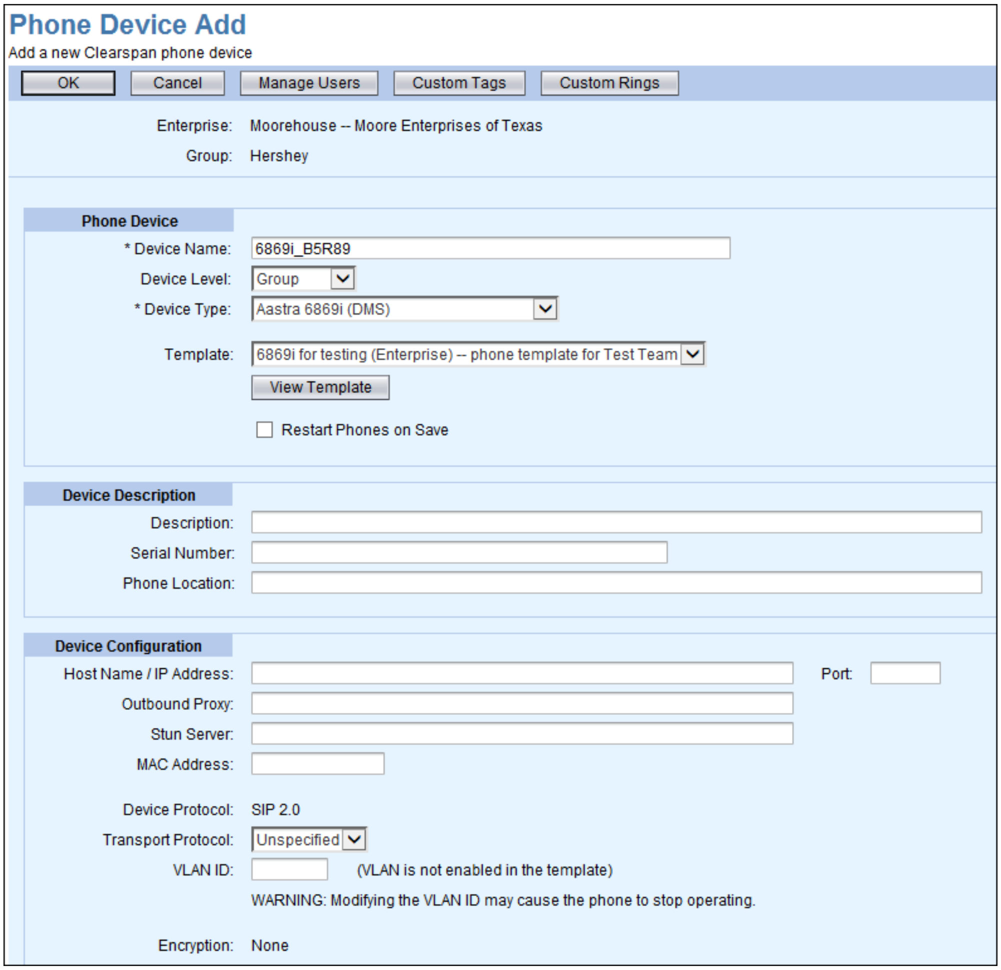


Figure 37 Phone Device Add Page

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

11. The **Device Protocol** is “SIP 2.0” by default.

12. The **Transport Protocol** is “Unspecified” by default.

13. Enter the **VLAN ID**. Note that modifying the VLAN ID may cause the phone to stop operating.

14. Enter the **ERL Record Name** (Optional Emergency Response Location data for E911 Emergency services).

15. The **Encryption** setting of the phone is specified by the template or global settings. If **Encryption Override** has been temporarily enabled, you can disable it.

16. 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.

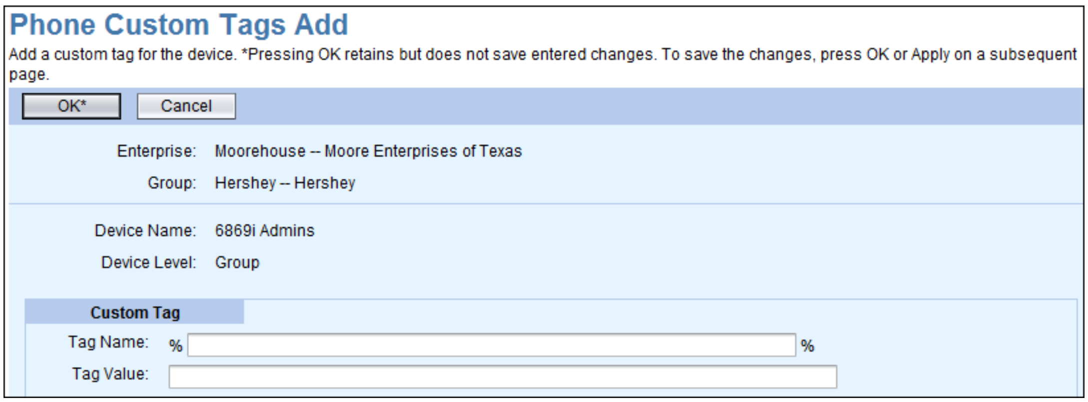


Figure 38 Phone Custom Tags Add Page

17. 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.

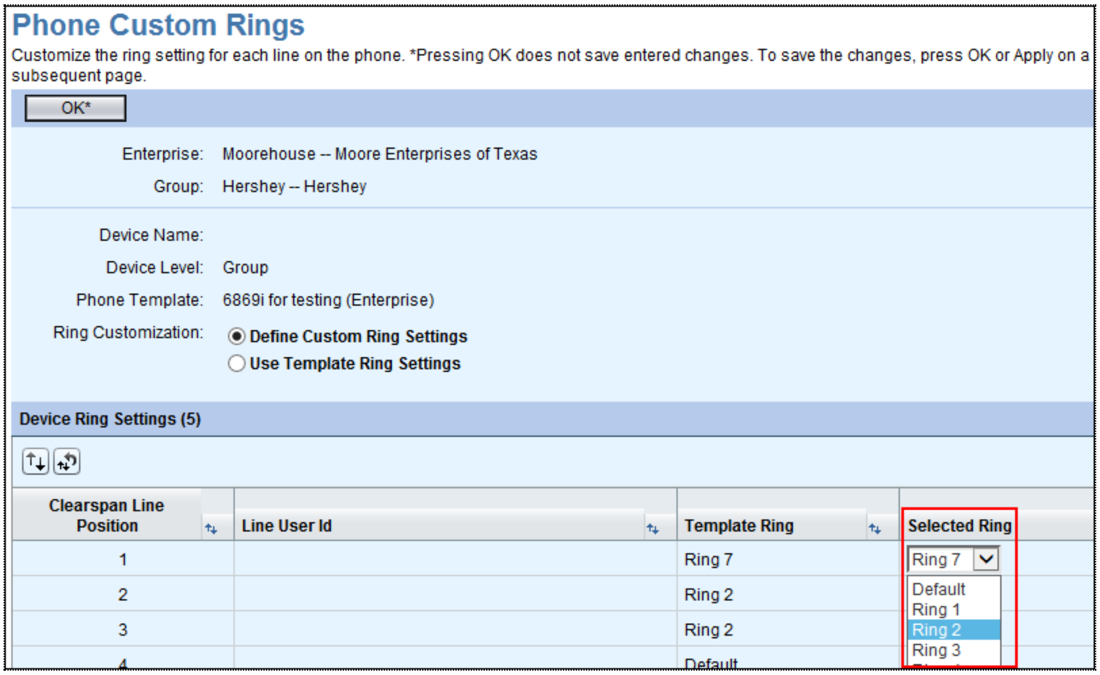


Figure 39 Phone Custom Rings Page

18. Click **OK**. The Phone Device Modify page displays.
19. 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 Re-ordering Users on a Phone Device.

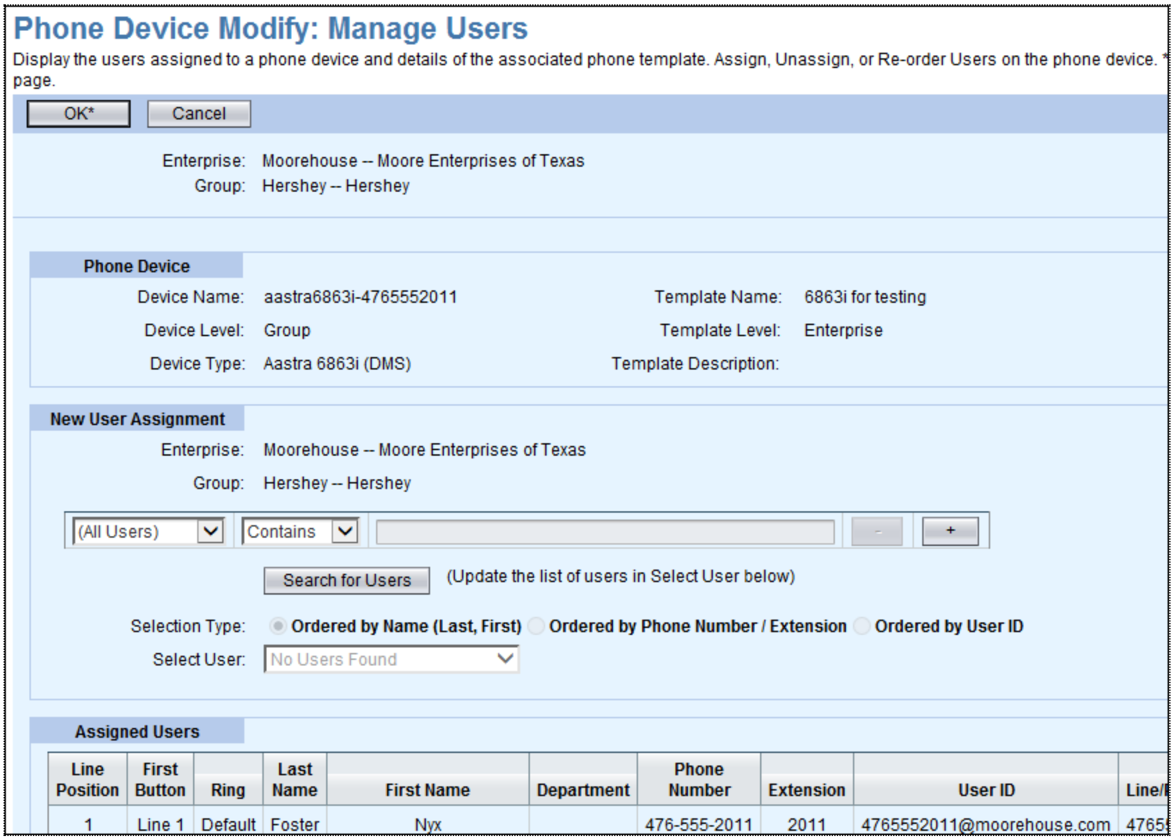


Figure 40 Phone Management: Manage Users

20. Click **OK**.
21. Click **OK** again. The Phone Management page displays. The new device appears in the list.

MODIFYING OR DELETING A PHONE DEVICE

1. From the main menu, select **Provisioning**.
2. Click **Phone Management** from the menu tree, or click **Phone Management** from the Provisioning page menu.
3. Select the **Enterprise** and **Group** from the drop-down lists, if necessary.
4. Select the **Device Levels**.
5. Click **Search** to display all devices, or enter search parameters to filter your search. The search in the following figure is an example of the Phone Management page, searching for the device name containing the string “68”.

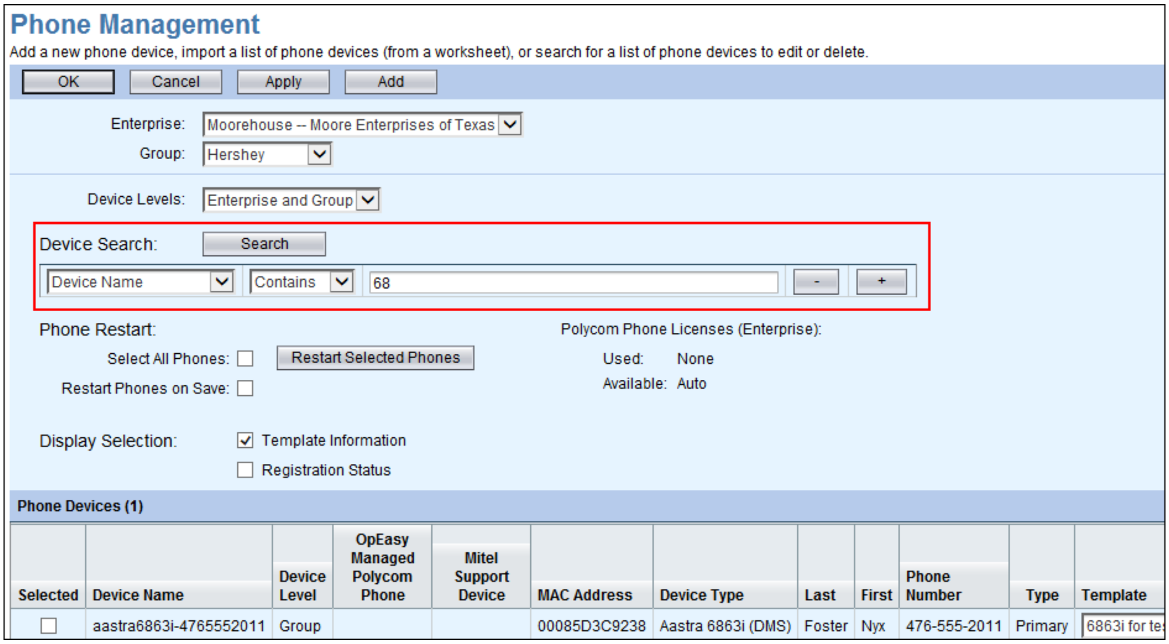


Figure 41 Phone Device Search Example

6. Click on the **Edit** link at the end of the row for the phone device you want to edit or delete.
7. Make any changes to the configuration that you need to make using the procedures in section *Under Display Selection,* check the **Template Information** box to include Phone Template information in the "Phone Devices" table. Check **Registration Status** to displays column for this additional information in the table.

   Adding a Phone Device. You can also view the template using the **View Template** button. Click the **Delete** button to delete the phone device, and click **OK** in the confirmation dialog box.

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

9. Click **OK** or **Apply**.

CHANGING THE PHONE TEMPLATE ON A DEVICE

1. From the main menu, select **Provisioning**.
2. Click **Phone Management** from the menu tree, or click **Phone Management** from the Provisioning page menu.

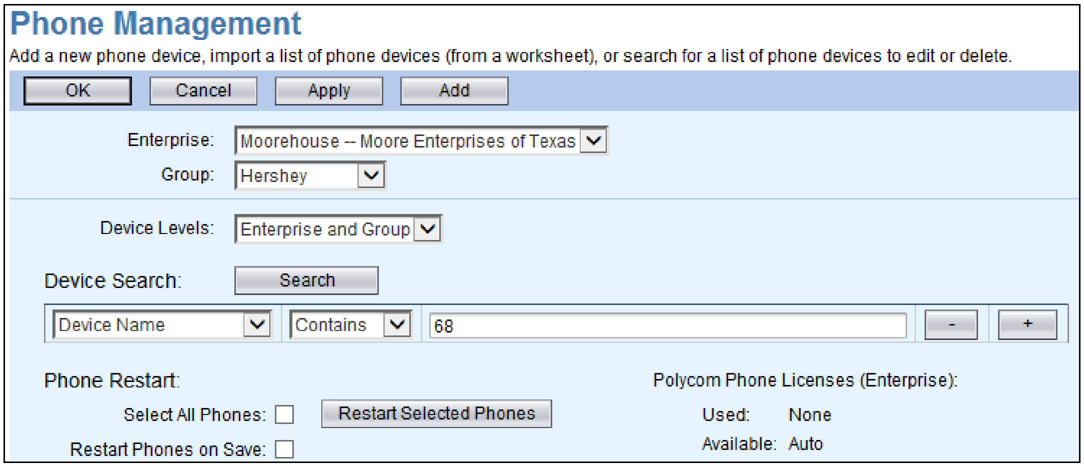


Figure 42 Phone Management Page

3. Select the **Enterprise** and **Group** from the Enterprise drop-down lists.
4. Select the **Device Levels**.
5. Click **Search** to display all devices, or enter search parameters to filter your search. A list of phone devices configured for this group displays.
6. Select the new template from the **Template Name** drop-down list on the row of the desired phone device, as shown in the following example.

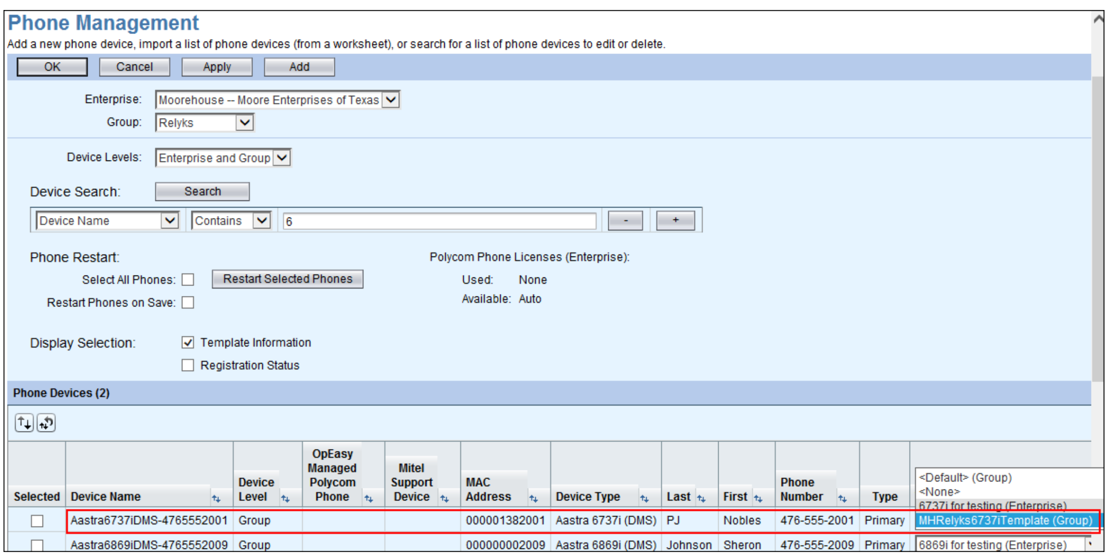


Figure 43 Changing Template for a Phone Device

7. If you want to restart the device so it can pick up the new template, check **Restart Phones on Save**.
8. Under Display Selection, check the **Template Information** box to include Phone Template information in the "Phone Devices" table. Check **Registration Status** to displays column for this additional information in the table.
9. Click **OK** or **Apply**.

ASSIGNING, REMOVING, OR RE-ORDERING USERS ON A PHONE DEVICE

1. From the main menu, select **Provisioning**.
2. Click **Phone Management** from the menu tree, or click **Phone Management** from the Provisioning page menu.
3. Select the **Enterprise** and **Group** from the drop-down lists.
4. Select the **Device Levels**.
5. Click **Search** to display all devices, or enter search parameters to filter your search. A list of phone devices configured for this group displays.
6. Click **Edit** at the end of the row for the device you want to modify.

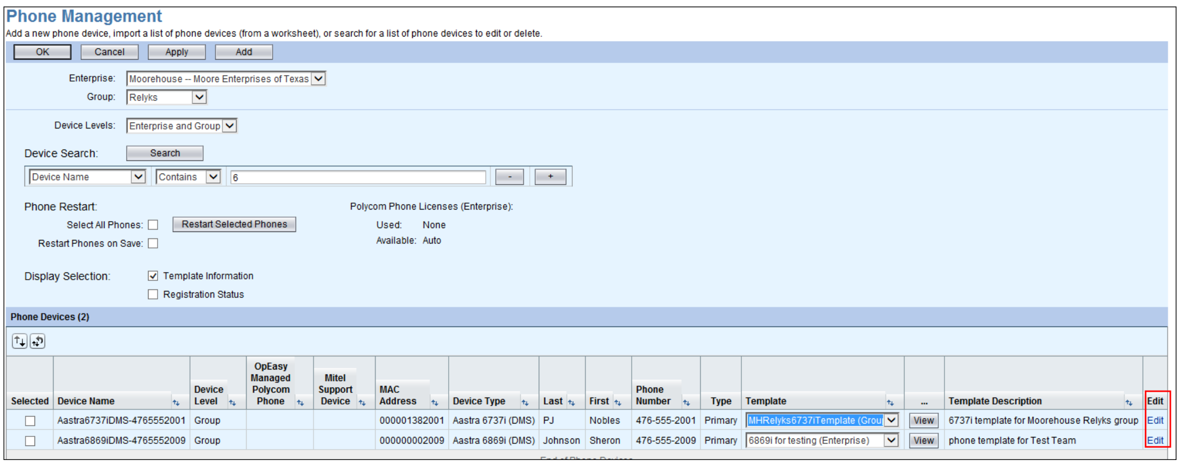


Figure 44 Selecting a Phone Device to Edit

7. On the Phone Device Modify page, click **Manage Users**.

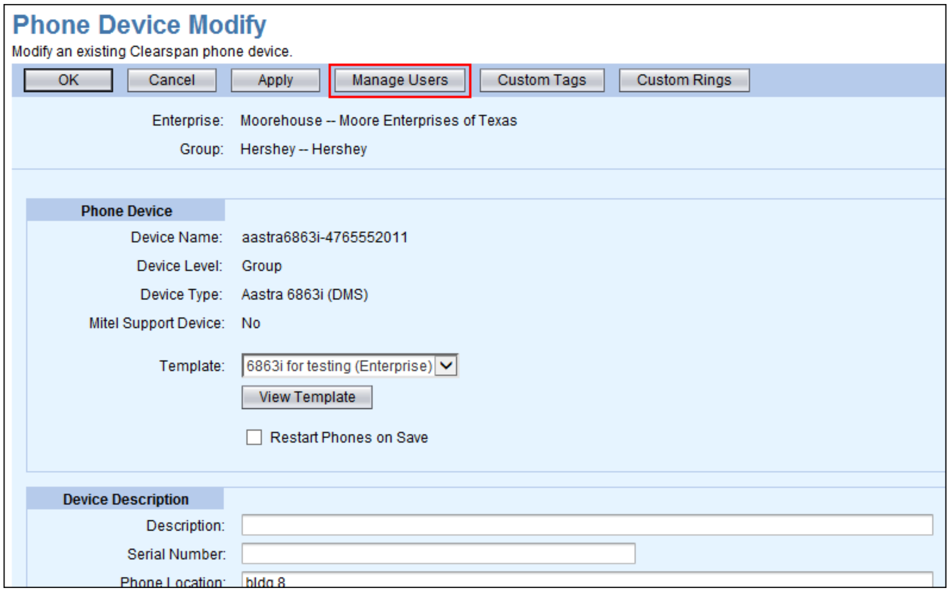


Figure 45 Phone Device Modify: Manage Users Button

8. The Phone Device Modify: Manage Users page displays, where you can 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 see all available users.
2. Select the user you want to add from the **Select User** drop-down menu. You can use search criteria to filter the list of users in the drop-down, and you can choose to list users **Ordered by Name**, **Ordered by Phone Number/Extension**, or **Ordered by User ID**.

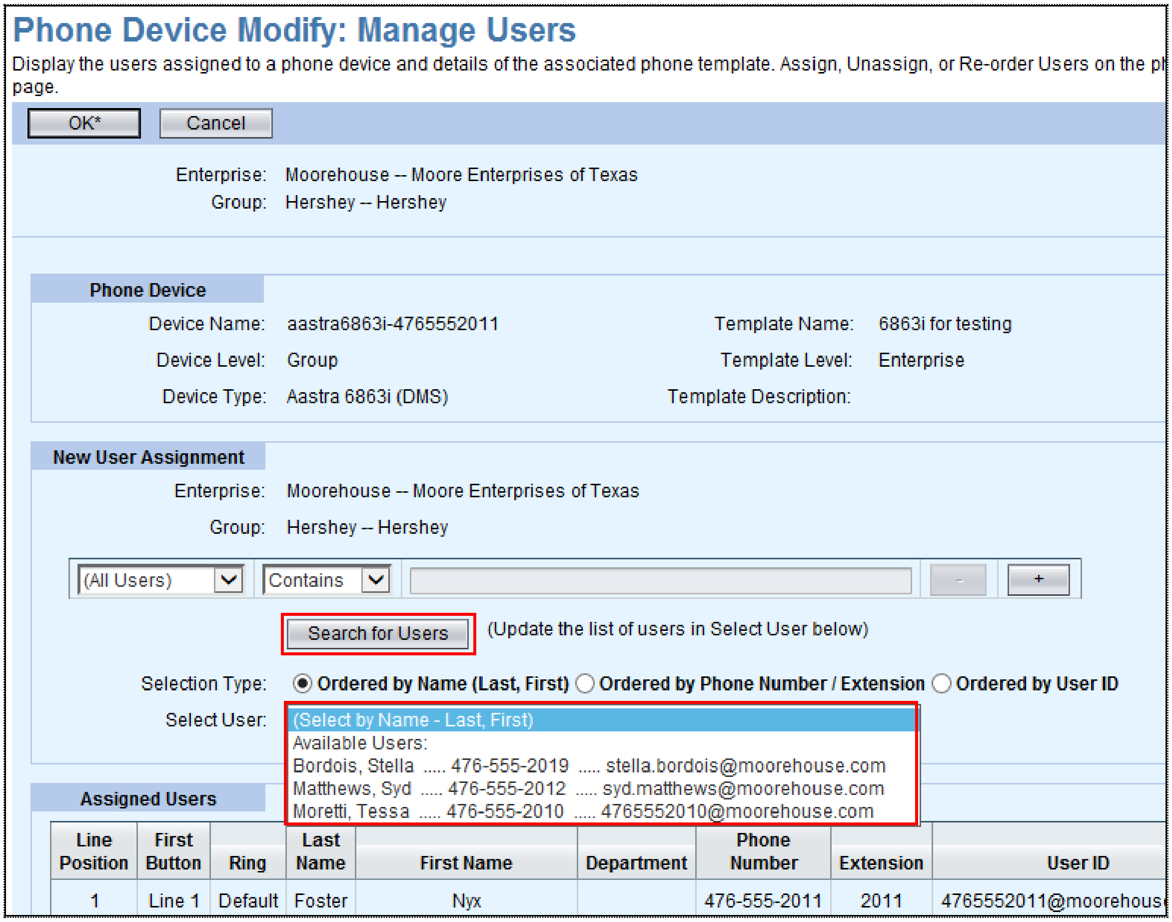


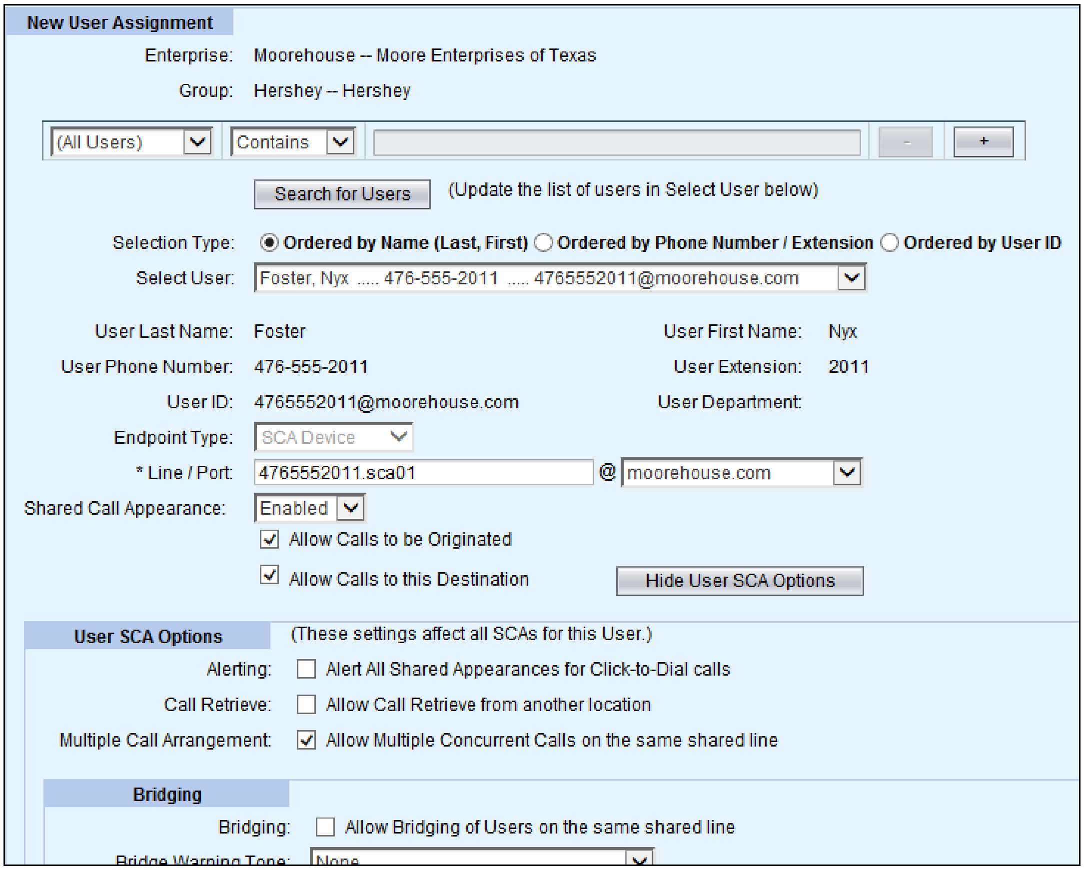
Figure 46 Manage Users: Select User

3. Configure the settings for the assignment, based on **Endpoint Type**. If the Endpoint Type selection is grayed out, then it cannot be changed.

   - SCA Device:

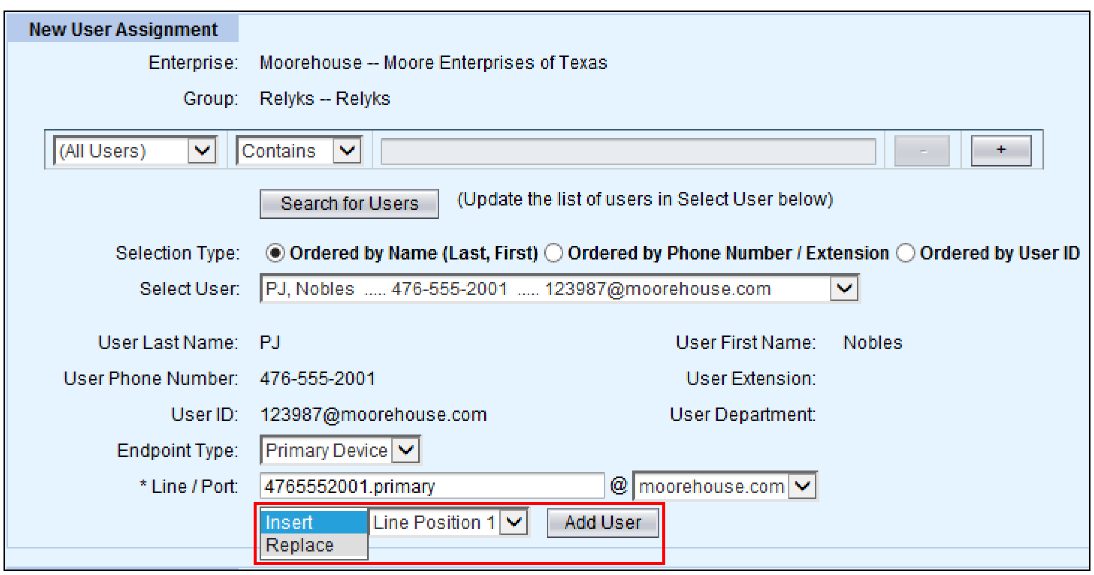
     - Set whether Shared Call Appearance is enabled.
     - Choose whether to Allow Calls to be Originated and Allow Calls to this Destination.
     - Click the Show SCA Options button if you want to change any of the following options for this SCA: Alert All Shared Appearances for Click-to-Dial calls, Allow 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.

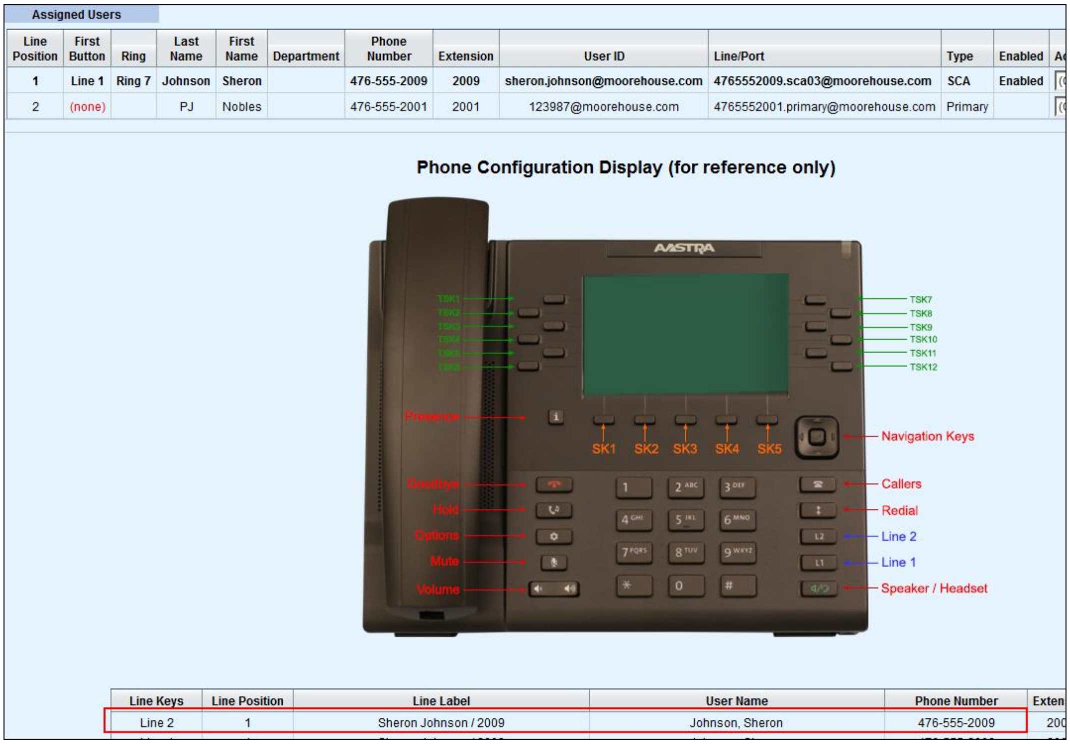


- Primary Device: Select the **Line/Port** to use.

4. Choose whether to **Insert** the user or **Replace** another user with this one, and choose the **Line Position** for the new user. Then click **Add User**.

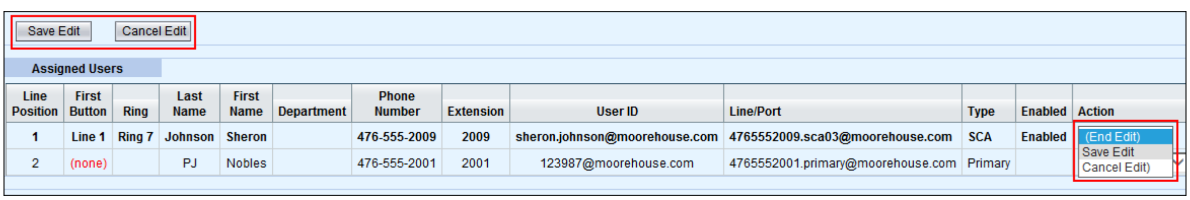


The Assigned Users table is updated, and the display shows the assignments.



5. 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.

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

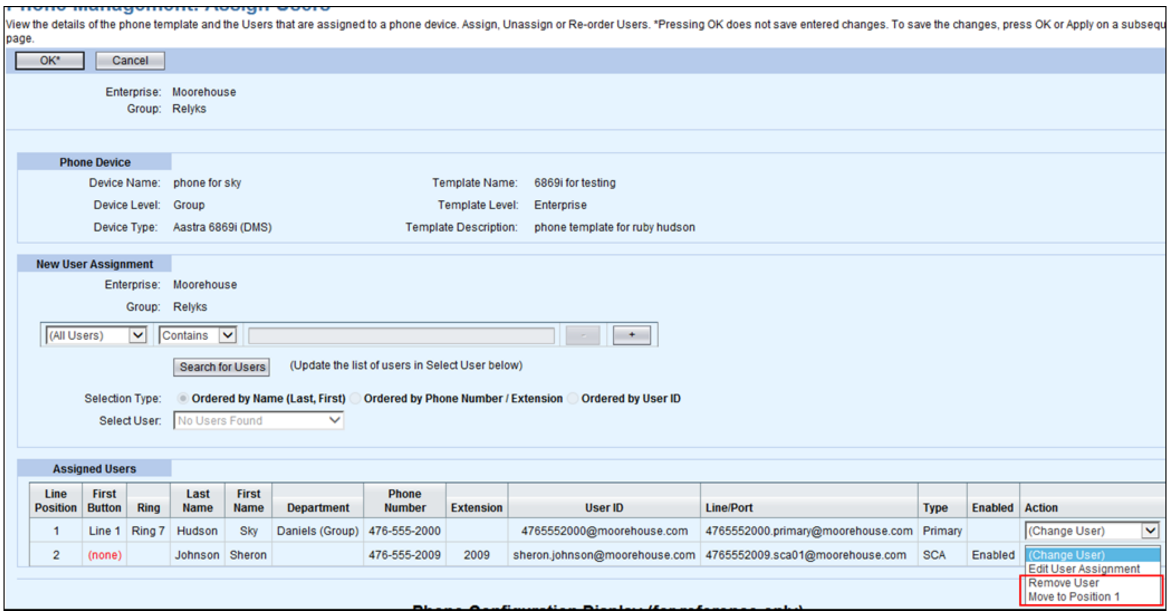


7. Click **OK***. Click **OK** again.

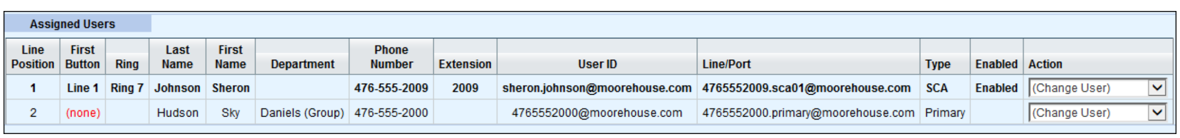
Removing or Reordering Users on a Phone Device

Follow these steps to remove or reorder users on a phone device using Phone Management:

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



The Assigned Users table is updated.



Assigned Users

Line Position	First Button	Ring	Last Name	First Name	Department	Phone Number	Extension	User ID	Line/Port	Type	Enabled	Action
1	Line 1	Ring 7	Johnson	Sheron		476-555-2009	2009	sheron.johnson@moorehouse.com	4765552009.sca01@moorehouse.com	SCA	Enabled	(Change User)
2	(none)		Hudson	Sky	Daniels (Group)	476-555-2000		4765552000@moorehouse.com	4765552000.primary@moorehouse.com	Primary		(Change User)

2. 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 displays as shown in the following example.

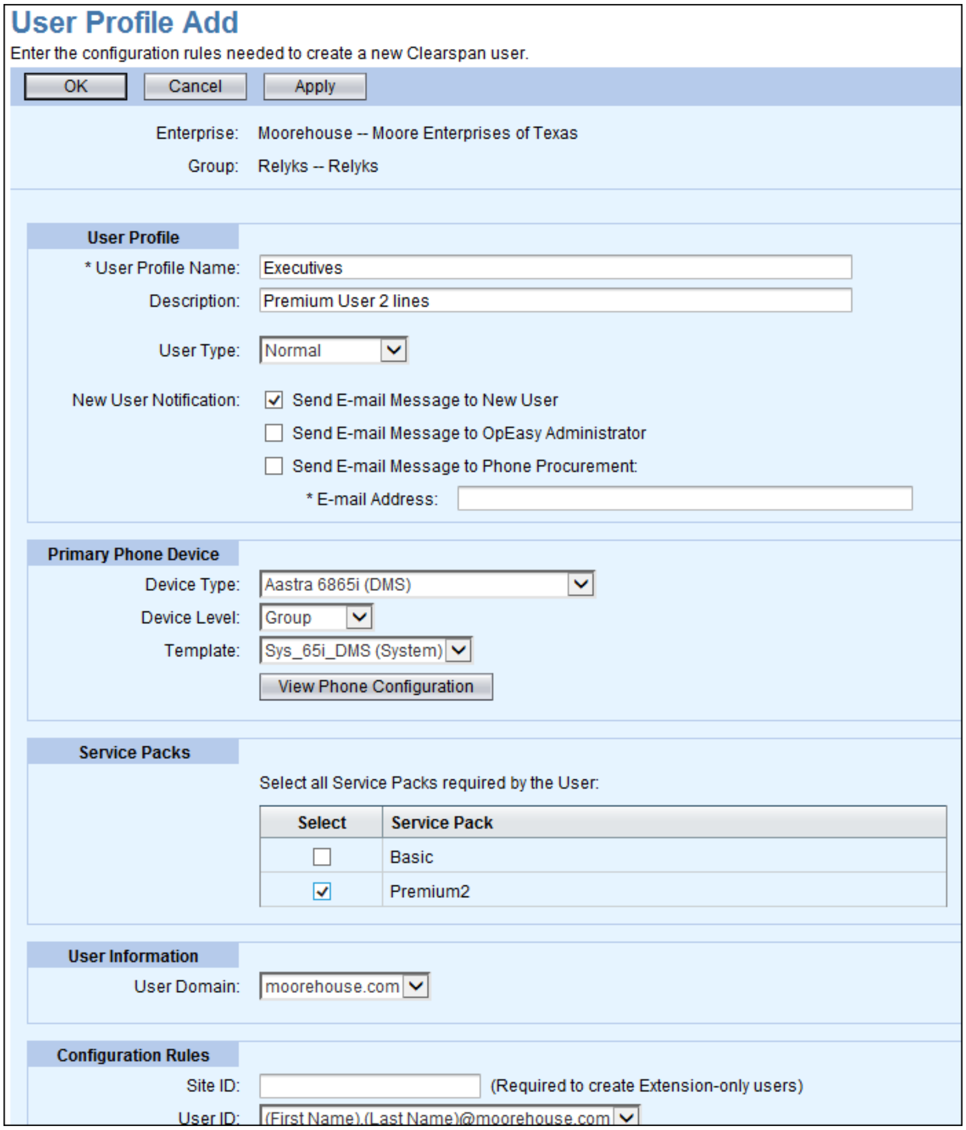


Figure 47 User Profile Add Page - Top

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. Select the **User Domain** from the drop-down list. The drop-down list contains all domains assigned to this Enterprise and Group.

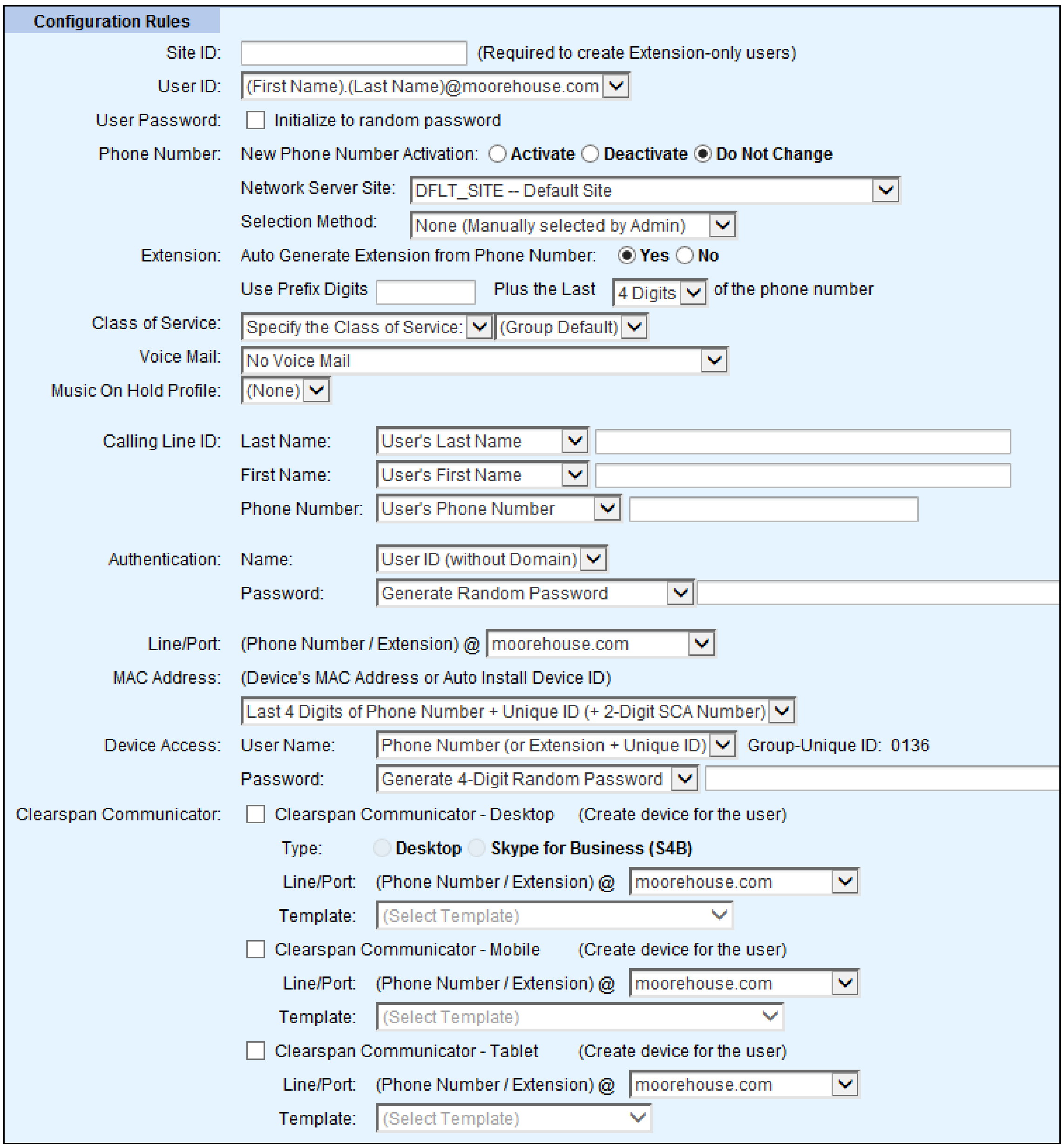


Figure 48 User Profile Add Page – Bottom

14. 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.
15. Select the format for the **User ID** from the drop-down list. The options include, FirstNameLastName, PhoneNumber, or the User's E-mail Address.
16. Check the **User Password** checkbox to initialize the password to a randomly generated value; leaving the box unchecked requires the administrator to enter a password.
17. 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.
18. 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.
19. 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.
20. 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.

21. 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.
22. Make a selection for **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 may 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.

23. If the Voice Mail selection is other than No Voice Mail, the Group Mail Server fields are presented. Enter the **E-mail Address** domain and the **Password** for that server.

24. Choose a **Music On Hold Profile** if that service is assigned and you want to specify those settings for this user profile.

25. 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 (i.e. 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. In order 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.

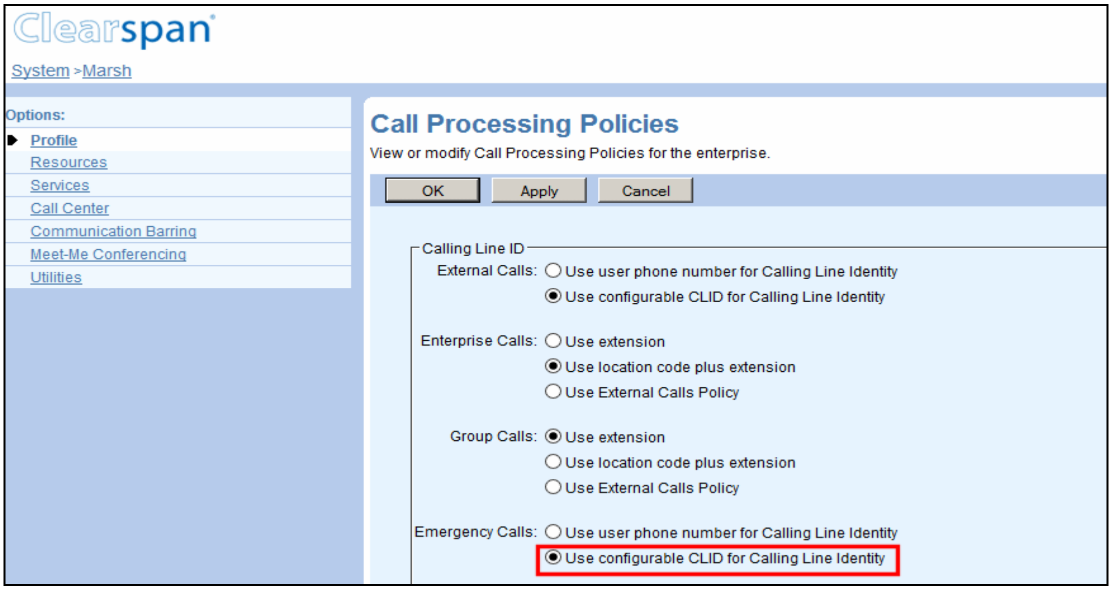


Figure 49 Clearspan Call Processing Policies Page

26. Choose the rules for creation of the **Authentication Name** and **Password**. The Name can be the User ID or a unique ID generated by OpEasy. The Password can be generated randomly by OpEasy 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: - _ . , ! $ % & * + / = ? ^ { } | ~ @.

27. Choose the domain to use for a user's **Phone Line/Port**. Select the domain from the drop-down list.

28. 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 (Aastra) 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.

29. For **Device Access**, choose the method for determining **User Name** and **Password**. This field is only used by Polycom phones.

30. Check the boxes for **Clearspan Communicator** desktop, mobile, or tablet if you choose to enable communication for this user. Also select the **Communicator Line/Port**, which is different than the Device Line/Port if a Remote User Gateway (RUG) is used.

31. 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 displays. 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 displays as in the following example.

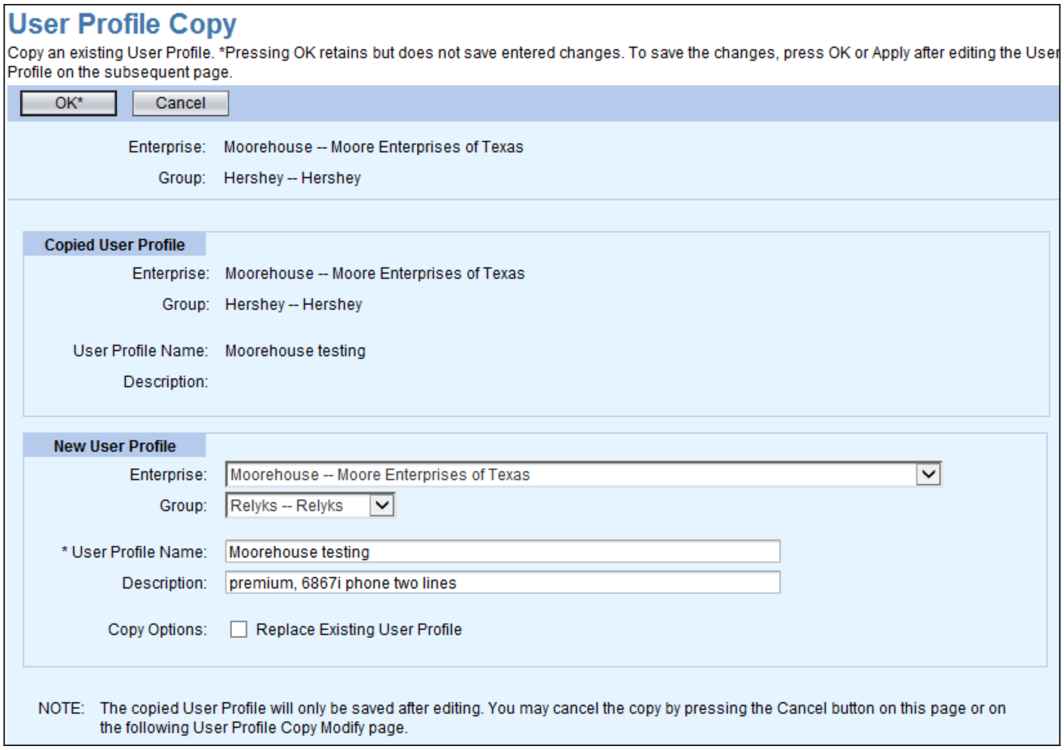


Figure 50 User Profile Copy Page

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. Check the **Replace Existing User Profile** if you wish 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** in order 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 displays to allow 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 displays, where the new profile appears 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**.

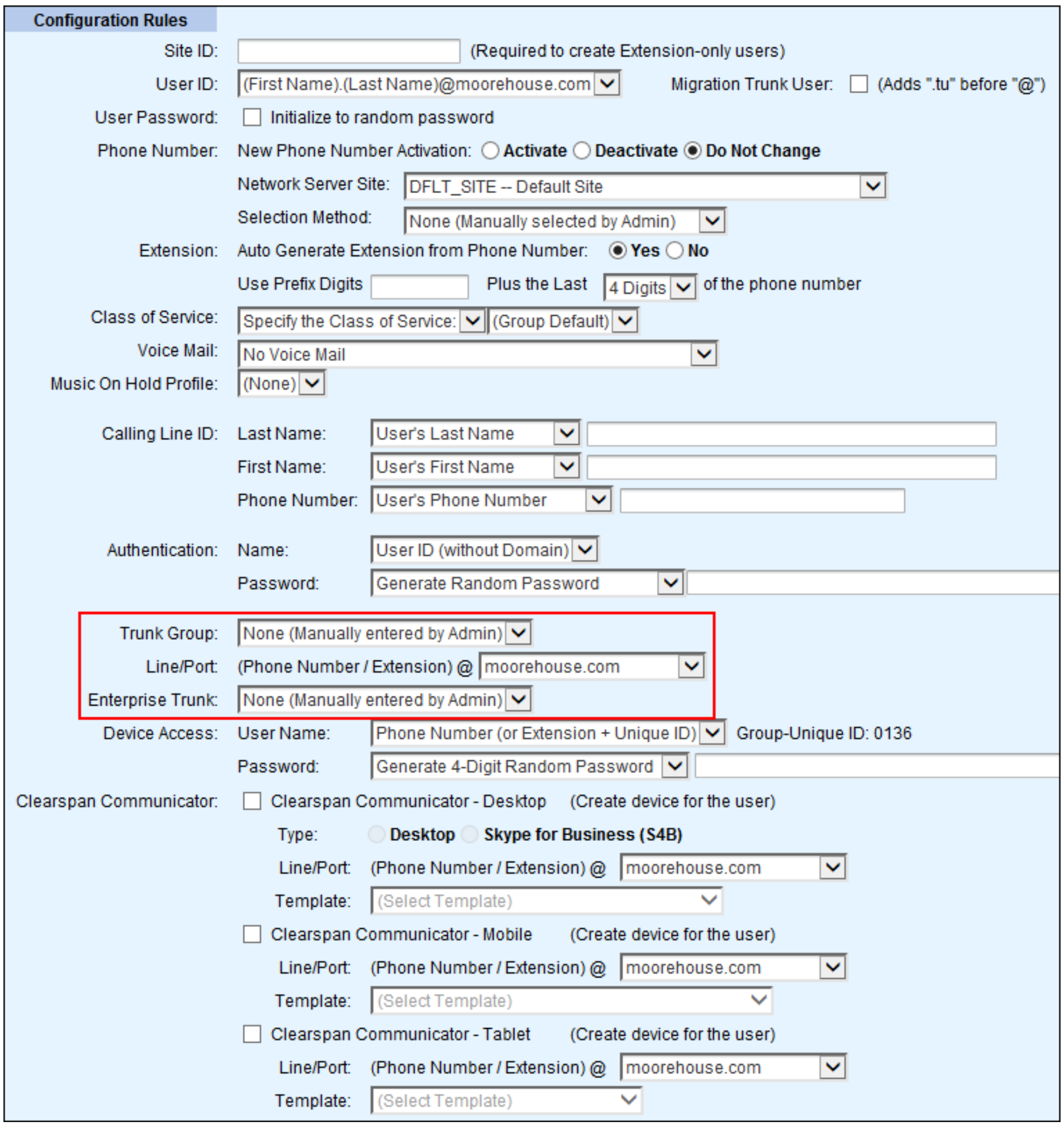


Figure 51 Trunk User Profile Settings

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:
    - 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.
6. 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.
7. 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.

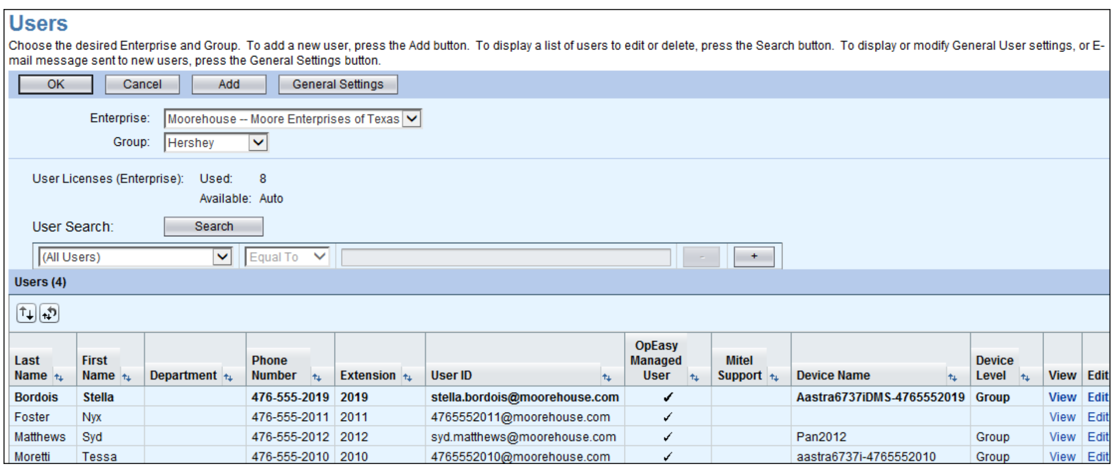
USER LICENSES

The main Users page displays the number of OpEasy **User Licenses** that are used and available. Administrators can, if desired, set the User or Polycom 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 displays.
2. Select the **Enterprise** and **Group** from the drop-down lists, if necessary.
3. You can use search criteria to filter the list, or you can click **Search** to view the full list.



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.

Mitel Support users are created by the Mitel support team for testing and troubleshooting only.

4. Click **Edit** in the search results for the user you want to modify, or click **Add**. The Advanced: User page displays as shown in the following figure. 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.

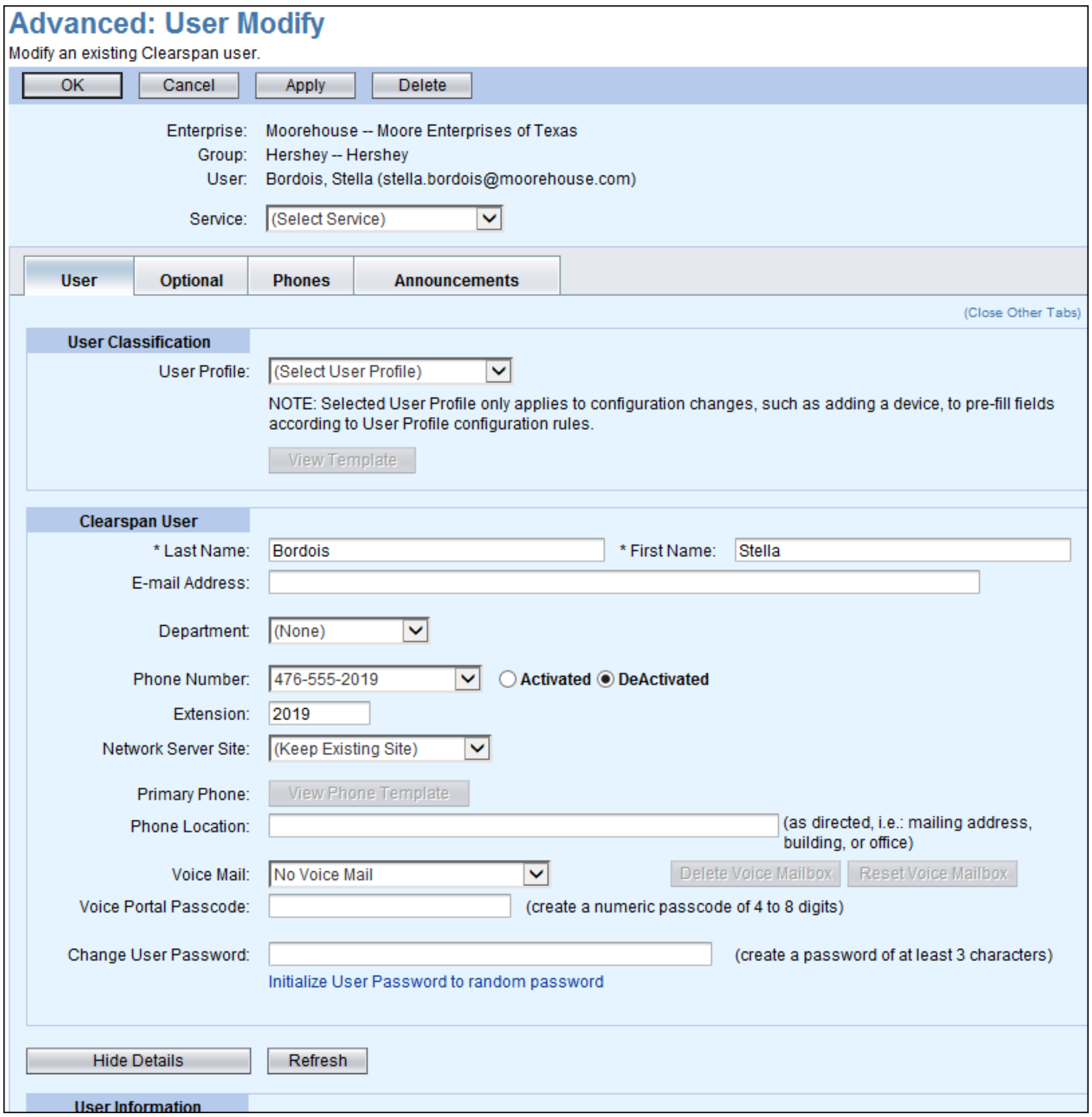


Figure 52 Advanced: User Modify Page, User Tab

Users Tab

1. Select a **User Profile** from under the User Classification section drop-down list if desired. 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.
5. Select the **Department** from the drop-down list.
6. Select the **Phone Number** from the drop-down list. The **Extension** field fills in automatically if a User Profile has been selected.
7. **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.
8. 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.
9. You can click **View Phone Template** to view the template for the primary phone.
10. Enter the **Phone Location** (Optional data for E911 Emergency services).
11. 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.
12. 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.
13. Enter the **Voice Portal Passcode**. It is typically 4-8 digits in length, to be determined by the administrator. Valid characters are 0-9.
14. Enter the **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 desired.

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
- Mitel Support–checked if this user is for Mitel Support 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**
- Authentication Name and Password–required if this user is assigned a device that uses authentication

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

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. **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.

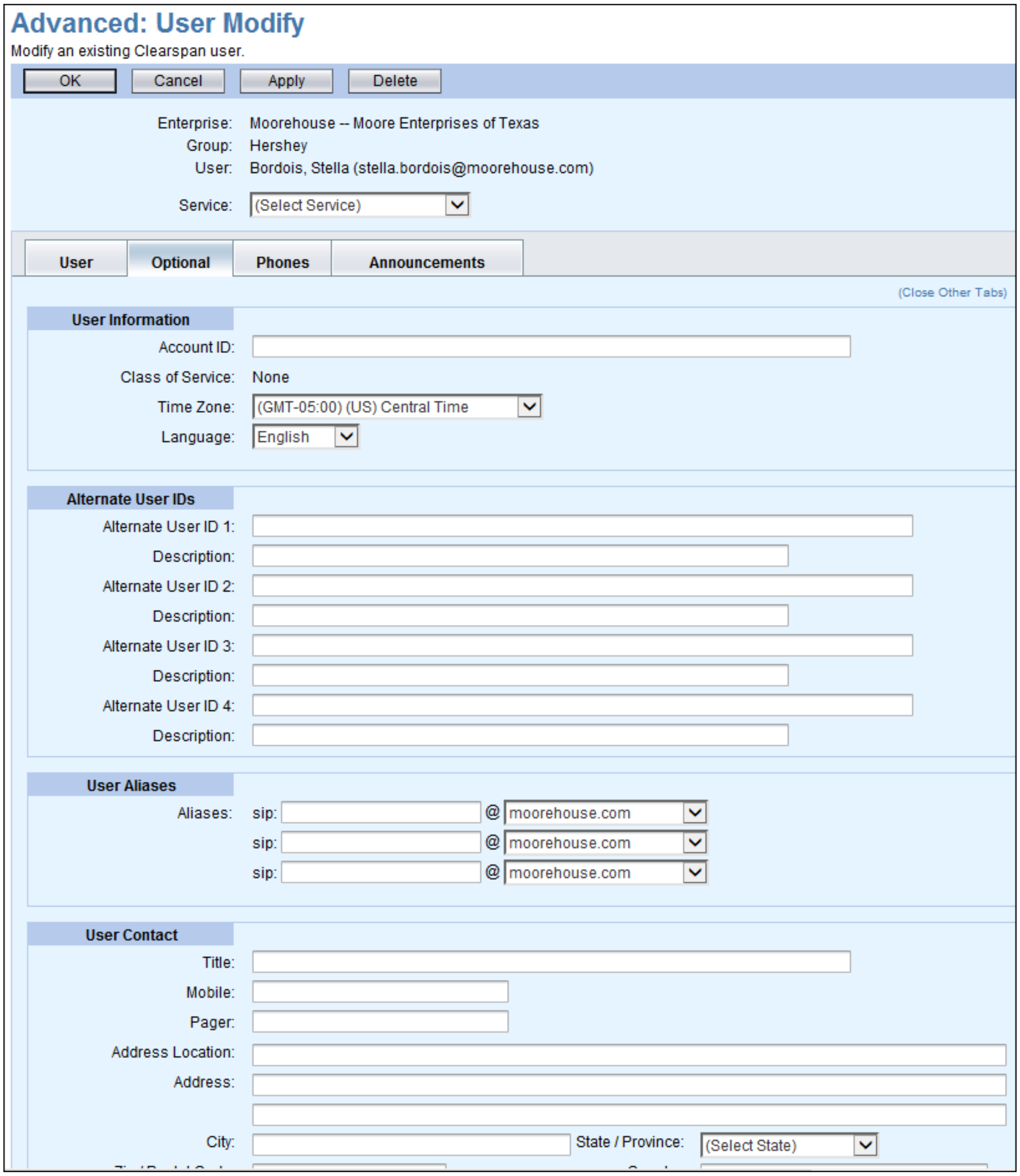


Figure 53 Advanced: User Add Page – Optional Tab

Phones Tab

Click on 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.

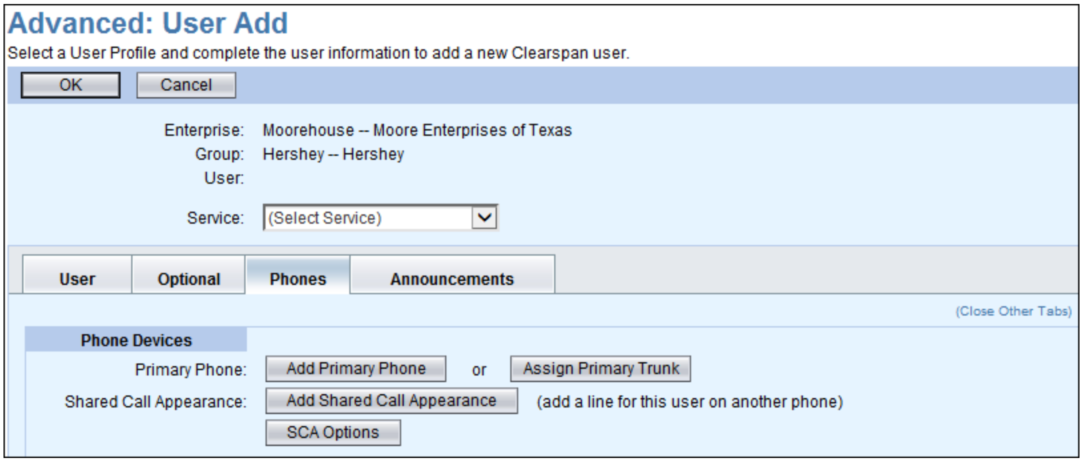


Figure 54 Advanced: Alternate User Add Phones Tab

- **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 displays.
2. Select the **Enterprise** and **Group** from the drop-down list, if necessary.
3. Click **Search**.
4. Click the **Edit** link at the end of the user's row.
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 displays.

   The **Unassign** button removes the phone device from this user without deleting it. The **Delete** button deletes this phone device from the Clearspan system. The Delete 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.

7. 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** contains 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.

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

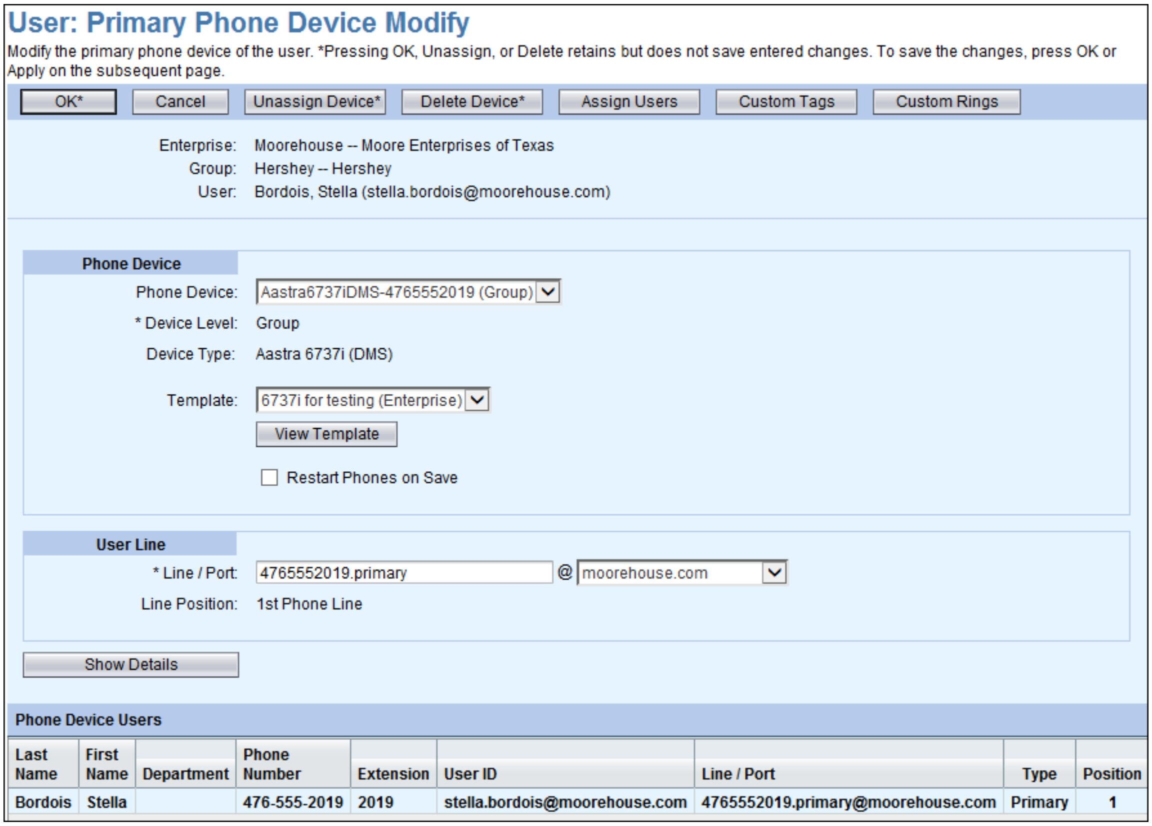
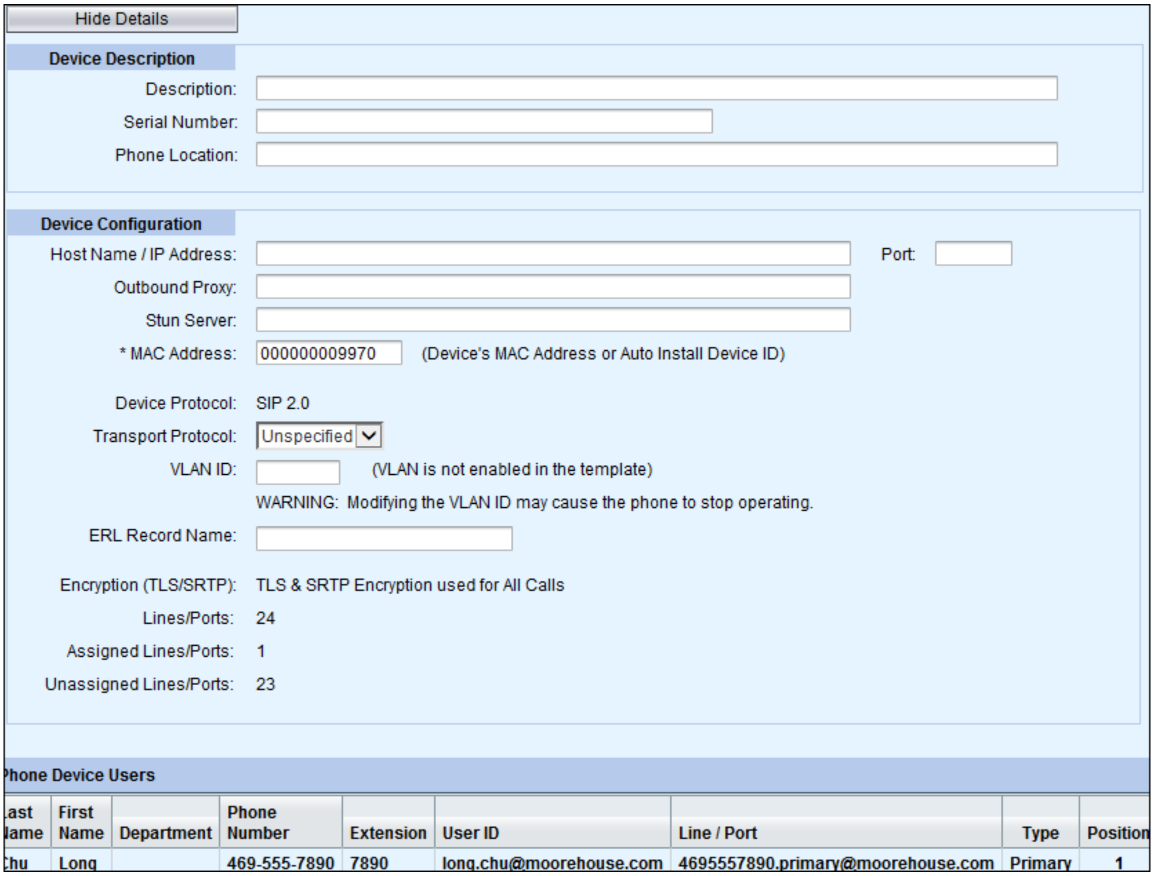


Figure 55 User: Primary Phone Device Modify Page

11. If desired, click **Show Details** and change values for any of the remaining fields as described in the following illustration.



12. 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 displays.
2. Select the **Enterprise** and **Group** from the drop-down list, if necessary.
3. Click **Search**.
4. Click the **Edit** link at the end of the user's row.
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 displays.

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** contains a list of devices that match the search criteria.

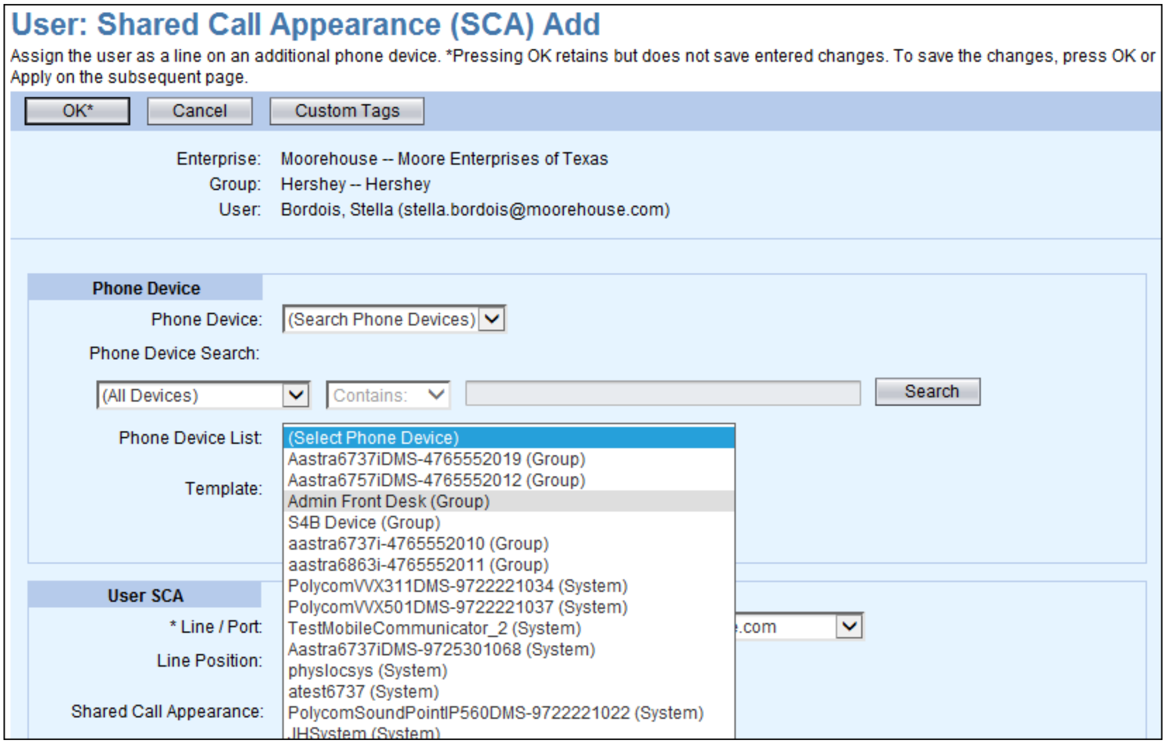


Figure 56 User: SCA Add Page – Phone Device List

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

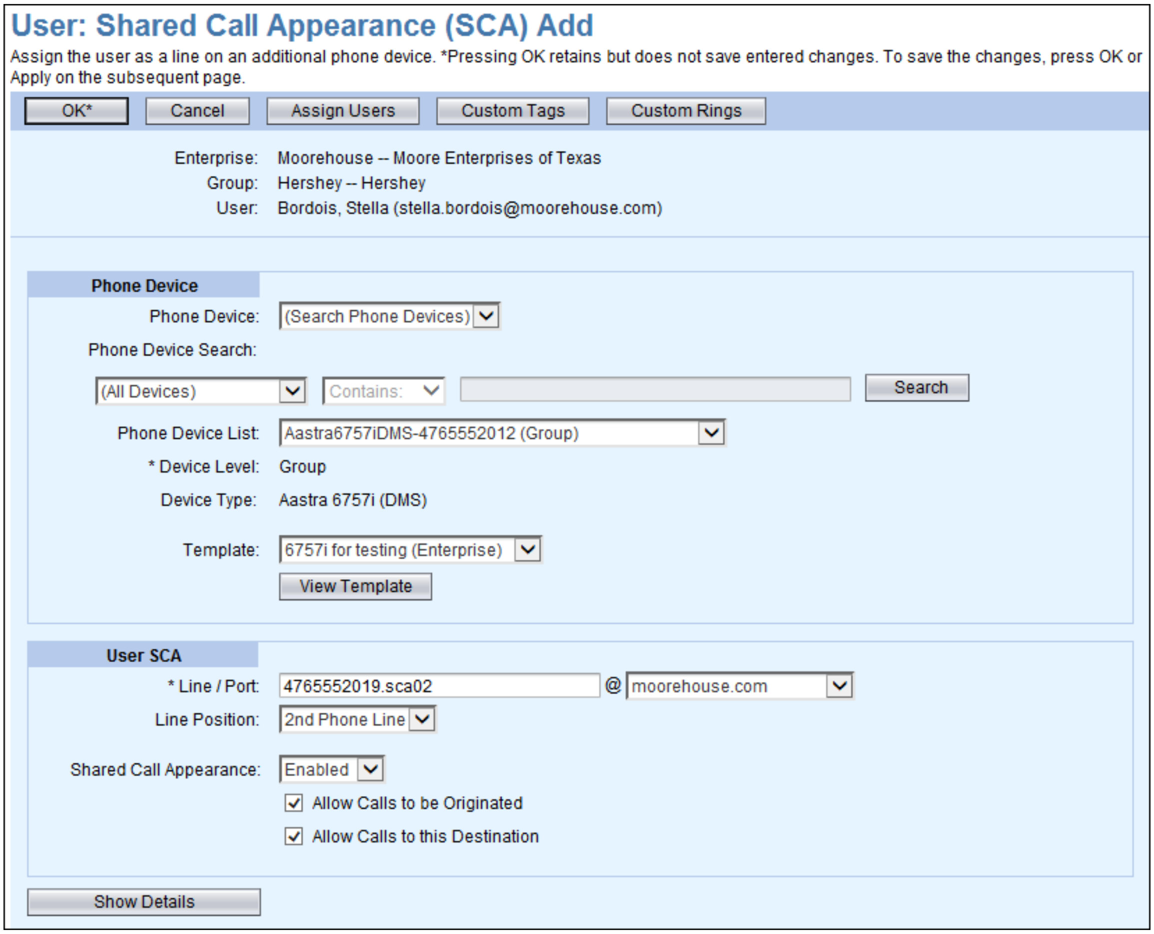


Figure 57 User: Shared Call Appearance (SCA) Add Page

9. 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 Re-ordering 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 don’t want calls to be originated from or terminated 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

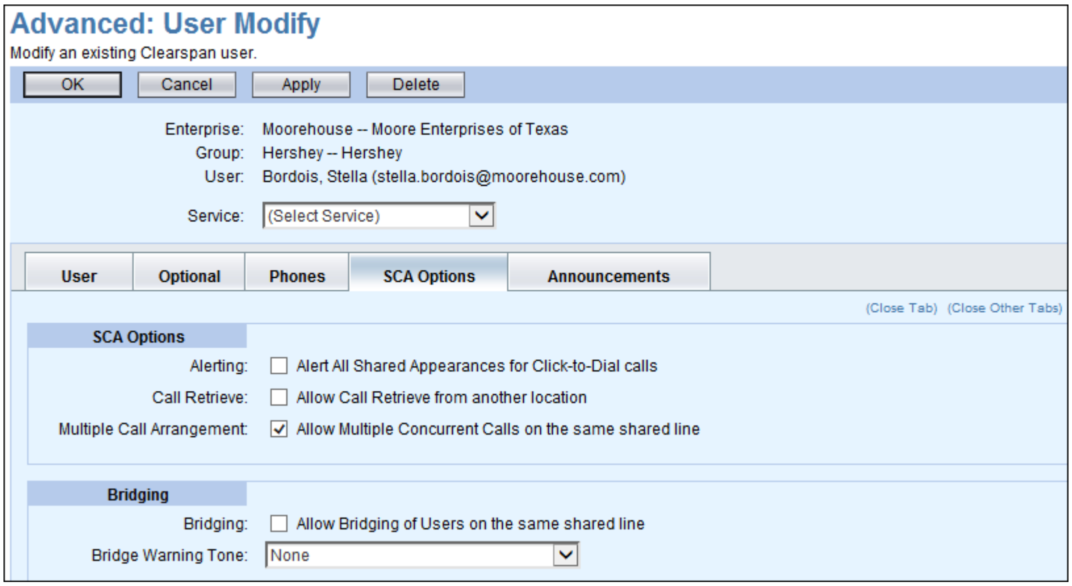


Figure 58 Advanced: User Modify Page – SCA Options Tab

16. Check **Allow Bridging of Users on the same shared line**, if desired.
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**.

Removing a Shared Call Appearance

1. From the main menu, select **Provisioning** and then **Users**. The Users page displays.
2. Select the **Enterprise** and **Group** from the drop-down list, if necessary.
3. Click **Search**.
4. Click the **Edit** link at the end of the user's row.
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.

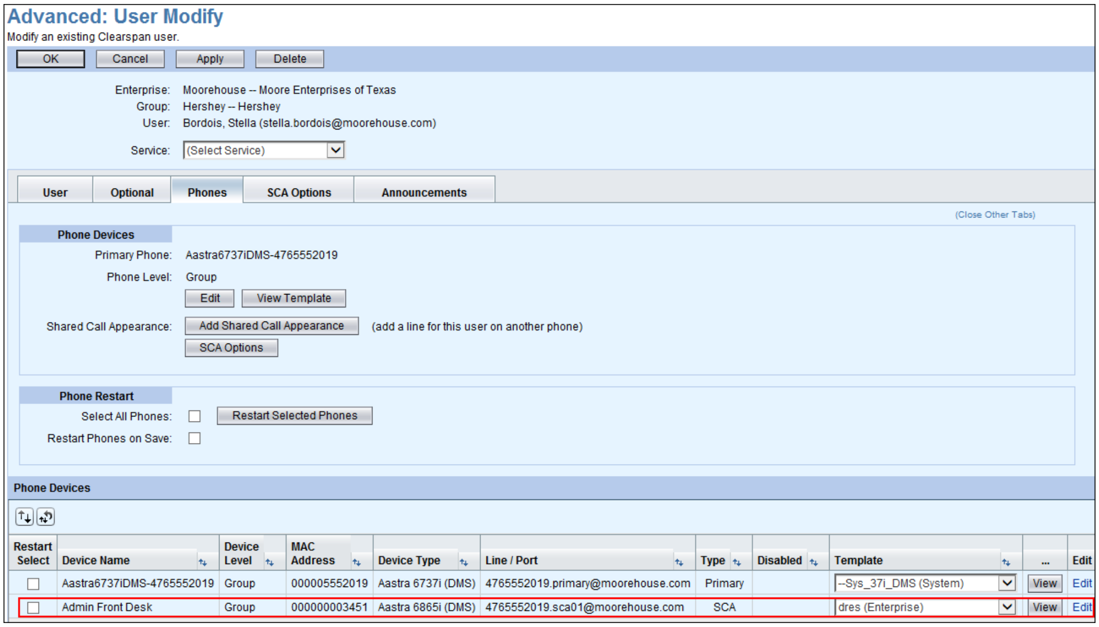


Figure 59 Advanced: User Modify Page – SCA to Remove

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.

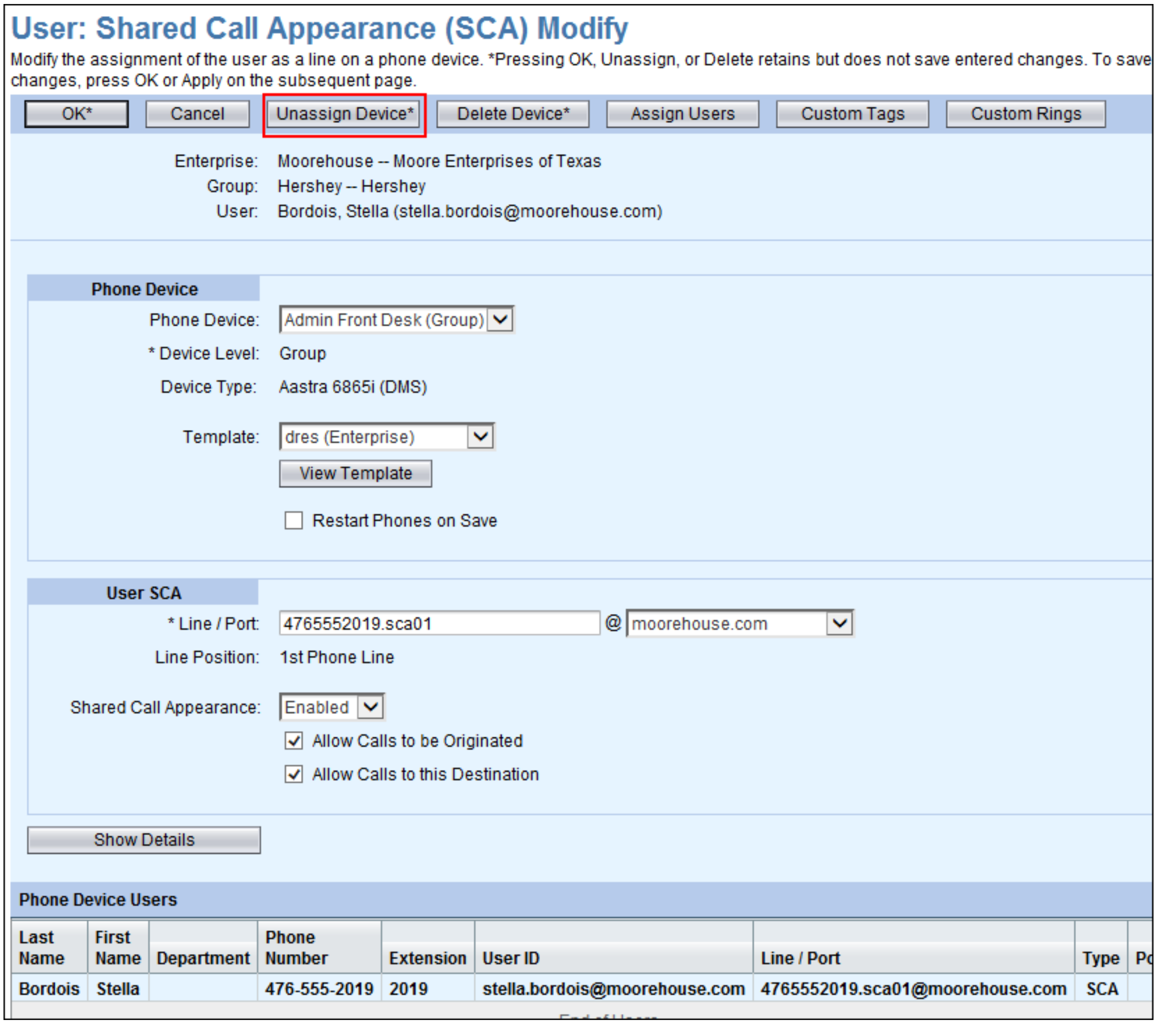


Figure 60 Unassign a Shared Call Appearance from a Phone Device

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 displays.
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**.

> **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 displays.

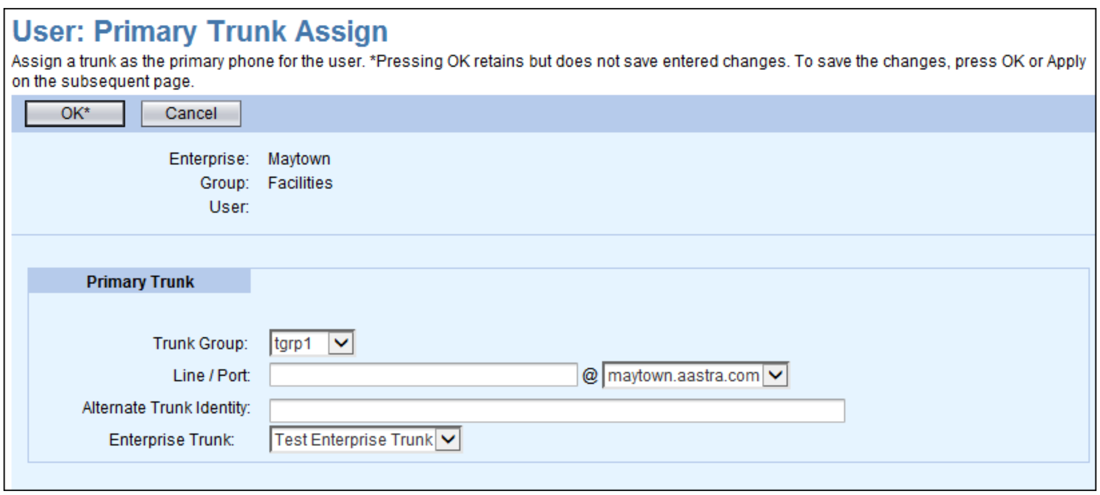


Figure 61 User: Primary Trunk Assign Page

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 desired. 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 displays.
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 displays.
2. Select the **Enterprise** and **Group** from the drop-down list, if necessary.
3. Click **Search**.
4. Click the **Edit** link in the row of the user for which you want to configure Announcements. The Advanced: User Modify page displays.
5. Select the **Announcements** tab.

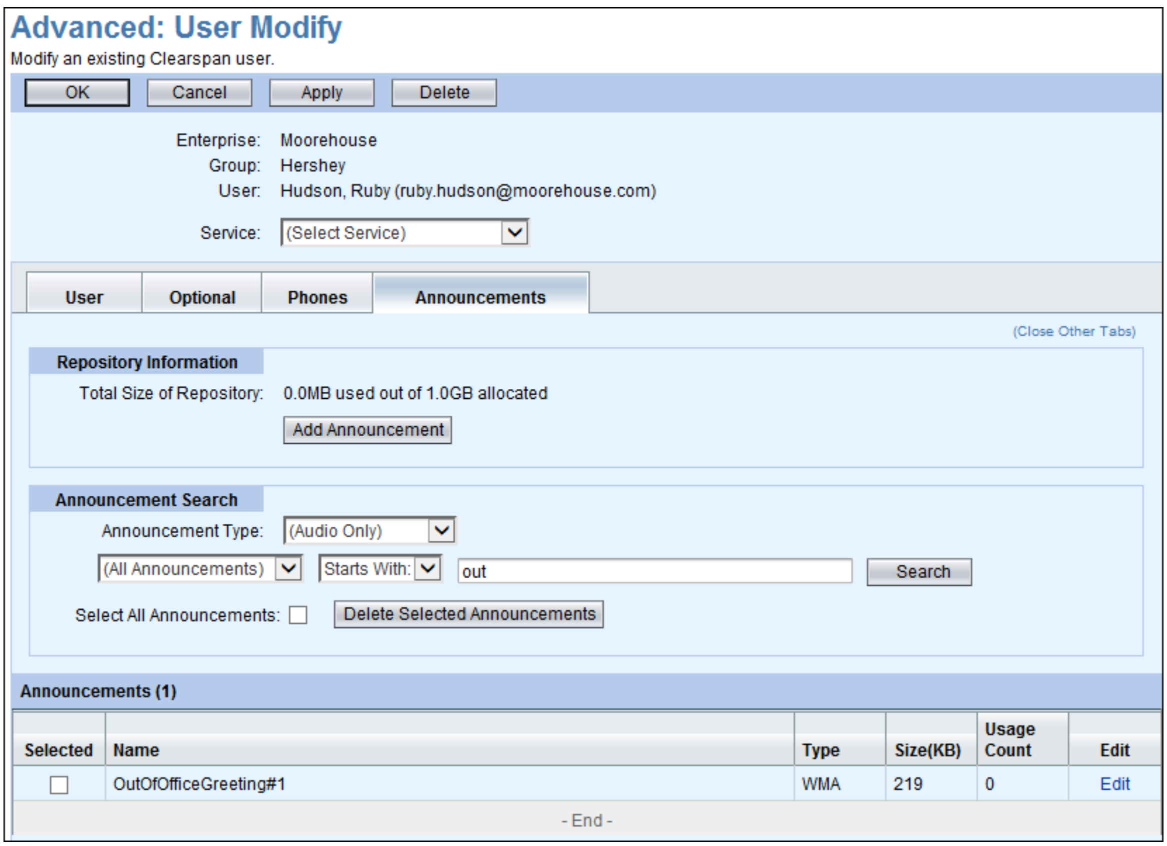


Figure 62 Advanced: User Modify Page – Announcements Tab

- 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.

- 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**.
- 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.

6. 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 63. Failures are also reported on the User Add Messages page.

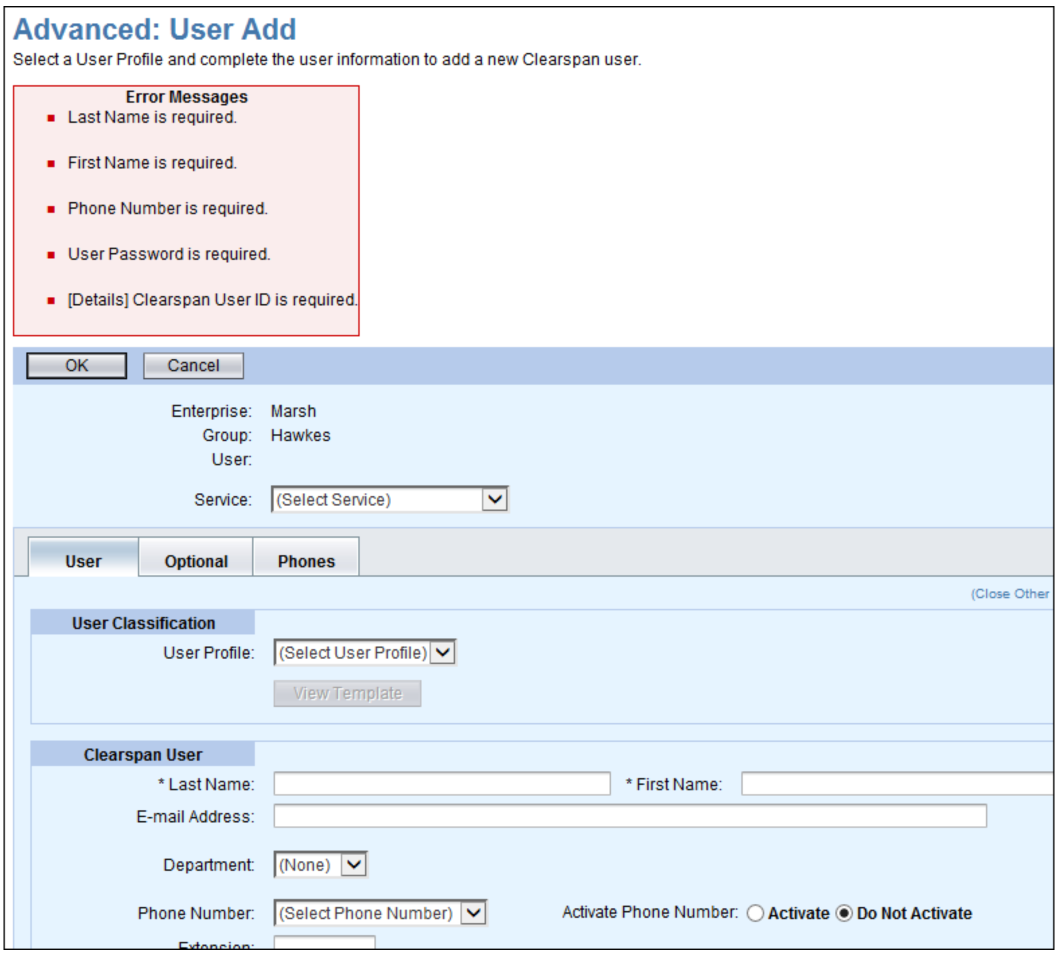


Figure 63 User Add Error Messages

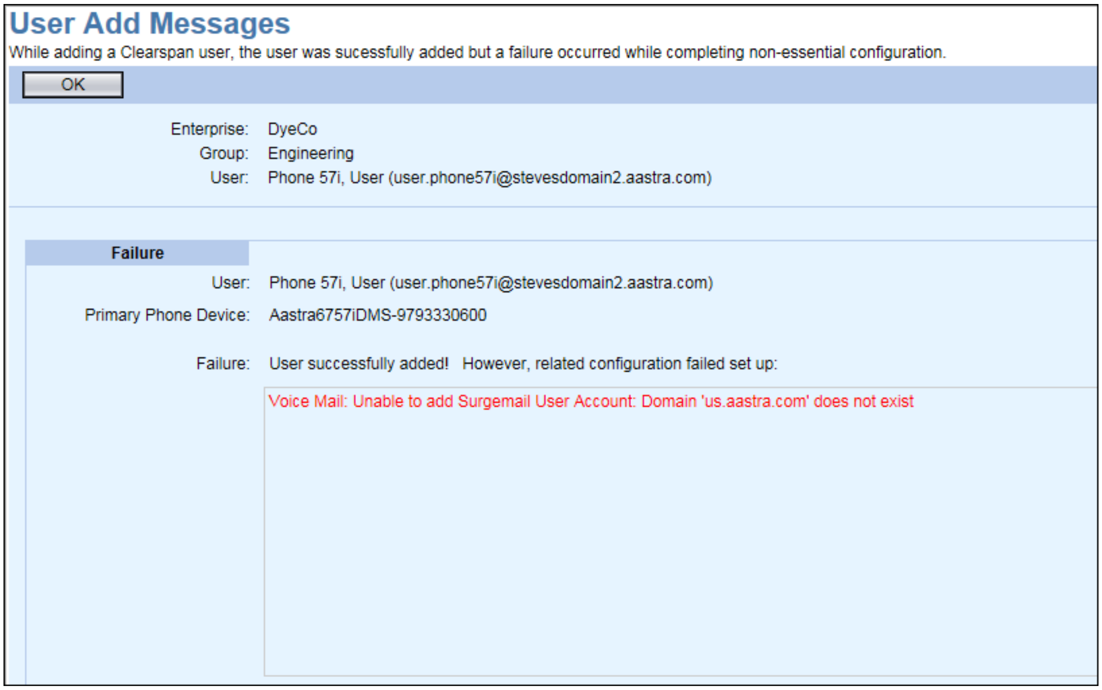


Figure 64 User Add Failure Page

CONFIGURING ADVANCED USER FEATURES

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

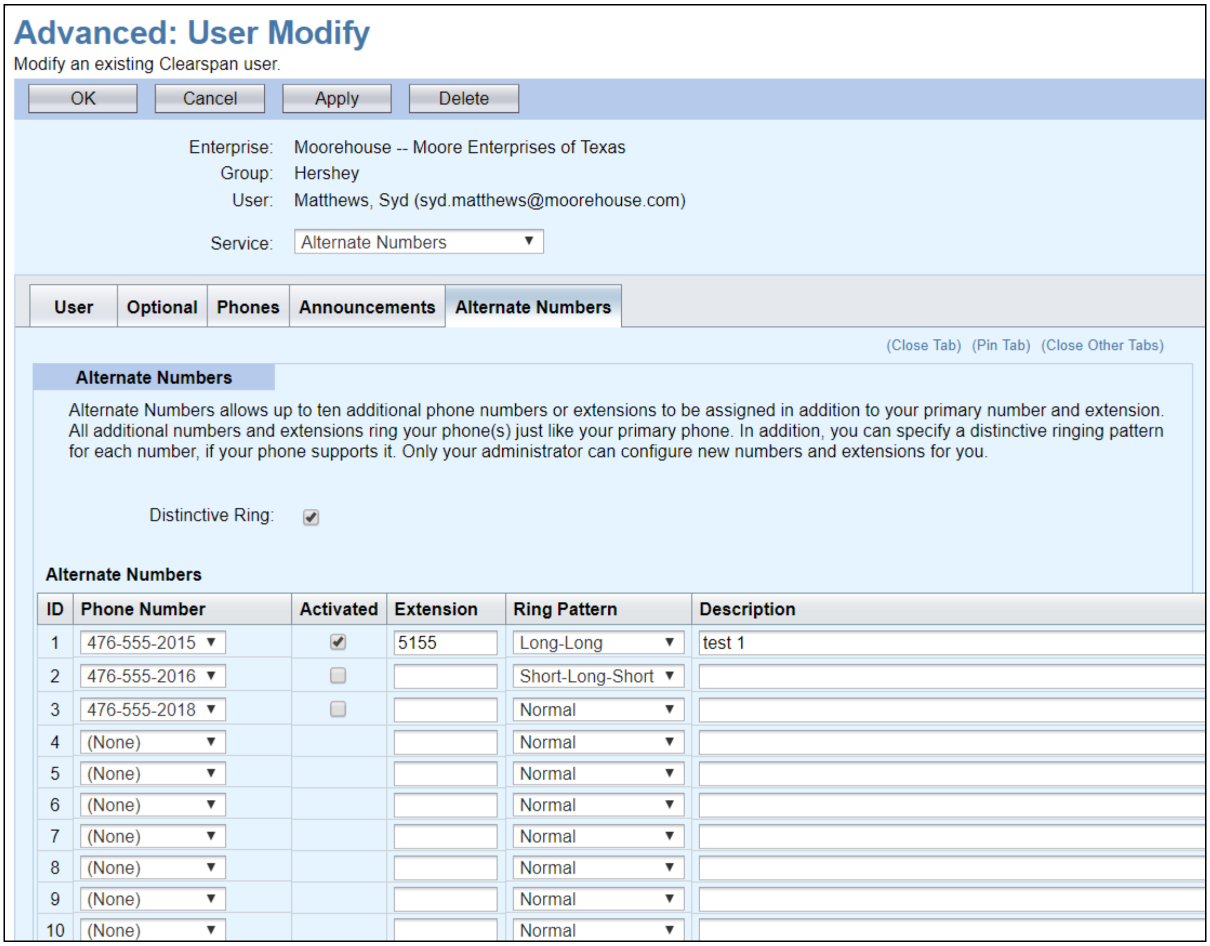
- Alternate Numbers
- Authorization Codes
- Busy Lamp Field (BLF)
- Call Center Agent
- Call Center Supervisor
- Call Forward
- Call Forward Selective
- Call Pickup
- Call Recording
- Fax Messaging
- Flexible Seating Guest
- Hoteling Guest
- Hoteling Host
- Hunt Group

- Integrated IM&P
- Music On Hold
- Priority Alert
- Privacy
- 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 displays.
2. Select the **Enterprise** and **Group** from the drop-down list, if necessary.
3. Click **Search**.
4. Click the **Edit** link in the row of the user for which you want to set up alternate numbers. The **Advanced: User Modify** page displays.
5. Select **Alternate Numbers** from the **Service** Drop-down list. The **Alternate Numbers** tab displays as in the following example:



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:

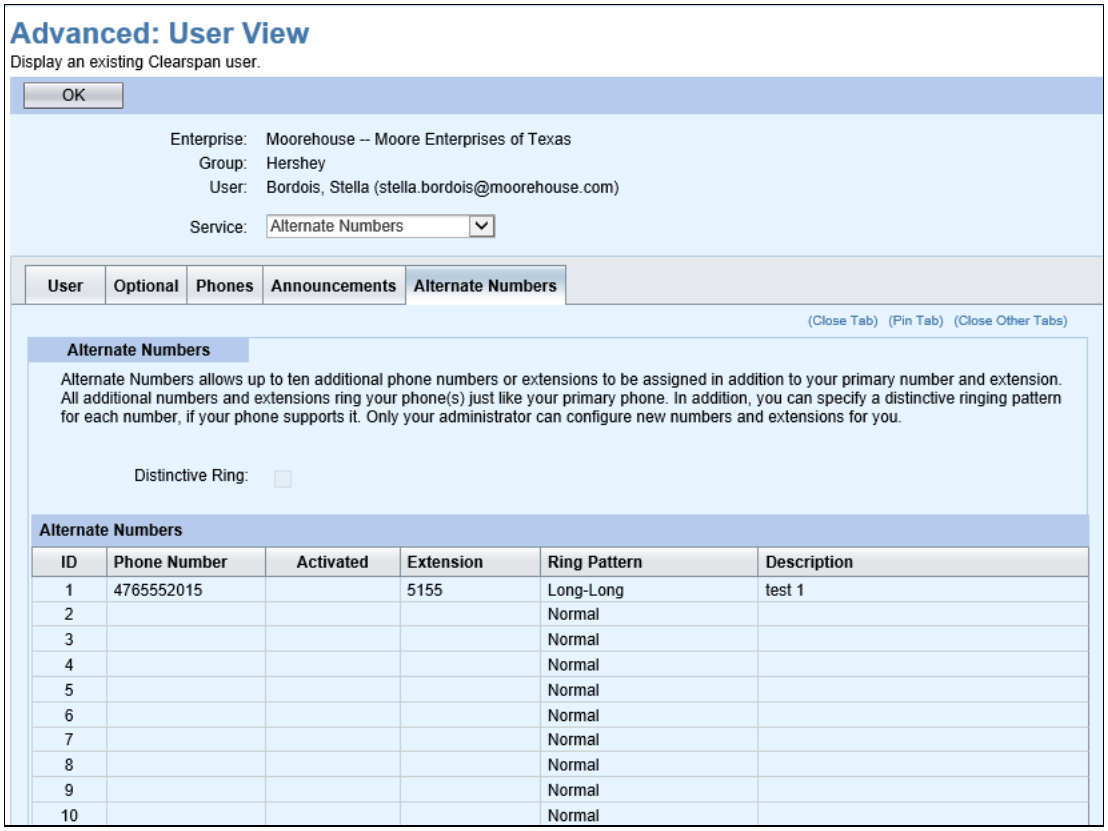
a) From the main menu, select **Provisioning** and then **Users**. The **Users** page displays.

b) Select the **Enterprise** and **Group** from the drop-down list, if necessary.

c) Click **Search**.

d) Click the **View** link in the row of the user to view the alternate numbers. The **Advanced: User View** page displays.

e) Select **Alternate Numbers** from the **Service** drop-down list. The **Alternate Numbers** tab displays as in the following example:



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 displays.
2. Select the **Enterprise** and **Group** from the drop-down list, if necessary.
3. Click **Search**.
4. Click the **Edit** link in the row of the user 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 displays as in the following example.

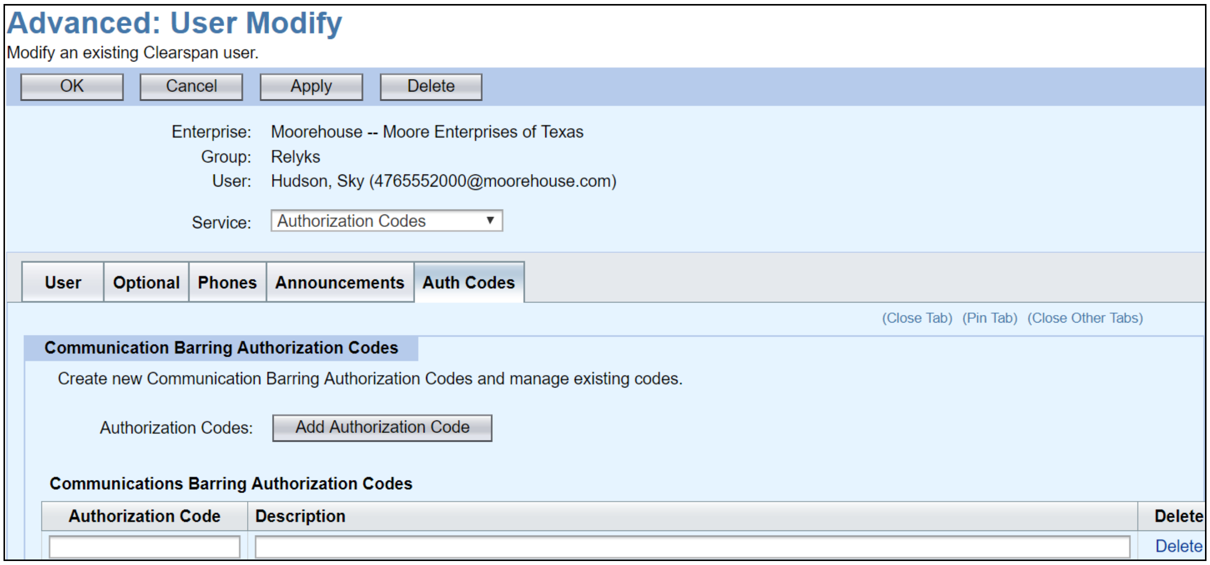


Figure 65 Advanced: User Modify Page – Auth Codes Tab

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 displays.
2. Select the **Enterprise** and **Group** from the drop-down list, if necessary.
3. Click **Search**.
4. Click the **Edit** link in the row of the user that will be allowed to monitor other users’ phone status. The Advanced: User Modify page displays.
5. Select **Busy Lamp Field (BLF)** from the **Service** drop-down list. The BLF tab displays as in the following example.

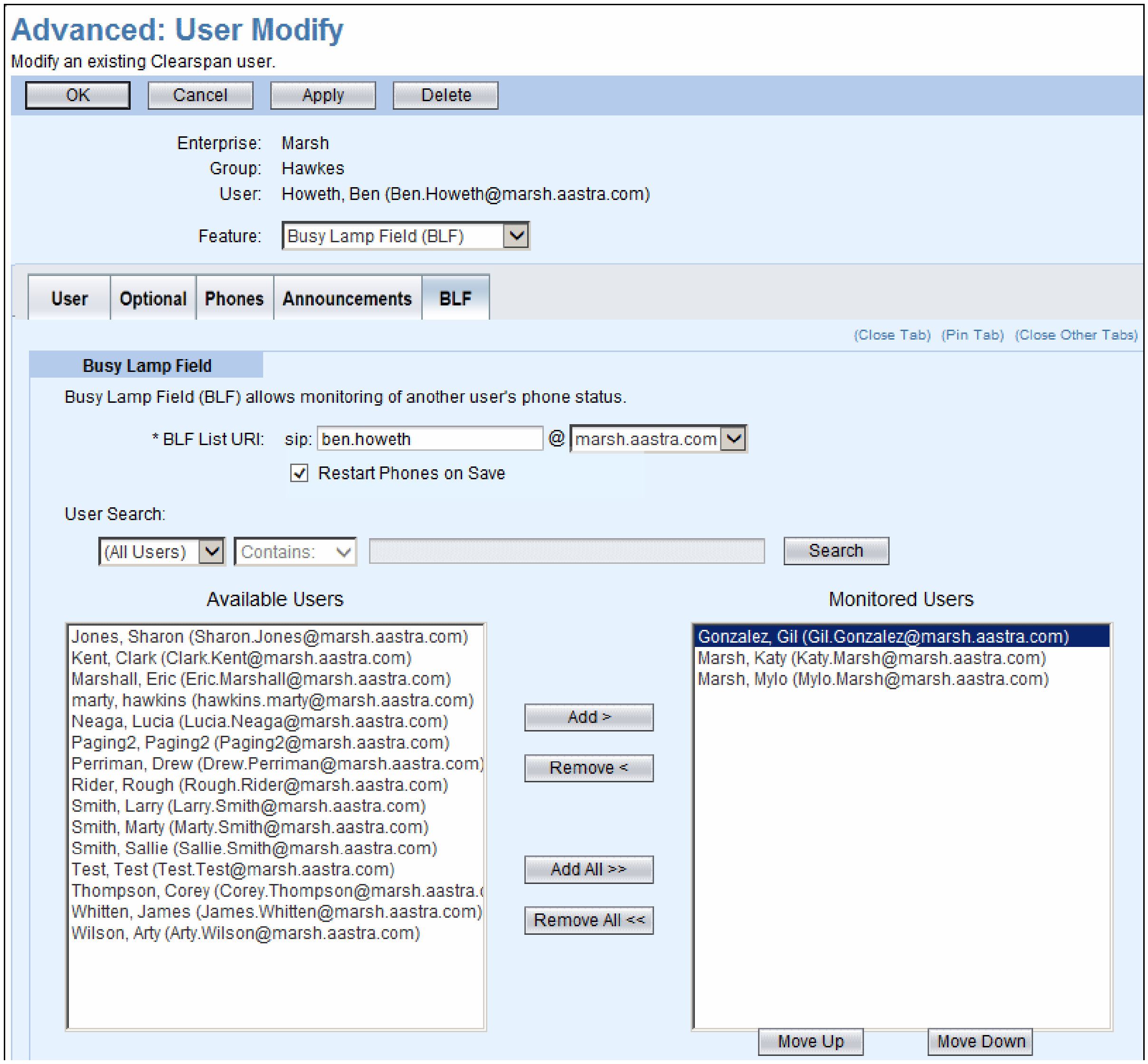


Figure 66 Advanced: User Modify Page - BLF Tab

6. Enter the BLF List URI, i.e., 9785551003BLF@marsh.mitel.com. This name MUST be unique. You can choose any name, but it cannot be duplicated elsewhere in the system.
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 Shift+Click to select specific users.
9. 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 BLFs 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 join or remove users from the ACD call center.

1. From the main menu, select **Provisioning** and then **Users**. The Users page displays.
2. Select the **Enterprise** and **Group** from the drop-down list, if necessary.
3. Click **Search**.
4. Click the **Edit** link in the row of the user that will be allowed to monitor other users' phone status. The Advanced: User Modify page displays.
5. Select **Call Center Agent** from the **Service** drop-down list. The Call Center Agent tab displays as in the following example.

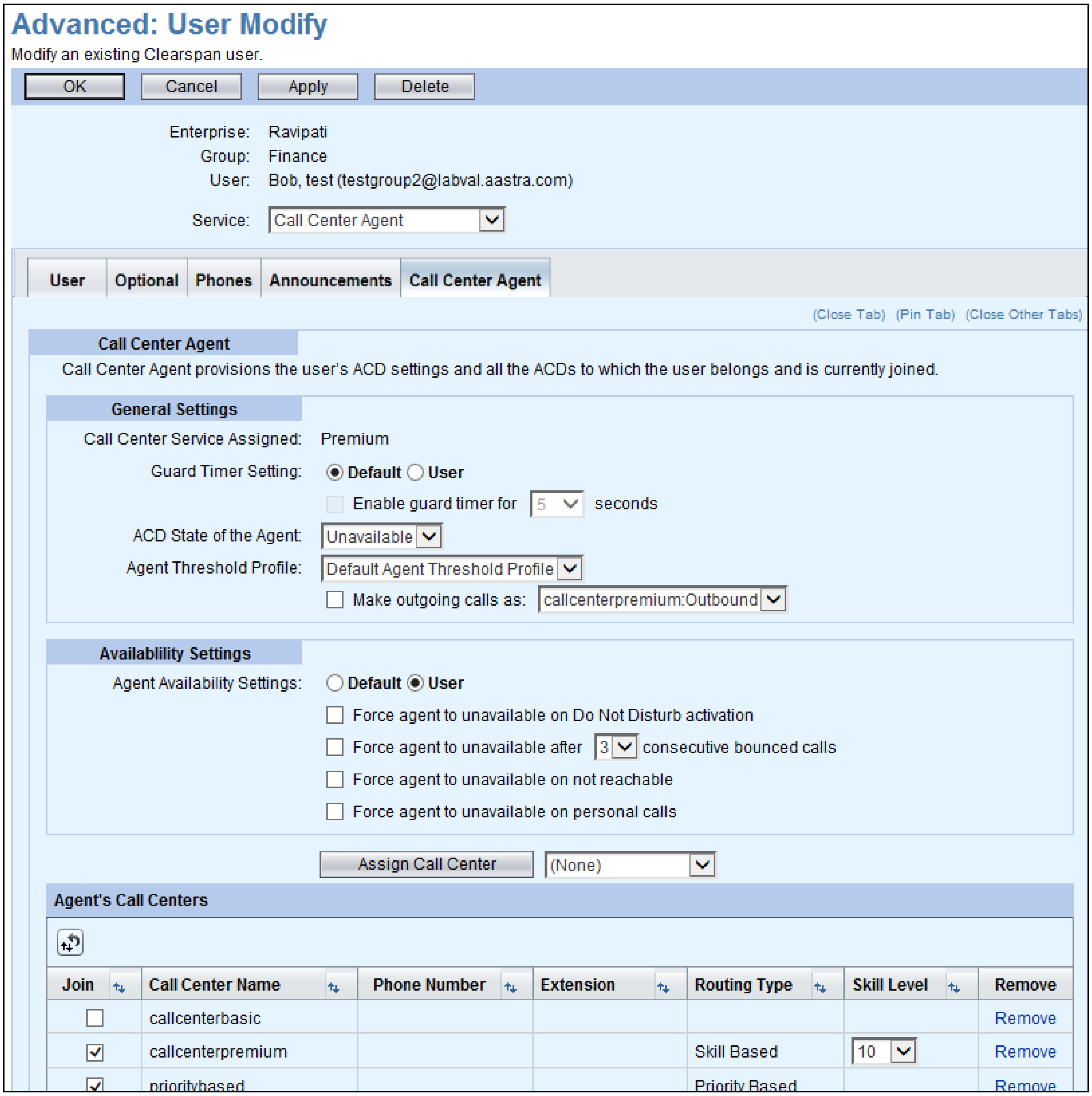


Figure 67 Advanced: User Modify Page – Call Center Agent Tab

6. Select the agent's **Guard Timer Setting**. **Default** uses the default settings. **User** 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 in order 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.
10. 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. Uncheck **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 displays.
2. Select the **Enterprise** and **Group** from the drop-down list, if necessary.
3. Click **Search**.
4. Click the **Edit** link in the row of the user that will be allowed to monitor other users' phone status. The Advanced: User Modify page displays.
5. Select **Call Center Supervisor** from the **Service** drop-down list. The Call Center Supervisor tab displays.

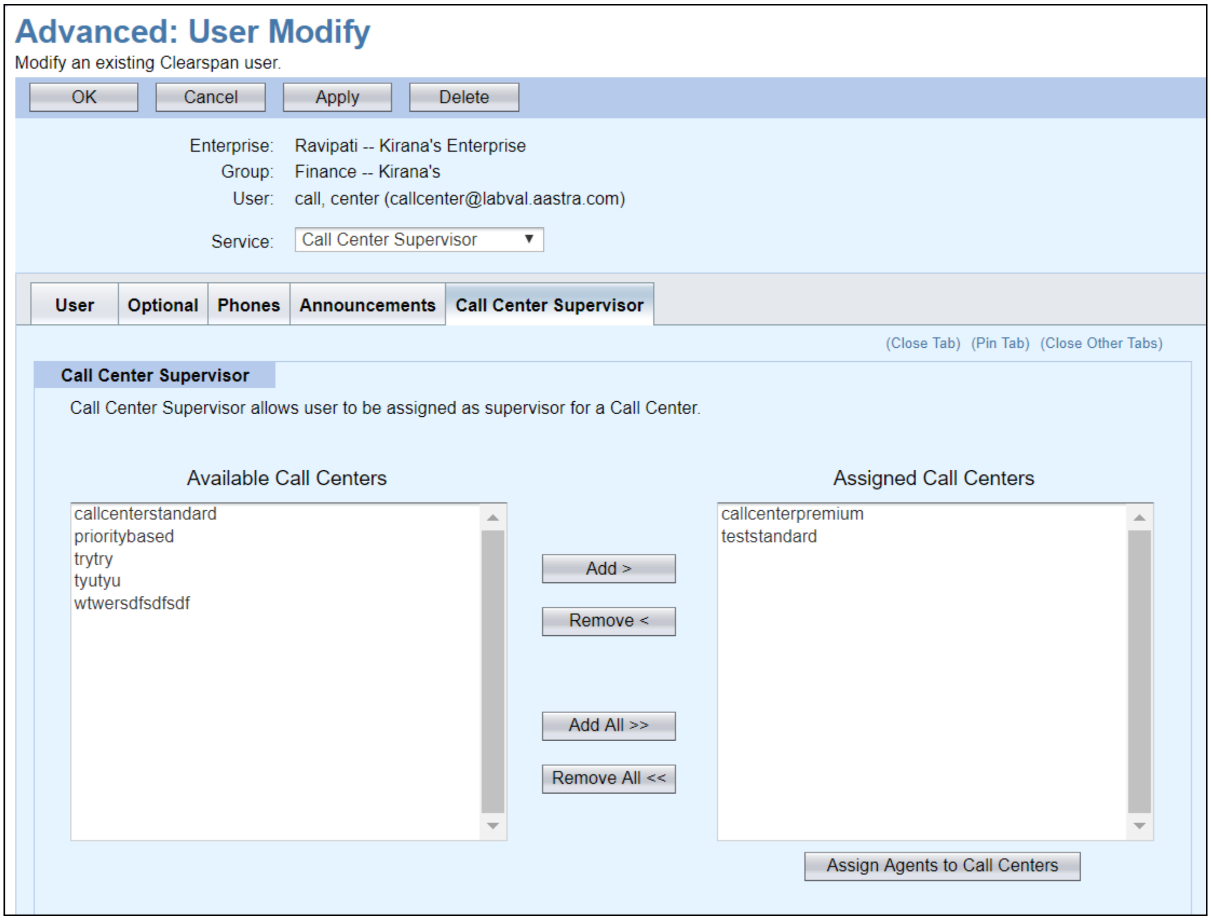


Figure 68 Advanced: User Modify Page – Call Center Supervisor Tab

6. Use **Add** and **Remove** to assign available supervisors to a call center.

7. Click **OK** or **Apply**.

Call Forward

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 displays.

2. Select the **Enterprise** and **Group** from the drop-down list, if necessary.

3. Click **Search**.

4. Click the **Edit** link in the row of the user for which you want to set up call forwarding. The Advanced: User Modify page displays.

5. Select **Call Forward** from the **Service** Drop-down list. The Call Forward tab displays as in the following example.

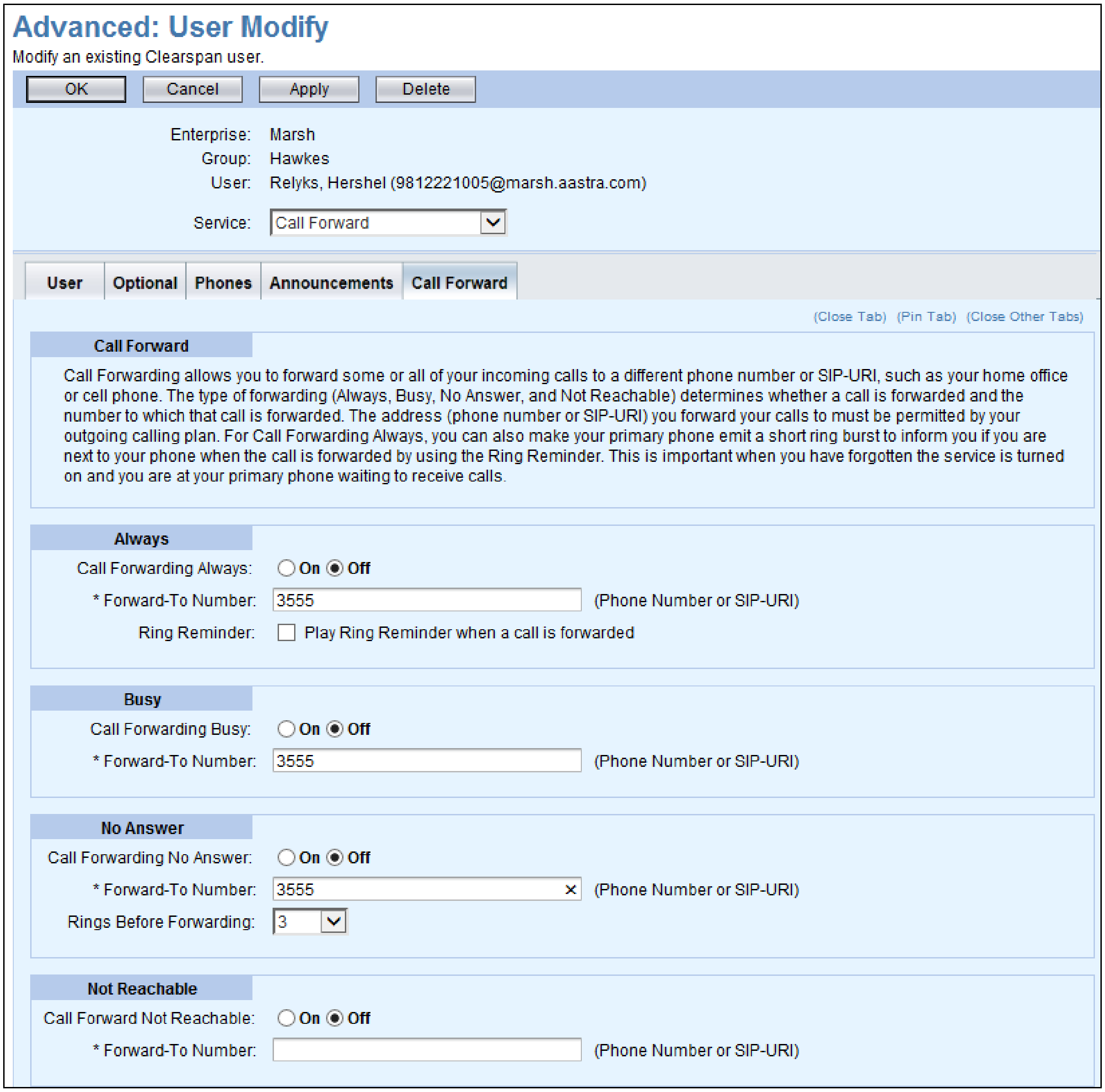


Figure 69 Advanced: User Modify Page – Call Forward Tab

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. Check 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

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 displays.
2. Select the **Enterprise** and **Group** from the drop-down list, if necessary.
3. Click **Search**.
4. Click the **Edit** link in the row of the user for which you want to set up call forwarding. The Advanced: User Modify page displays.
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. Check 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 list to modify or delete existing criteria. The User: Call Forwarding Selective page displays.
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. 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 displays.
2. Select the **Enterprise** and **Group** from the drop-down list, if necessary.
3. Click **Search**.
4. Click the **Edit** link in the row of the user for which you want to set up call pickup. The Advanced: User Modify page displays.
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**.

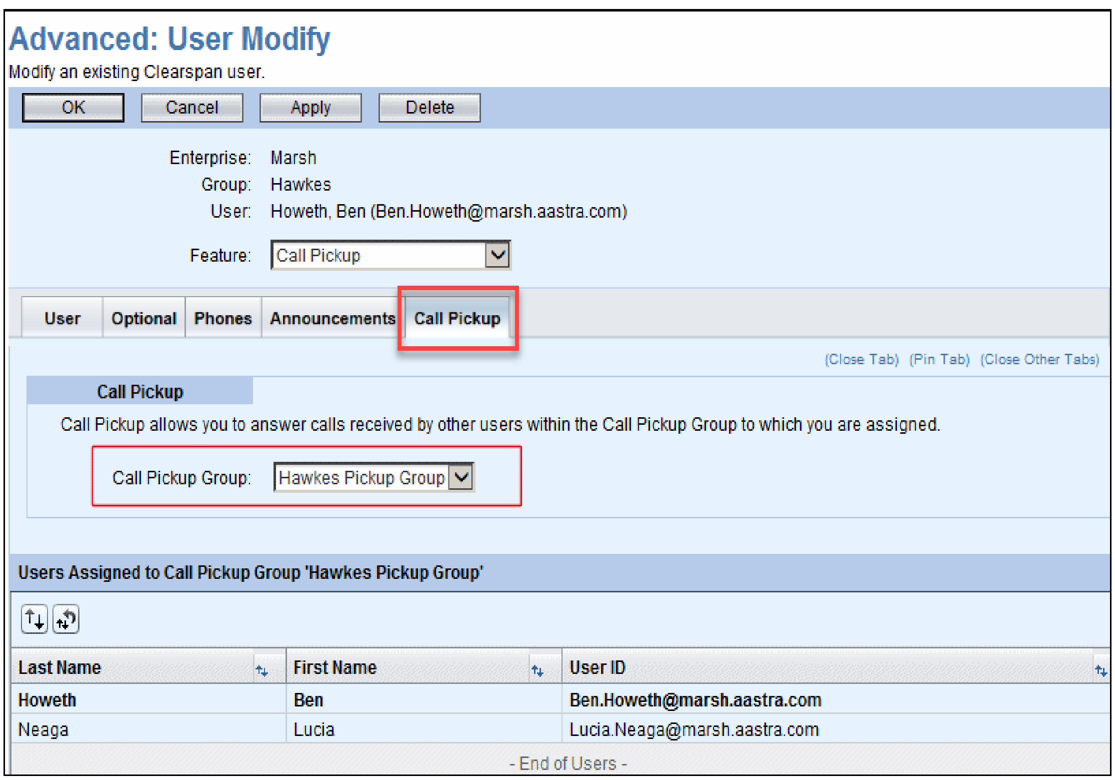


Figure 70 Advanced: User Modify Page – Call Pickup Tab

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 displays.
2. Select the **Enterprise** and **Group** from the drop-down list, if necessary.
3. Click **Search**.
4. Click the **Edit** link in the row of the user for which you want to set up call recording. The Advanced: User Modify page displays.
5. Select **Call Recording** from the **Service** Drop-down list.

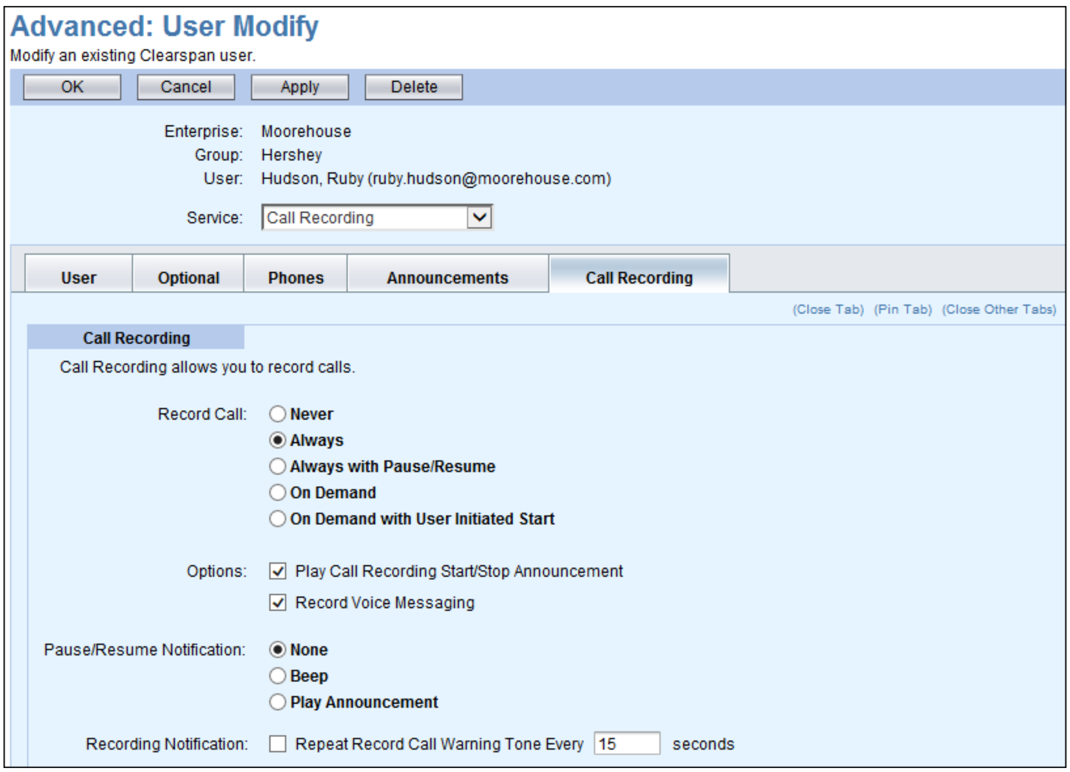


Figure 71 Advanced: User Modify Page – Call Recording Tab

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**.

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 displays.
2. Select the **Enterprise** and **Group** from the drop-down list, if necessary.
3. Click **Search**.
4. Click the **Edit** link in the row of the user for which you want to set up fax messaging. The Advanced: User Modify page displays.
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 may not be sent over secure E-mail.

12. Click **OK** or **Apply**.

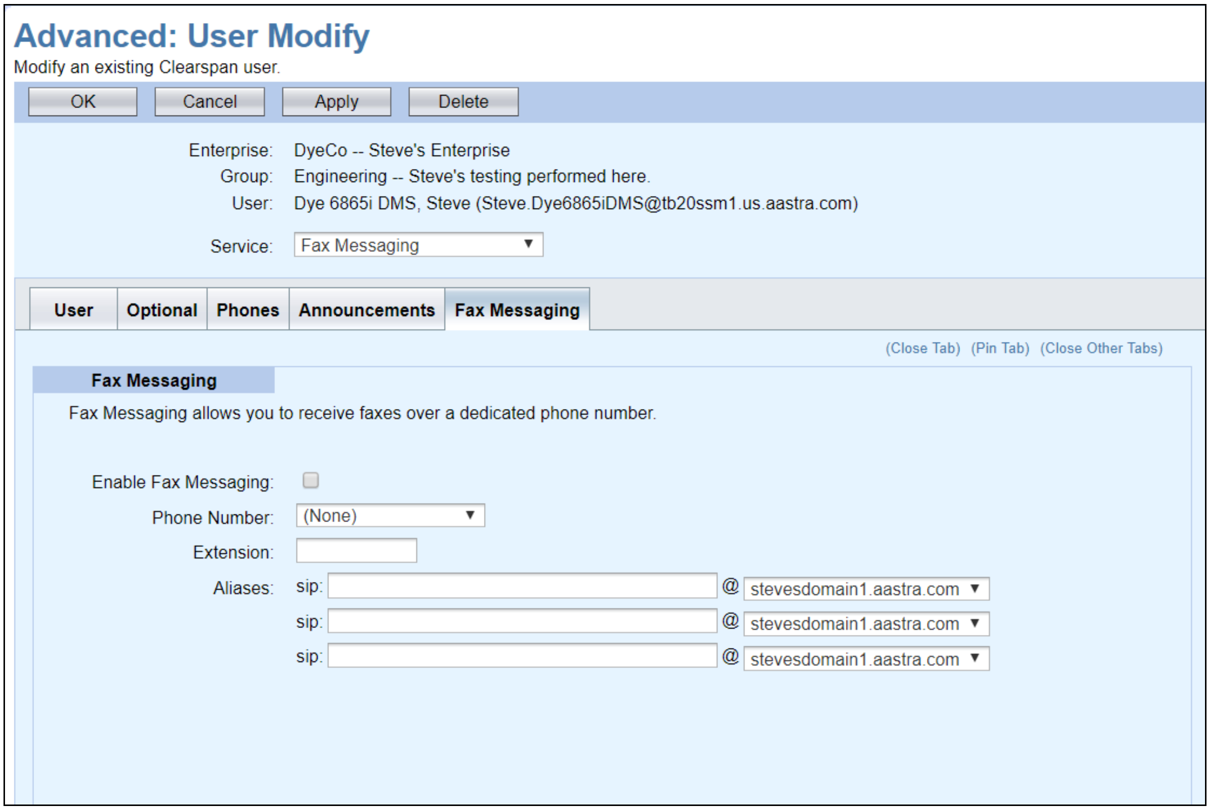


Figure 72 Advanced: User Modify Page – Fax Messaging Tab

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 on page 130.
2. Then, from the main menu, select **Provisioning** and then **Users**. The Users page displays.
3. Select the **Enterprise** and **Group** from the drop-down list, if necessary.
4. Click **Search**.
5. Click the **Edit** link in the row of the user who will be the Flexible Seating Guest. The Advanced: User Modify page displays.
6. Select **Flexible Seating Guest** from the **Service** drop-down list.

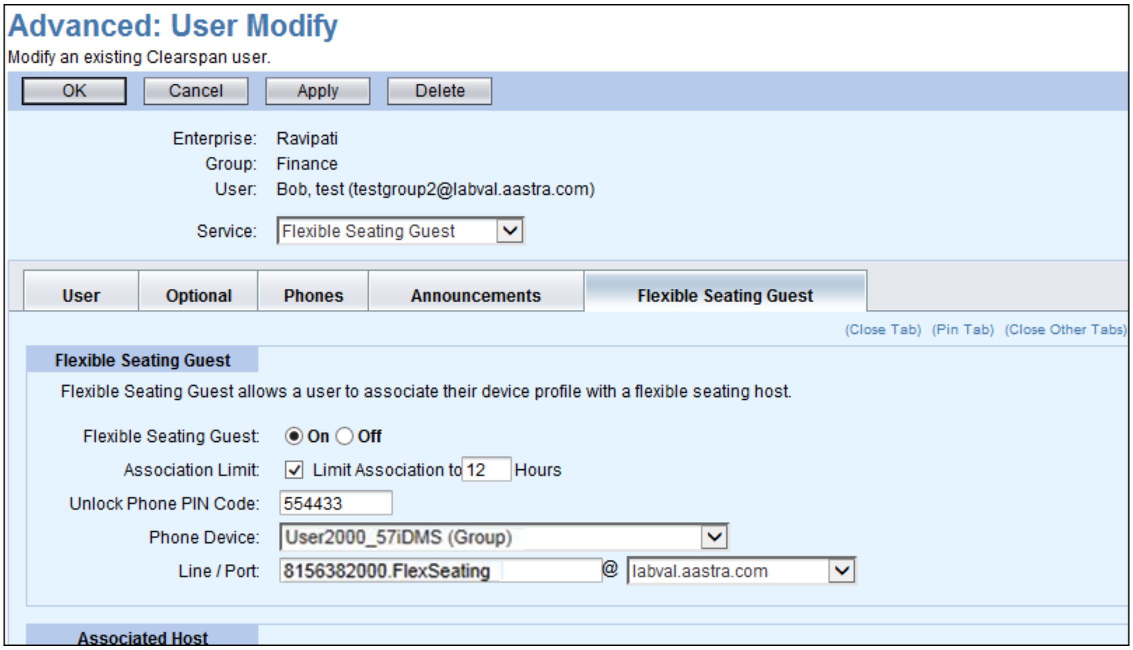


Figure 73 Advanced: User Modify – Flexible Seating Guest Tab

7. Select **On** to enable this user as a Flexible Seating Guest.
8. Select the **Association Limit** checkbox, 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 desired 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 see 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 desired host from the Available Hosts list and click **Assoicate 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.

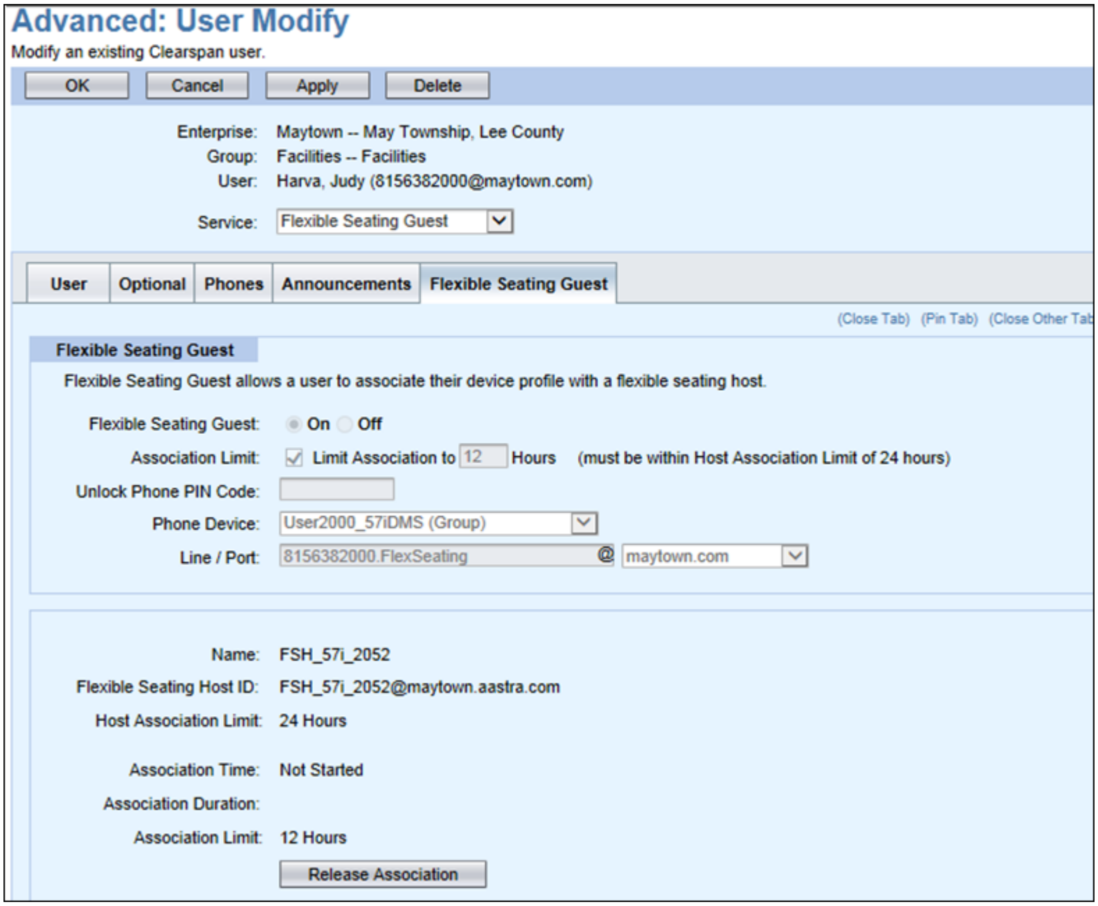


Figure 74 Advanced: User Modify – Flexible Seating Guest Tab with Host Association

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 displays.
2. Select the **Enterprise** and **Group** from the drop-down list, if necessary.
3. Click **Search**.
4. Click the **Edit** link in the row of the user who will be the Hoteling Guest. The Advanced: User Modify page displays.
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 displays over the OK button. The Advanced: User Modify page displays again with the **Guest** and **Host** association displayed.
11. Click **OK**. The Users page displays.

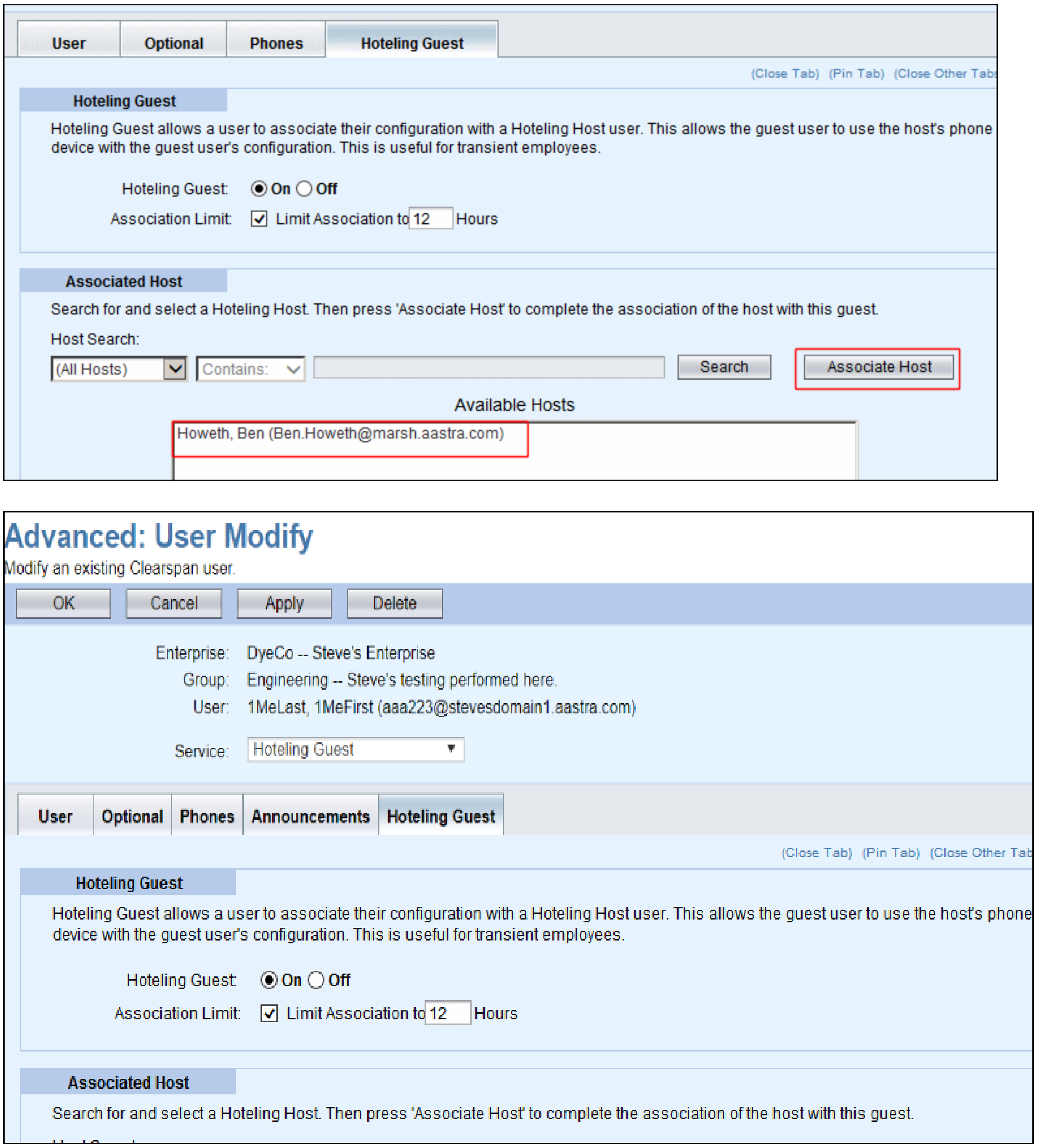


Figure 75 Advanced: User Modify – Hoteling Guest Tab

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.

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 displays.

2. Select the **Enterprise** and **Group** from the drop-down list, if necessary.
3. Click **Search**.
4. Click the **Edit** link in the row of the user who will be the Hoteling Host. The Advanced: User Modify page displays.
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**.

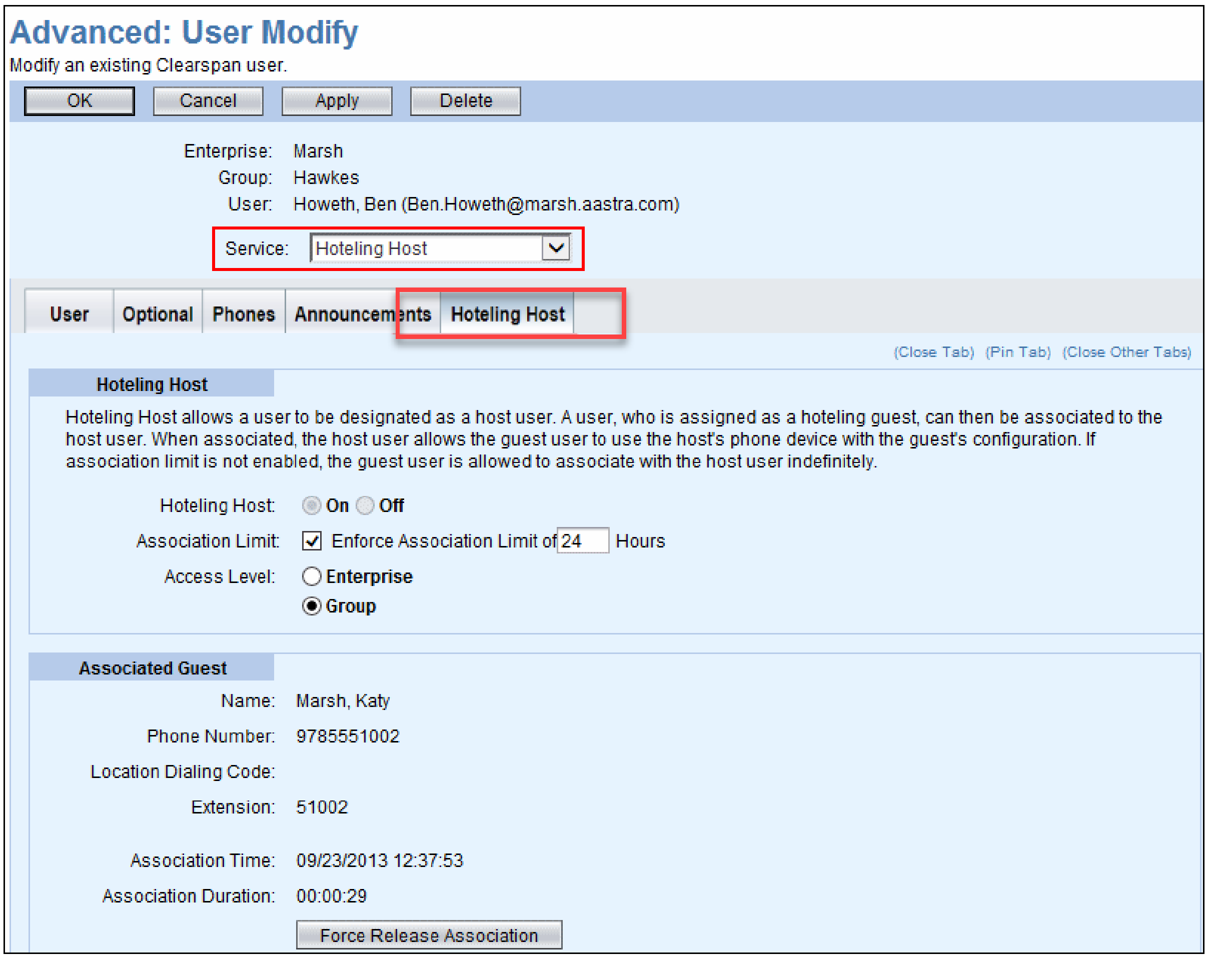


Figure 76 Advanced: User Modify – Hoteling Host Tab

To release the Hoteling association:

1. From the main menu, select **Provisioning** and then **Users**. The Users page displays.
2. Select the **Enterprise** and **Group** from the drop-down list, if necessary.
3. Click **Search**.

4. Click the **Edit** link in the row of the user who is the Hoteling Guest. The Advanced: User Modify page displays.
5. Select **Hoteling Guest** from the **Service** drop-down list. The Hoteling Guest tab displays.
6. Click **Force Release Association** to release the Host/Guest association.

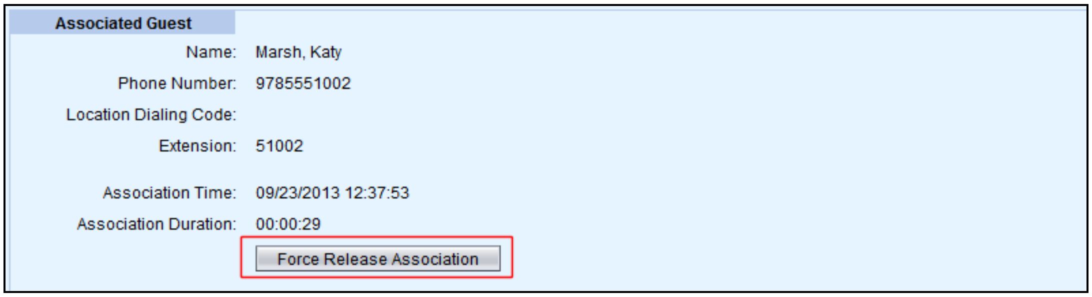


Figure 77 Advanced: User Modify – Host and Guest Association

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 displays.
2. Select the **Enterprise** and **Group** from the drop-down list, if necessary.
3. Click **Search**.
4. Click the **Edit** link in the row of the user that will be allowed to monitor other users' phone status. The Advanced: User Modify page displays.
5. Select **Hunt Group** from the **Service** drop-down list. The Hunt Group tab displays.
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 displays.
2. Select the **Enterprise** and **Group** from the drop-down list, if necessary.
3. Click **Search**.
4. Click the **Edit** link in the row of the user that will be allowed to monitor other users' phone status. The Advanced: User Modify page displays.

5. Select **Integrated IM&P** from the **Service** drop-down list. The Integrated IM&P tab displays.
6. Select **On** to enable IM&P services for the user.
7. Check the **Regenerate IM&P Password** checkbox 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 displays.
2. Select the **Enterprise** and **Group** from the drop-down list, if necessary.
3. Click **Search**.
4. Click the **Edit** link in the row of the user for whom you want to configure Music On Hold settings. The Advanced: User Modify page displays.
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. Check 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 displays.
2. Select the **Enterprise** and **Group** from the drop-down list, if necessary.
3. Click **Search**.
4. Click the **Edit** link in the row of the user who will get priority alerts. The Advanced: User Modify page displays.
5. Select **Priority Alert** from the **Service** drop-down list.

6. Click **Add Priority Alert**. The User: Priority Alert page displays as shown in the following example.

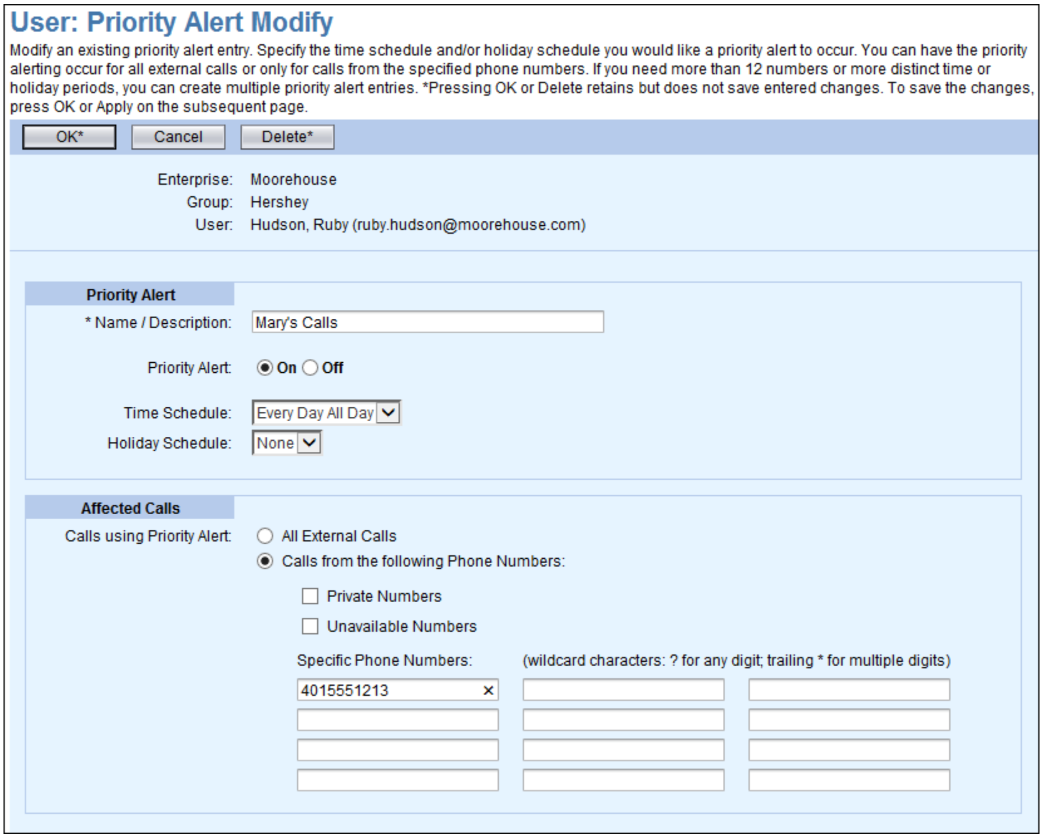


Figure 78 Priority Alert Setup Page

7. Enter a **Name/Description** for the alert.

8. Click **On** for **Priority Alert**.

9. Specify the **Time Schedule** and/or **Holiday Schedule** for which to provide priority alerts.

10. 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.

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 displays.
2. Select the **Enterprise** and **Group** from the drop-down list, if necessary.
3. Click **Search**.
4. Click the **Edit** link in the row of the user for which to enable privacy. The Advanced: User Modify page displays.
5. Select **Privacy** from the **Service** drop-down list. The Privacy tab displays as in the following example.

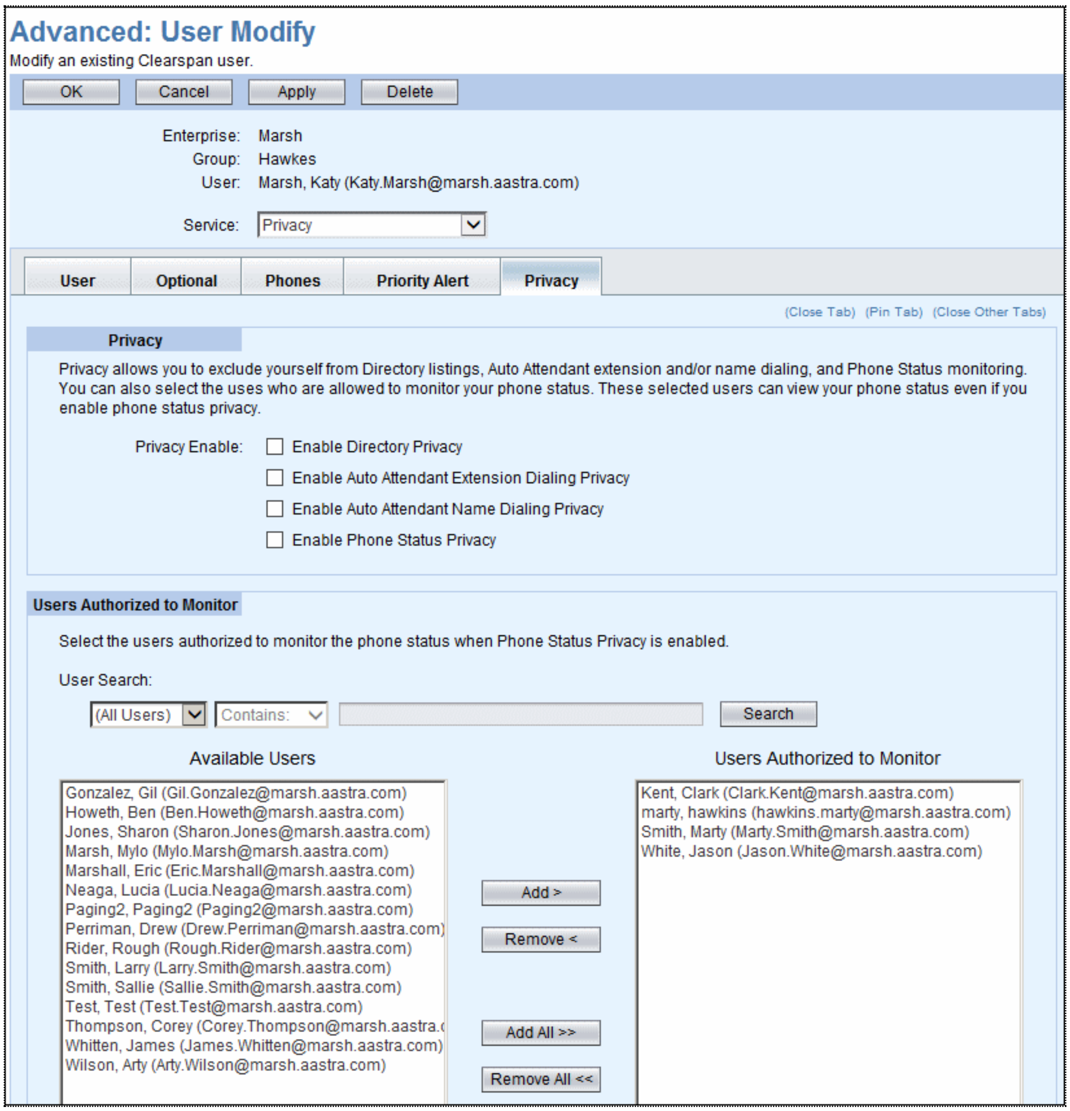


Figure 79 Advanced: User Modify – Privacy Tab

6. Check the types of Privacy that you wish 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.

8. 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**.

Speed Dial 8

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 displays.
2. Select the **Enterprise** and **Group** from the drop-down list, if necessary.
3. Click **Search**.
4. Click the **Edit** link in the row of the user for which to configure Speed Dial 8. The Advanced: User Modify page displays.
5. Choose **Speed Dial 8** from the **Service** drop-down list. The Speed Dial 8 tab displays.
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 displays.
2. Select the **Enterprise** and **Group** from the drop-down list, if necessary.
3. Click **Search**.

4. Click the **Edit** link in the row of the user for which to configure Speed Dial 100. The Advanced: User Modify page displays.
5. Choose **Speed Dial 100** from the **Service** drop-down list. The Speed Dial 100 tab displays.
6. 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.

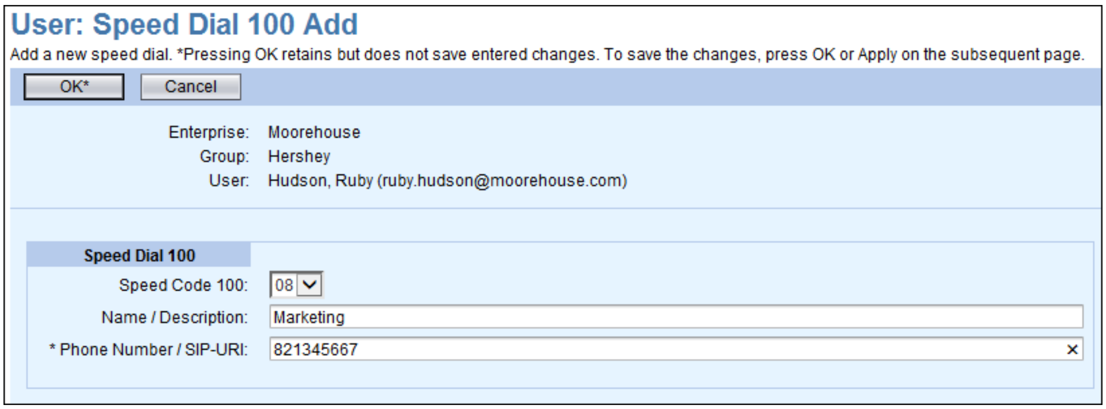


Figure 80 User: Speed Dial 100 Add Dialog Box

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 displays 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 displays.
2. Select the **Enterprise** and **Group** from the drop-down list, if necessary.
3. Click **Search**.
4. Click the **Edit** link in the row of the user for which to configure Speed Dial 100. The Advanced: User Modify page displays.
5. Choose **Speed Dial 100** from the **Service** drop-down list. The Speed Dial 100 tab displays.
6. Click the **Edit** link 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 displays.
2. Select the **Enterprise** and **Group** from the drop-down list, if necessary.
3. Click **Search**.
4. Click the **Edit** link in the row of the user for which to configure Voice Mail.
5. Select **Voice Mail** from the **Service** drop-down list.

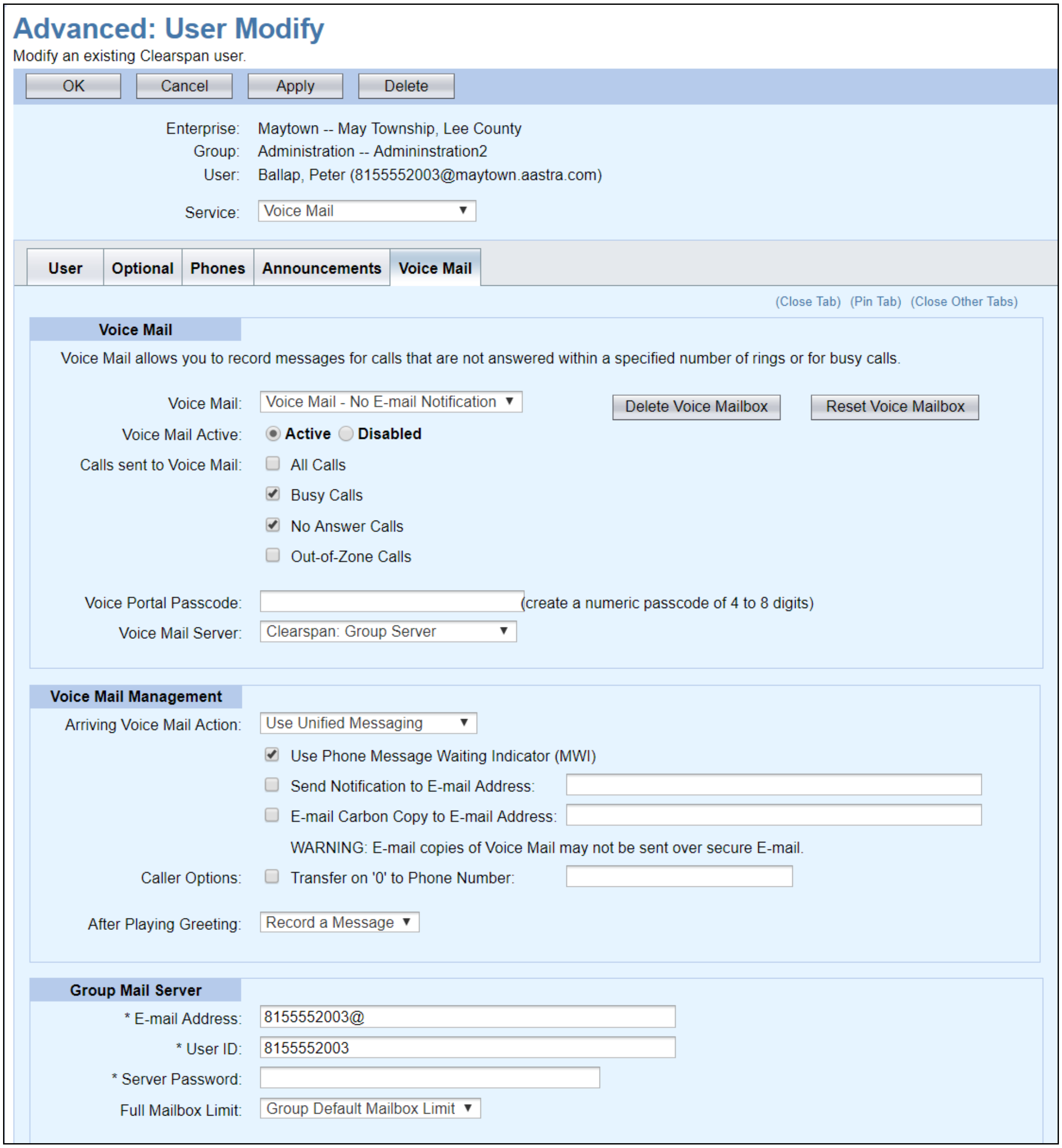


Figure 81 Advanced: User Modify Page – Voice Mail Tab

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. Check the **Calls Sent to Voice Mail** options that you want to set for this user.
9. Choose the **Voice Mail Server** from the drop-down list. It should be the Clearspan: Group Server.

10. Choose the **Arriving Voice Mail Action** options.
11. For **Caller Options**, select whether pressing 0 when voice mail is reached will transfer the caller to another phone number that you specify.
12. Set the **Group Mail Server** options.
13. 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 displays.
2. Select the **Enterprise** and **Group** from the drop-down list, if necessary.
3. Click **Search**.
4. Click the **Edit** link 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 displays.
6. Click the **Add Distribution List** button.
7. Select the **Distribution List Number** from the drop-down list.
8. Enter a list **Description**.
9. 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.

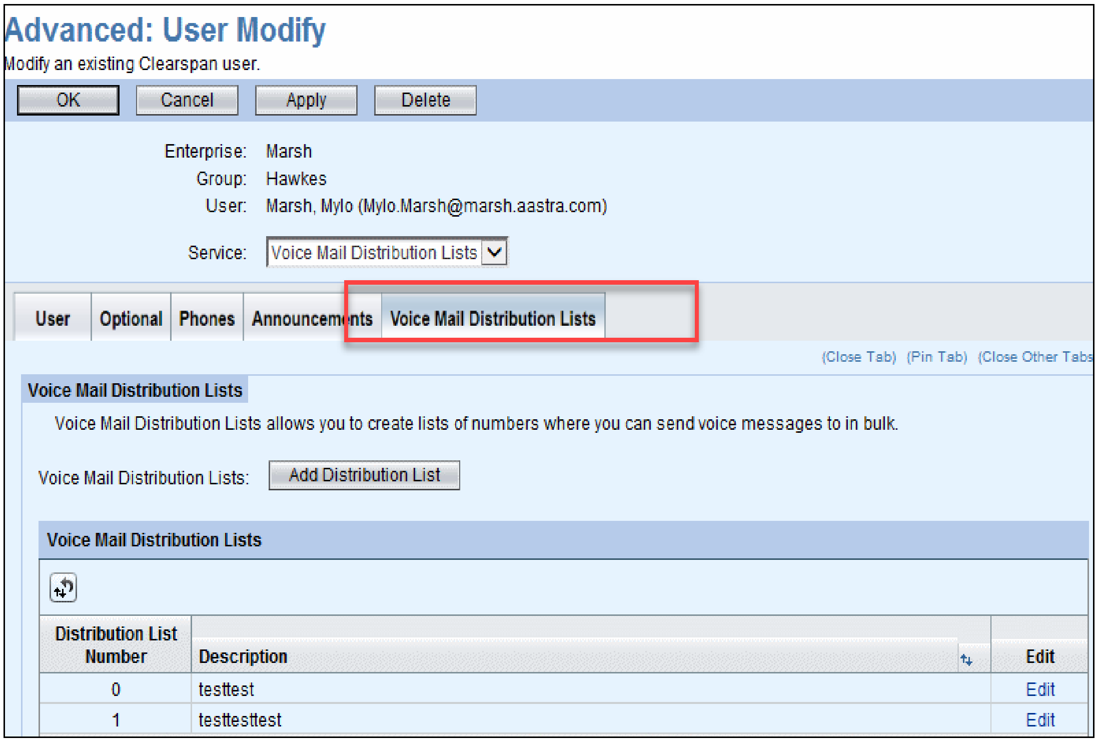


Figure 82 Voice Mail Distribution Lists

Removing an Entry in a Voice Mail Distribution List

1. From the main menu, select **Provisioning** and then **Users**. The Users page displays.
2. Select the **Enterprise** and **Group** from the drop-down list, if necessary.
3. Click **Search**.
4. Click the **Edit** link 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 displays.
6. Click the **Edit** link on the row of the distribution list you want to edit. The list displays.
7. Check the box next to 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 displays.
2. Select the **Enterprise** and **Group** from the drop-down list, if necessary.

3. Click **Search**.

4. Click the **Edit** link in the row of the user for which to configure Voice Mail.

5. Select **Voice Mail Greetings** from the **Service** drop-down list.

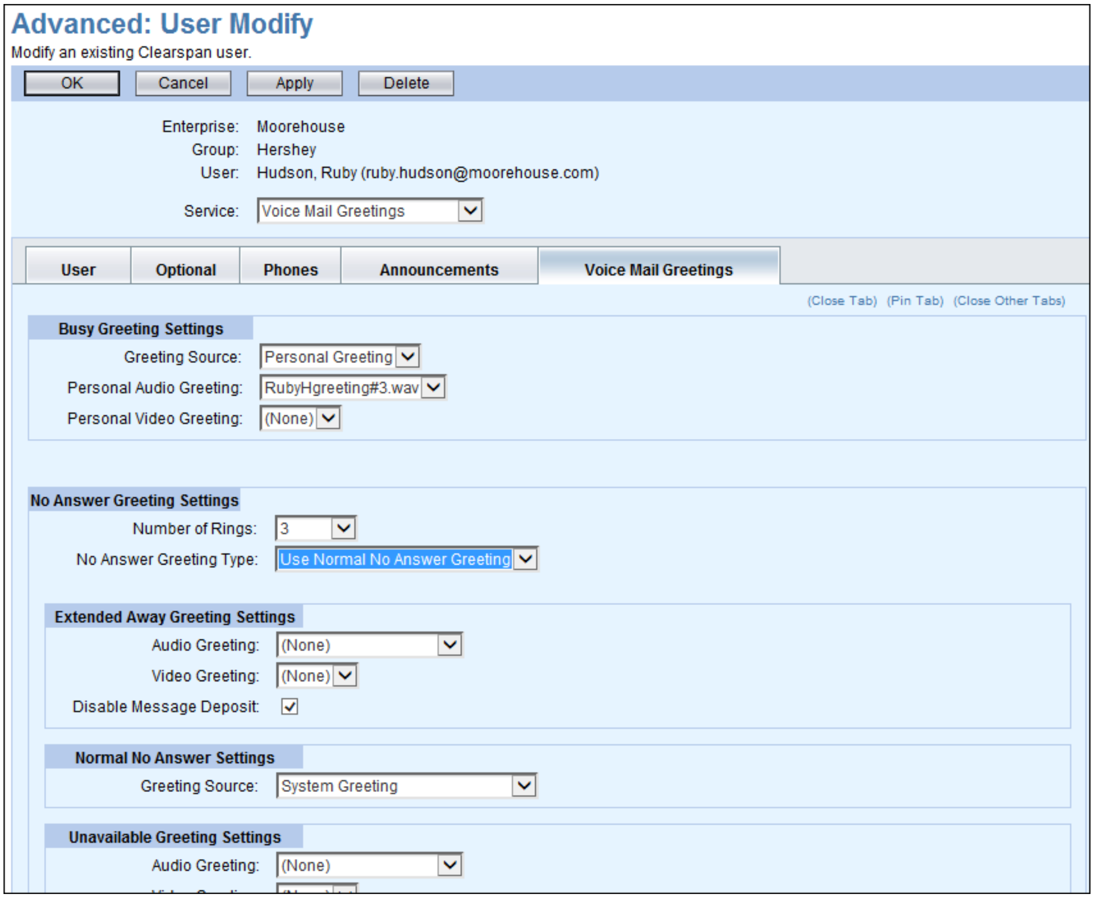


Figure 83 Advanced: User Modify Page – Voice Mail Greetings Tab

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. Check the **Disable Message Deposit** checkbox 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 displays.
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.
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.
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. 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.
7. 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.
8. 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 displays.
3. Click **OK** to exit General Settings.

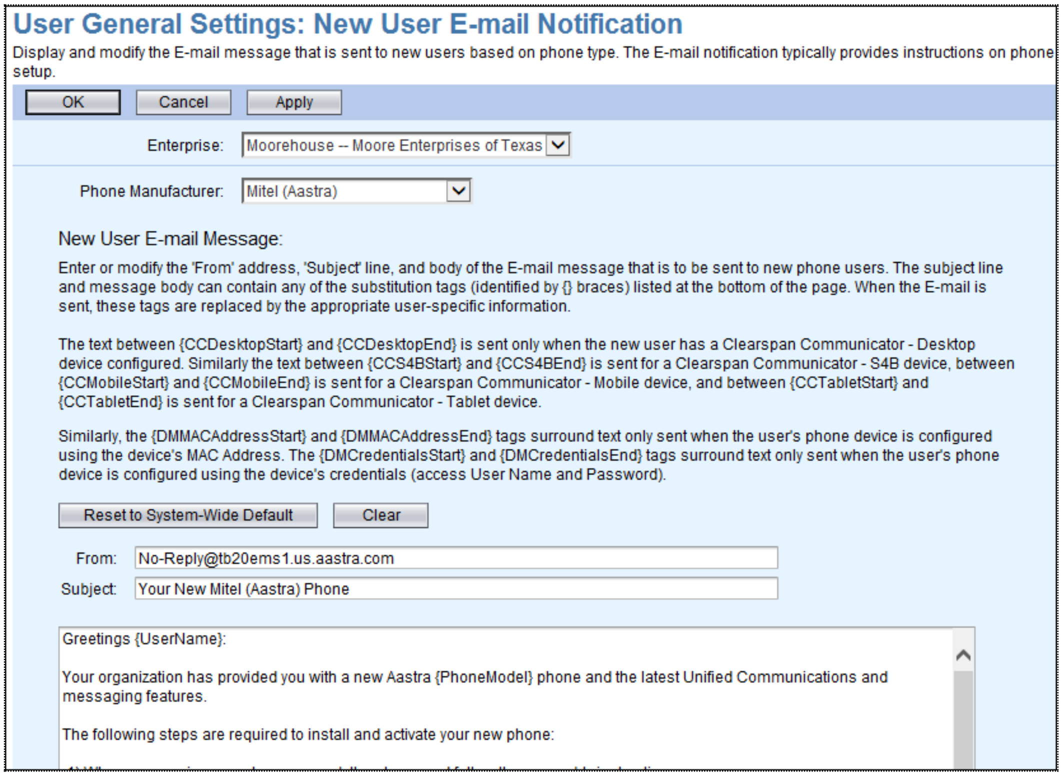


Figure 84 User General Settings: New User E-mail Notification

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 the **Edit** link on the row of the user you wish to delete. The User Modify page displays with a Delete button.
4. Click **Delete.**

> **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. If the User Delete page is displayed, select either **User** or **User and Associated Phone Devices** for **Settings to Delete**.

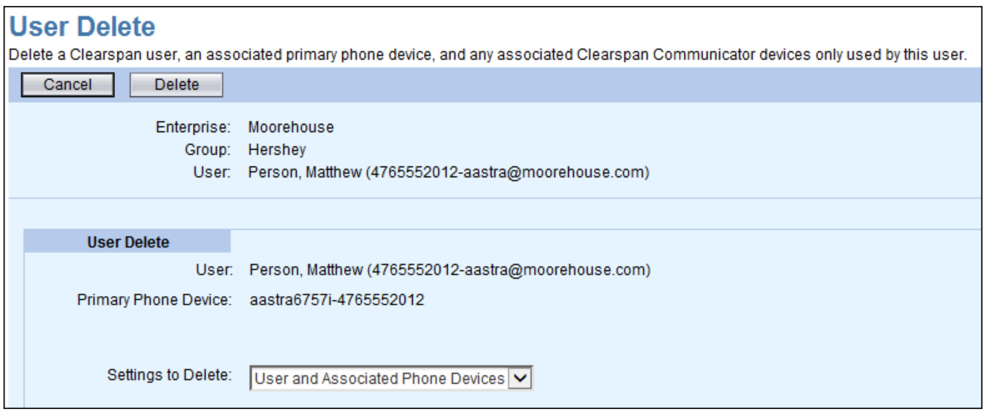


Figure 85 User Delete Page

When **User** is selected, only the user is deleted. All of the associated devices remain, with other users assigned.

When User and Associated Phone Devices is selected:

- The user is deleted.
- 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 assigned to the user is deleted because Clearspan Communicators 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 only available 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 even be shown.

8. Click **Delete** on the User Delete page. The user and phone device 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 (e.g. 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.

Tips:

- 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

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 **Add**. 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. Enter a **Name** for the Auto Attendant.
5. Enter an **Auto Attendant ID** and domain.
6. Select the **Auto Attendant Type**, either **Basic** or **Standard** based on the license.
7. Select the **Department** for which to implement the Auto Attendant.
8. Select the **Phone Number** and/or **Extension** for which to implement the Auto Attendant.
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. Choose to **Enable Video Support**. This field appears only when the group has Auto Attendant - Basic Video or Auto Attendant - Standard service assigned.
11. Enter the **Voice Portal Passcode** if Voice Mail is enabled for the Auto Attendant. The passcode must be 4-8 digits in length, to be determined by the administrator.
12. For **Calling Line ID**, enter the **Last Name**, **First Name**, and **Phone Number** for the Auto Attendant.
13. Select the **Business Hours** and **Holiday Schedule** to use for the Auto Attendant.
14. Select **Enterprise**, **Group**, or **Department** as the dialing options for **Extension Dialing Scope** and **Name Dialing Scope**. Use the name and extension dialing scope controls to determine whether your Auto Attendant can direct calls to users in the same group, department, or enterprise.

15. Choose the **LastName** and **FirstName** order for **Name Dialing Order**. This setting determines whether callers are allowed to begin entering either the last name or first name of the person they want to reach, or only the last name.

16. Determine the features to enable for the Auto Attendant. Click on the **Available Service(s)** in the list on the left, and click **Add**.

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 on 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

1. Click on the **Submenus** tab of the Auto Attendant Add page to view or change the submenus for the Auto Attendant functionality. This tab displays 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. Check **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.

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. Check the **Calls Sent to Voice Mail** options that you want to set for the Auto Attendant.
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 may not be sent over secure E-mail.

7. Set the **Group Mail Server** options.
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** 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 the Auto Attendant's individual or group Announcement Repository. Check 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.

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 **Add** 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.

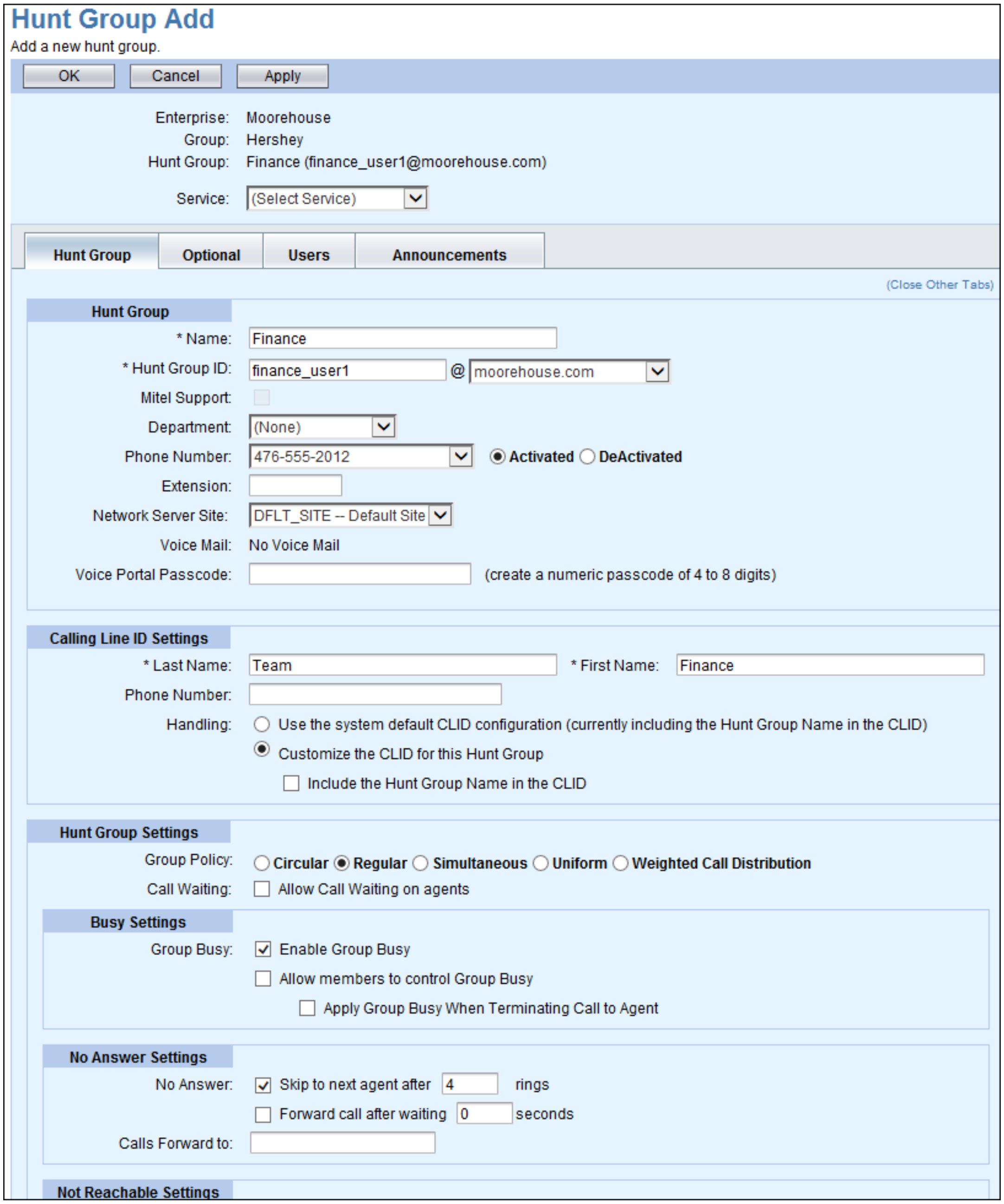


Figure 86 Hunt Group Page

5. 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.
6. Configure the **Department**, **Phone Number**, **Extension**, **Network Server Site**, and Voice Mail settings for the Hunt Group.
7. **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.
8. Enter the **Last Name**, **First Name**, and **Phone Number** for Calling Line ID (CLID) Settings.

9. 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 uncheck Include the Hunt Group Name in the CLID.
10. 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.
11. Select or unselect 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.
12. Select **Enable Group Busy** to activate the group busy policy for the hunt group.
13. You can check **Allow members to control Group Busy** to give group members control over this policy.
14. Check 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.
15. Select **Allow members to control Group Busy** to allow group members to control the hunt group’s busy status.
16. 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.
17. 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.
18. Select **Enable Call Forwarding Not Reachable** to forward calls to the specified phone number when all agents are not reachable.
19. Check **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 checked.
20. Enter the **Calls Forward to** number where you want the calls to be forwarded when all agents are unreachable.
21. Use **Add** and **Remove** to select all user services required by the Hunt Group.

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 a new user or when modifying 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

To configure selective call forwarding for the Hunt Group, select **Call Forward Selective** from the Service drop-down. This 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.

Voice Mail Tab

1. To configure Voice Mail for the Hunt Group, select **Voice Mail** from the Service drop-down. 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. Check 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 may not be sent over secure E-mail.

7. Set the **Group Mail Server** options.
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. Check 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 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**.

CONFIGURING FLEXIBLE SEATING HOSTS

Flexible Seating allows users to associate with a Mitel (DMS) or 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.

1. 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 on page 159.

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

   Adding a Phone Device on page 43.

4. To create the Flexible Seating host, select **Provisioning**, **Virtual Users**, and **Flexible Seating Hosts**.

5. Select the **Enterprise** and **Group** from the drop-down list, if necessary.

6. 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.

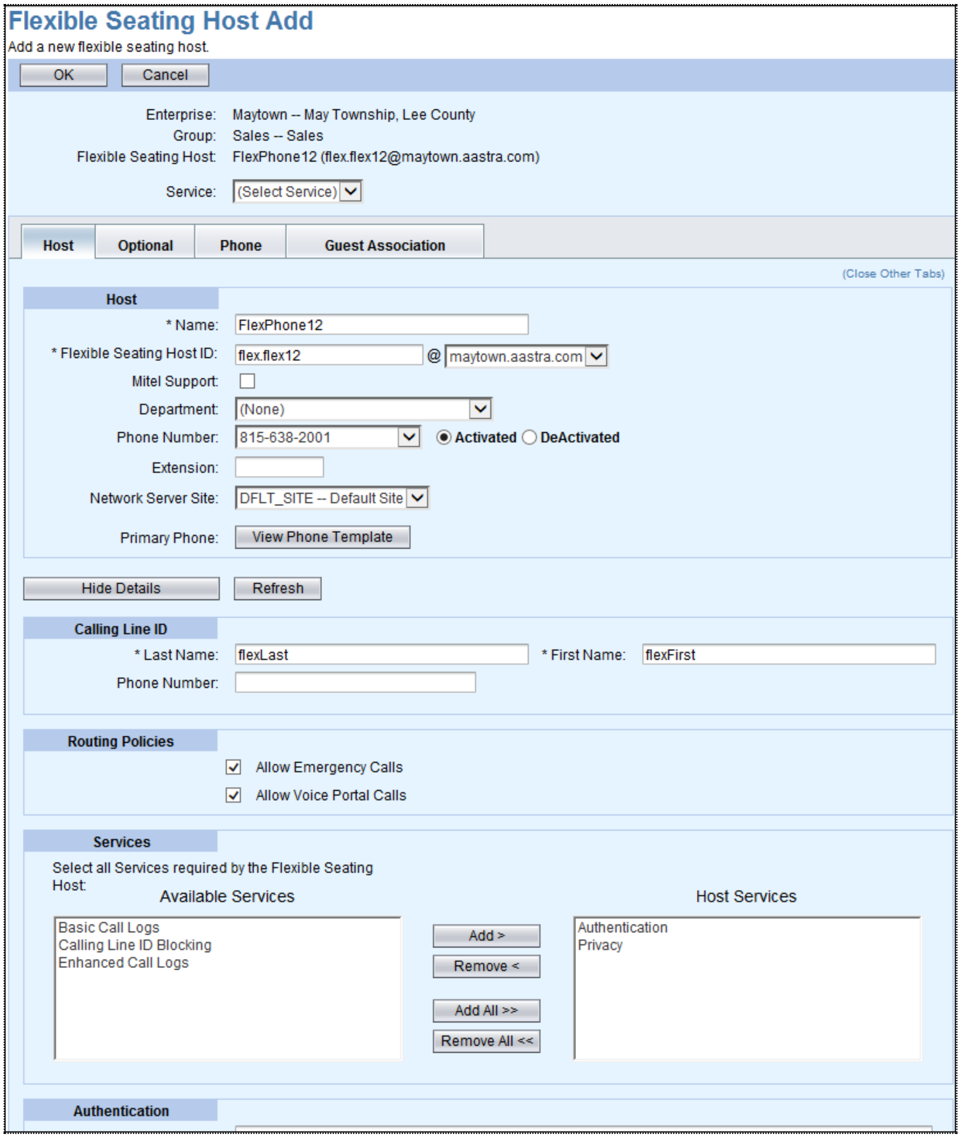


Figure 87 Flexible Seating Host Add Page

7. On the Host tab, enter a **Name** and unique **Flexible Seating Host ID**, and select a domain from the drop-down list.

8. Configure the **Department**, **Phone Number**, and **Extension** settings for the Flexible Seating host.

9. Enter the **Last Name**, **First Name**, and **Phone Number** for Calling Line ID (CLID) Settings.

10. Select the **Routing Policies**.
    - **Allow Emergency Calls** permits emergency calls from this user.
    - **Allow Voice Portal Calls** permits voice portal calls from this user.

11. Use **Add** and **Remove** to select all user services required by the Flexible Seating host.

12. Enter the **Name** and **Password** for **Authentication**.

13. 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

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

Phone Tab

15. 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**.
16. 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.
17. On the Phone tab, select whether to **Restart Phones on Save**.
18. 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

19. On the Guest Association tab, check the **Association Limit** checkbox 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.
20. 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.
21. 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 of 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 only make emergency calls or calls into the voice portal.

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.

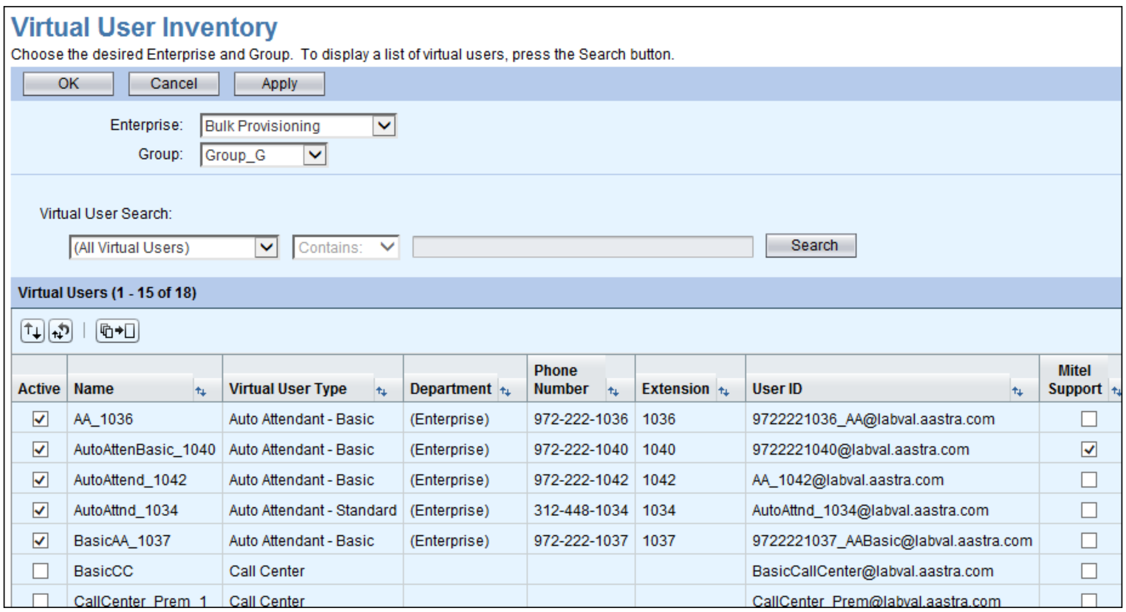


Figure 88 Virtual User Inventory Search

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, etc. 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 desired, set the User or Polycom 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.

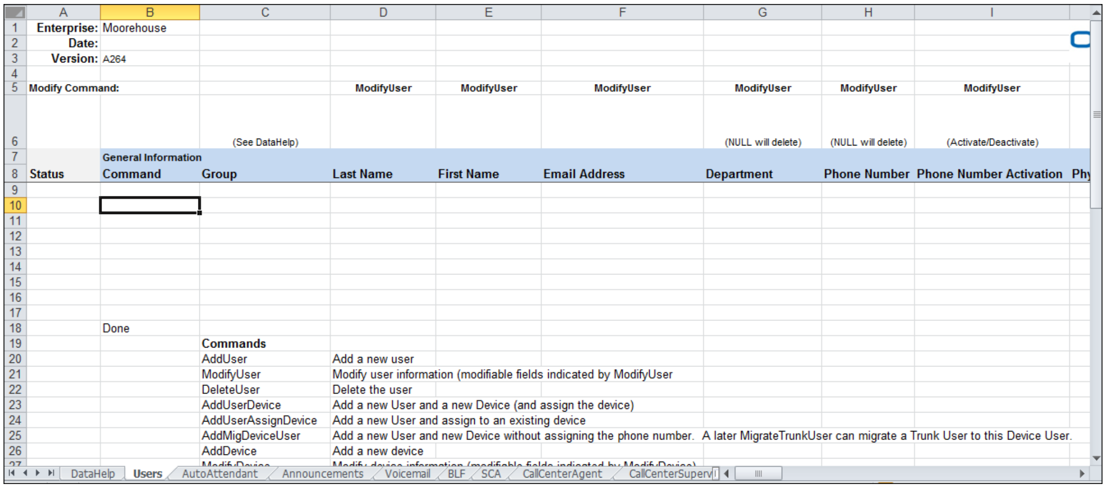


Figure 89 Import Advanced – Get Worksheet – New Worksheet

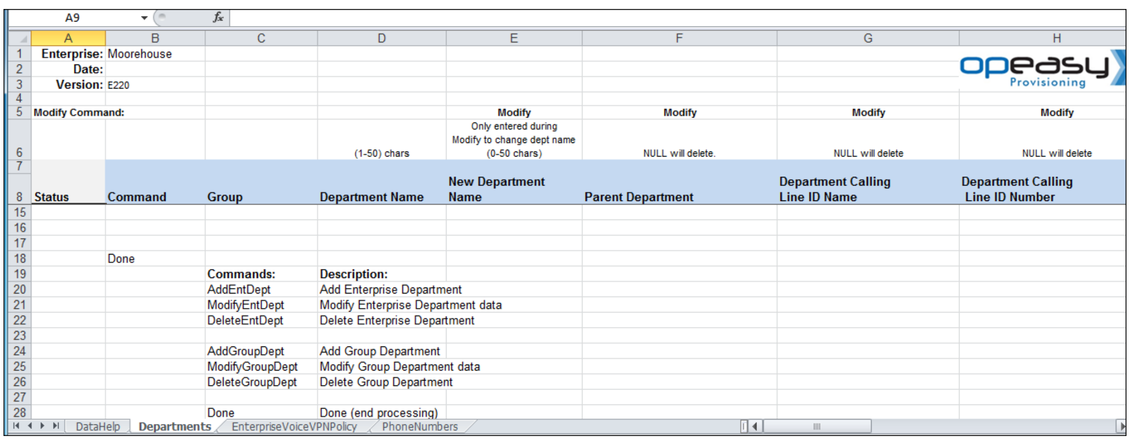
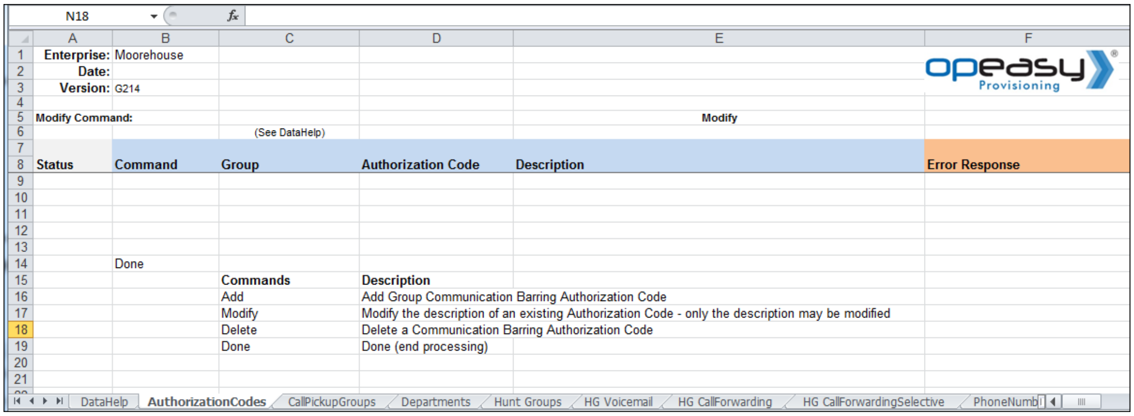


Figure 90 Import Enterprise – Get Worksheet – New Worksheet



Enterprise: Moorehouse
Date:
Version: G214

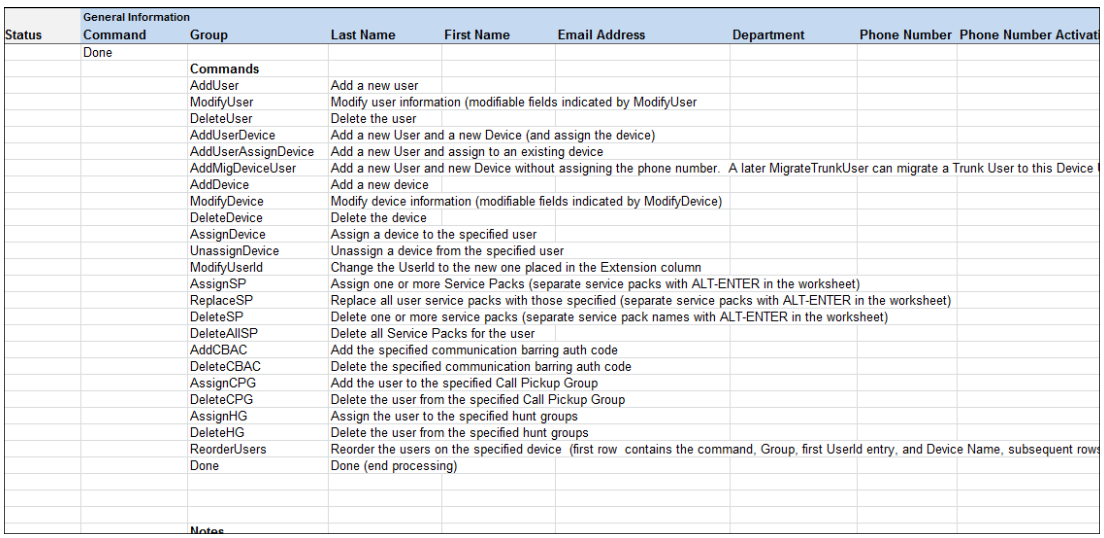
Modify Command: Modify
(See DataHelp)

Status	Command	Group	Authorization Code	Description	Error Response
	Done				
		Commands	Description		
		Add	Add Group Communication Barring Authorization Code		
		Modify	Modify the description of an existing Authorization Code - only the description may be modified		
		Delete	Delete a Communication Barring Authorization Code		
		Done	Done (end processing)		

DataHelp / AuthorizationCodes / CallPickupGroups / Departments / Hunt Groups / HG Voicemail / HG CallForwarding / HG CallForwardingSelective / PhoneNumb

Figure 91 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.



Status	General Information Command	Group	Last Name	First Name	Email Address	Department	Phone Number	Phone Number Activati
	Done							
		Commands						
		AddUser	Add a new user					
		ModifyUser	Modify user information (modifiable fields indicated by ModifyUser					
		DeleteUser	Delete the user					
		AddUserDevice	Add a new User and a new Device (and assign the device)					
		AddUserAssignDevice	Add a new User and assign to an existing device					
		AddMigDeviceUser	Add a new User and new Device without assigning the phone number. A later MigrateTrunkUser can migrate a Trunk User to this Device					
		AddDevice	Add a new device					
		ModifyDevice	Modify device information (modifiable fields indicated by ModifyDevice)					
		DeleteDevice	Delete the device					
		AssignDevice	Assign a device to the specified user					
		UnassignDevice	Unassign a device from the specified user					
		ModifyUserId	Change the UserId to the new one placed in the Extension column					
		AssignSP	Assign one or more Service Packs (separate service packs with ALT-ENTER in the worksheet)					
		ReplaceSP	Replace all user service packs with those specified (separate service packs with ALT-ENTER in the worksheet)					
		DeleteSP	Delete one or more service packs (separate service pack names with ALT-ENTER in the worksheet)					
		DeleteAllSP	Delete all Service Packs for the user					
		AddCBAC	Add the specified communication barring auth code					
		DeleteCBAC	Delete the specified communication barring auth code					
		AssignCPG	Add the user to the specified Call Pickup Group					
		DeleteCPG	Delete the user from the specified Call Pickup Group					
		AssignHG	Assign the user to the specified hunt groups					
		DeleteHG	Delete the user from the specified hunt groups					
		ReorderUsers	Reorder the users on the specified device (first row contains the command, Group, first UserId entry, and Device Name, subsequent rows					
		Done	Done (end processing)					
		Notes						

Figure 92 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 as long as 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.

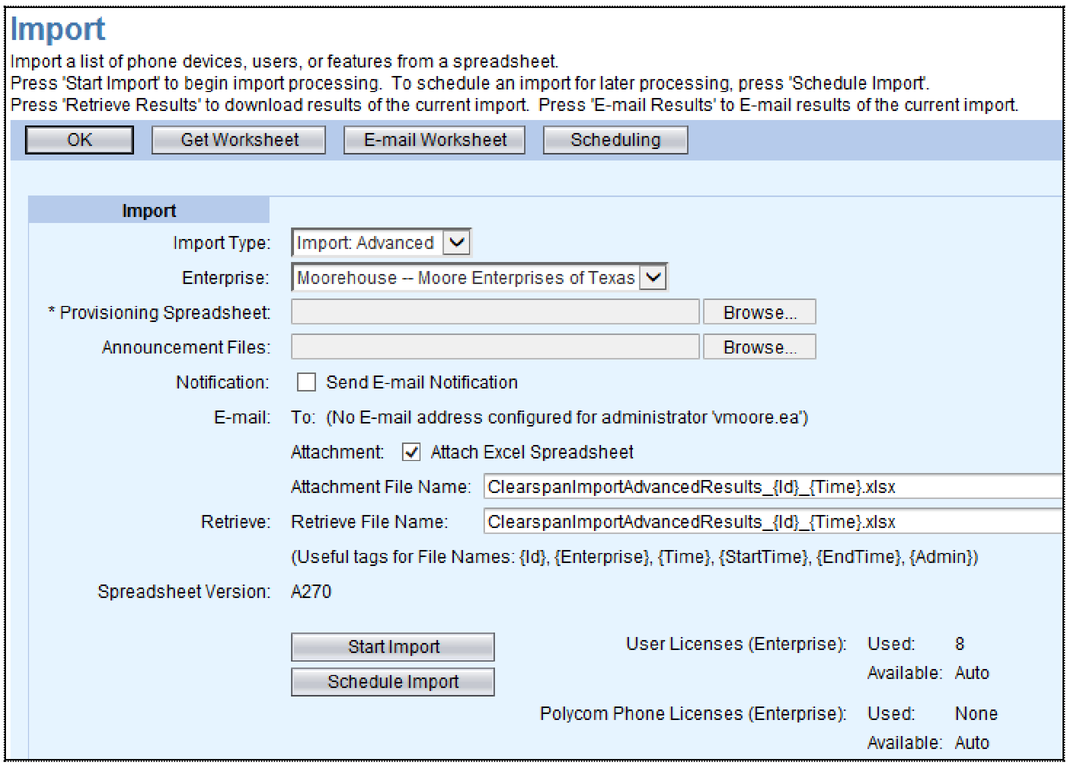


Figure 93 Import Advanced Completed Successfully

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 wish 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. Check the **Notification** check box to have an E-Mail notification sent to you with processing results.
7. Check the **Attach Excel Spreadsheet** box if you wish 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 in the filename that are listed below the text box.
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…**".

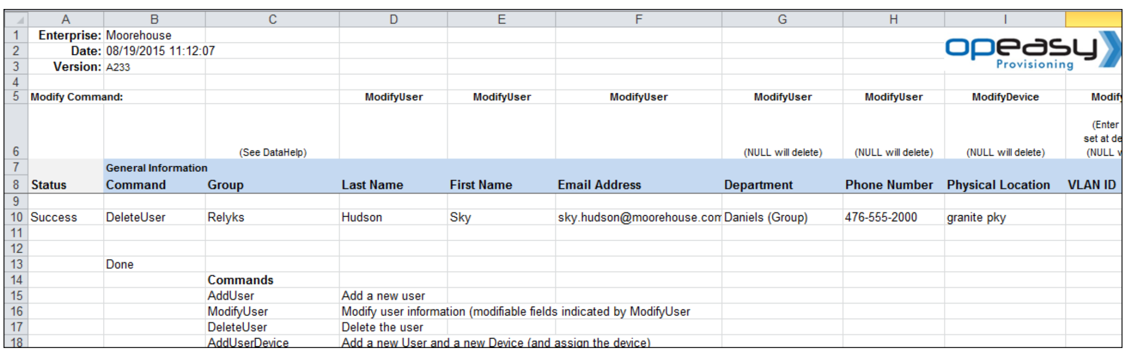
Note: A User License is required for each added or modified user, and a Polycom Phone License is required for each added or modified Polycom phone. The import aborts on a line where a license could not be obtained. You can restart the import after adding the appropriate number and type of licenses to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

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

VIEWING IMPORT RESULTS

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

1. Click **Retrieve Results**.
2. Click **Open**. An Excel spreadsheet with a filename similar to "ClearspanImportAdvancedResults_443_20150911-094209.xlsm" opens.



	A	B	C	D	E	F	G	H	I	
1	Enterprise:	Moorehouse								
2	Date:	08/19/2015 11:12:07								
3	Version:	A233								
4										
5	Modify Command:			ModifyUser	ModifyUser	ModifyUser	ModifyUser	ModifyUser	ModifyDevice	Modif
6			(See DataHelp)				(NULL will delete)	(NULL will delete)	(NULL will delete)	(Enter set at de (NULL v
7		General Information								
8	Status	Command	Group	Last Name	First Name	Email Address	Department	Phone Number	Physical Location	VLAN ID
9										
10	Success	DeleteUser	Relyks	Hudson	Sky	sky.hudson@moorehouse.com	Daniels (Group)	476-555-2000	granite pky	
11										
12										
13		Done								
14			Commands							
15			AddUser	Add a new user						
16			ModifyUser	Modify user information (modifiable fields indicated by ModifyUser						
17			DeleteUser	Delete the user						
18			AddUserDevice	Add a new User and a new Device (and assign the device)						

Figure 94 Spreadsheet Processed Successfully – User Deleted

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.

The following image is an example of the Export Clearspan Data page.

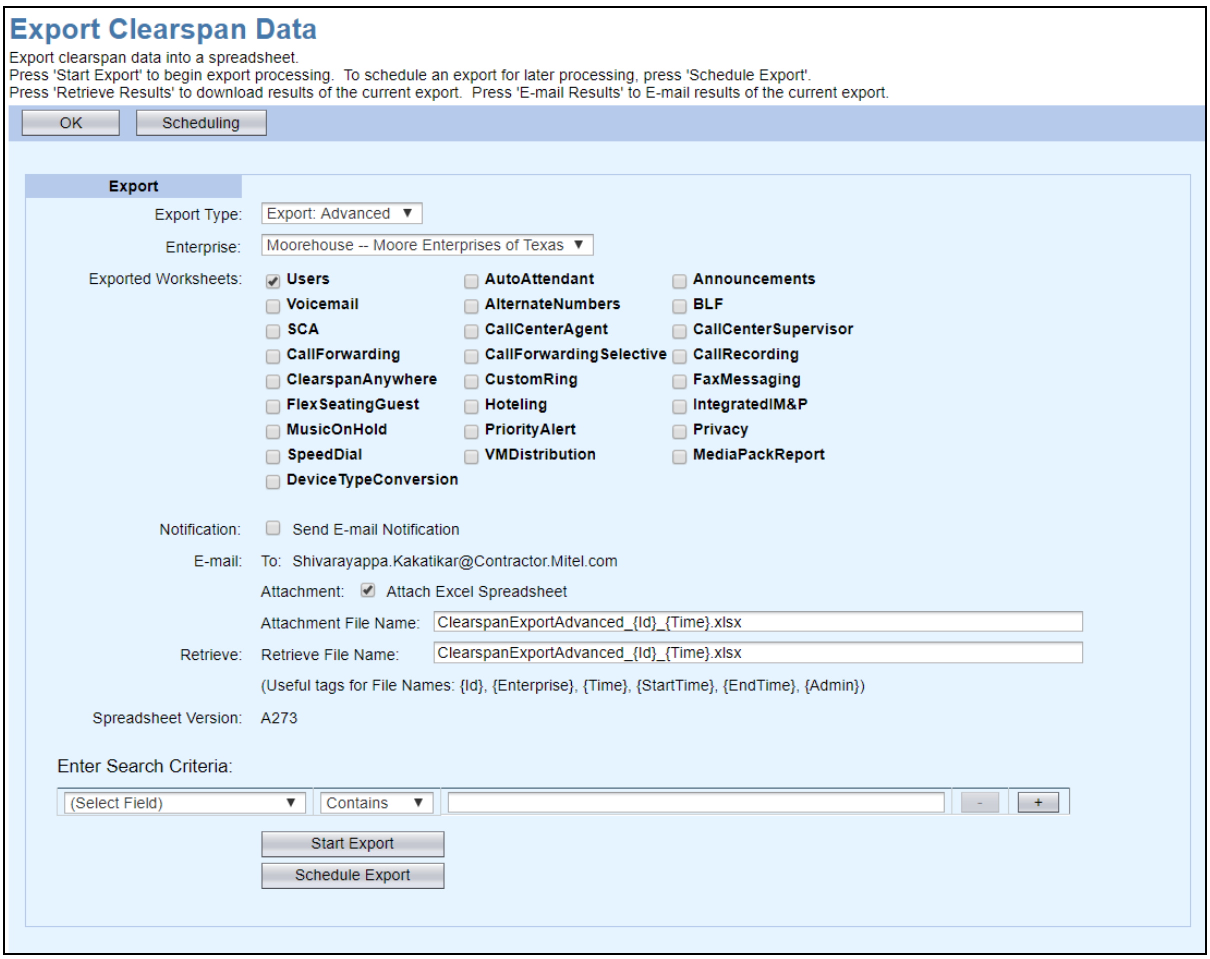


Figure 95 Export Clearspan Data

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. Check the type of information desired in the **Exported Worksheets** checklist.
4. Check the **Notification** check box to have an E-Mail notification sent to you with processing results.
5. Check the **Attach Excel Spreadsheet** box if you wish 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.

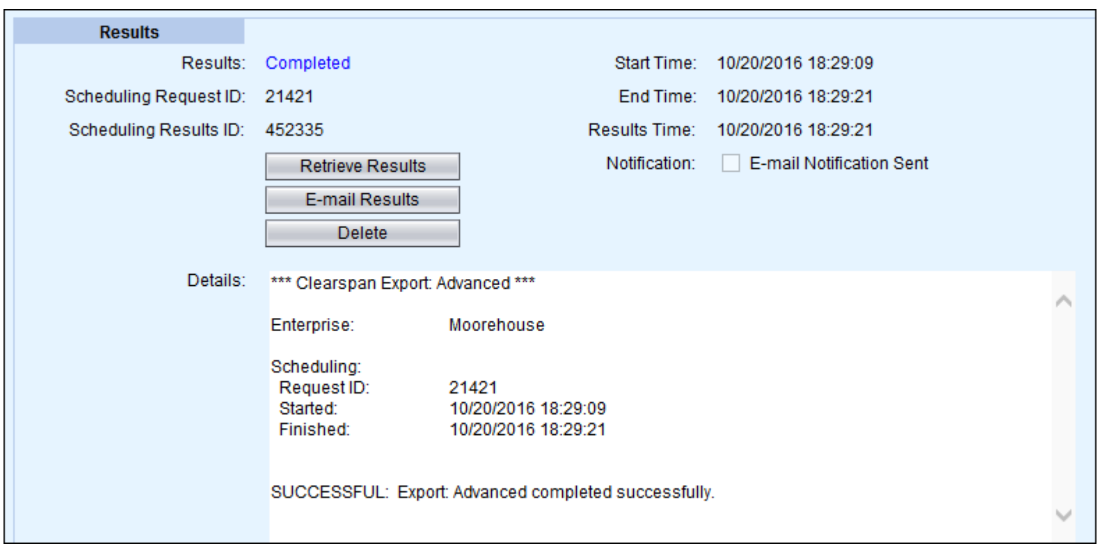


Figure 96 Export Clearspan Data – Advanced Export Complete

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

	A	B	C	D	E	F	G	H	I	J	
1	Enterprise:	Moorehouse -- Moore Enterprises of Texas									
2	Date:	02/28/2017 14:08:26									
3	Version:	A268									
4											
5	Modify Command:			ModifyUser	ModifyUser	ModifyUser	ModifyUser	ModifyUser	ModifyUser	ModifyDevice	Modi
6			(See DataHelp)				(NULL will delete)	(NULL will delete)	(Activate/Deactivate)	(NULL will delete)	(Ente set at d (NULL
7									General Information		
8	Status	Command	Group ID	Last Name	First Name	Email Address	Department	Phone Number	Phone Number Activation	Physical Location	VLAN ID
9			Relyks	PJ	Nobles			476-555-2001	Deactivated		
10			Relyks	Hudson	Sky	sky.hudson@moorehouse.coı	Daniels (Group)	476-555-2000	Deactivated	granite pky	
11			Hershey	Moretti	Tessa			476-555-2010	Activated	bldg 8	
12			Hershey	Foster	Nyx	nyxf@moorehouse.com		476-555-2011	Activated	bldg 8	
13			Relyks	Johnson	Sheron	sheron.johnson@mitel.com		476-555-2009	Deactivated	5850 Granite Pky	
14			Hershey	Bordois	Stella			476-555-2019	Deactivated		
15			Hershey	Matthews	Syd			476-555-2012	Deactivated		
16	Device Row		Hershey								
17	Device Row		Hershey								

Users / BLF / CallForwarding / Hoteling

Figure 97 Advanced Export Results Spreadsheet – Users Tab

	A	B	C	D	E	F	G	H	I	
1	Enterprise:	Moorehouse -- Moore Enterprises of Texas								
2	Date:	02/28/2017 14:08:26								
3	Version:	A268								
4										
5	Modify Command:									
6				(true/false)		(true/false)	(true/false)		(true/false)	
7										
8	Status	Command	UserID	CFWD All Active	CFWD All Number	CFWD All Play Reminder	CFWD Busy Active	CFWD Busy Number	CFWD No Answer Active	CFWD I Numbe
9			123987@moorehouse.com	False		False	False		False	
10			4765552000@moorehouse.co	False		False	False		False	
11			4765552010@moorehouse.co	False		False	False		False	
12			4765552011@moorehouse.co	False		False	False		False	
13			sheron.johnson@moorehouse	False		False	False		False	
14			stella.bordois@moorehouse.c	False		False	False		False	
15			syd.matthews@moorehouse.(	False		False	False		False	
16										
17			Command	Description						
18			Modify	Modify Call Forwarding settings for the user						
19										

Users / BLF / CallForwarding / Hoteling

Figure 98 Advanced Export Results Spreadsheet – Call Forwarding Tab

A1 — Enterprise:

	A	B	C	D	E	F	G	H	I	J	K
1	Enterprise:	Marsh									
2	Date:	06/25/2013 14:22:33									
3	Version:	A245									
4											
5	Modify Command:			Modify	Modify						
6				(NULL will delete)							
7											
8	Status	Command	UserID	BLF List URI	Entry UserId	Error Response					
9			Ben.Howeth@marsh.aastra.co	ben.howeth@marsh.aastra.coı	Gil.Gonzalez@marsh.aastra.com						
10					Katy.Marsh@marsh.aastra.com						
11					Mylo.Marsh@marsh.aastra.com						
12											
13			Command	Description							
14			Modify	Add or modify BLF info (first row for each user contains the command, URI, and first UserId entry, subsequent rows may contain additional en							
15			DeleteList	Delete the BLF UserId list							
16											

Figure 99 Advanced Export of BLF Data Example

	A	B	C	D	E	F	G	H
1	Date:	02/28/2017 14:12:01						
2	Version:	S204						
3								
4								
5	Modify Command:							
6							(true/false)	
7		Administrator			Password			E-mail
8	Status	Command	Login Name	Administrator Name	Password Changed Time	Password Remaining Time	Change Password Next Login	E-mail Address
9			ssingh	Sameena Singh	2016/10/11 07:10:15		False	ssingh@aastra.com
10			vmoore.da	Violetta Moore	2016/10/11 07:10:15		False	vmoore@aastra.com
11			vmoore.ga	Vince Moore	2016/10/11 07:10:15		False	vince.moore@company.com
12		Done						
13								

OpEasy Administrators | OpEasy Login Rules

Figure 100 System Data Export Example

	A	B	C	D	E	F	
1	Enterprise:	Moorehouse					
2	Date:	08/19/2015 11:27:40					
3	Version:	E220					
4							
5	Modify Command:				Modify	Modify	
6				(1-50) chars	Only entered during Modify to change dept name (0-50 chars)	NULL will delete.	NUL
7			Blank for Enterprise Department				
8	Status	Command	Group	Department Name	New Department Name	Parent Department	Department Line ID Name
9			Relyks	Daniels			Daniels
10			Hershey	Facilities			
11							
12		Commands	Description				
13		AddEntDept	Add Department in Enterprise				
14		ModifyEntDept	Modify Enteprise Department data				
15		DeleteEntDept	Delete Enterprise Department				
16		AddGroupDept	Add Department (Enterprise or group)				
17		ModifyGroupDep	Modify Department data				
18		DeleteGroupDep	Delete department				
19							

Departments

Figure 101 Enterprise Export of Departments Data Example

	A	B	C	D	E	F	G	H	I	
1	Enterprise:	Moorehouse								
2	Date:	01/09/2017 09:05:44								
3	Version:	G251								
4										
5	Modify Command:				Modify	Modify	Modify	Modify	Modify	
6			(See DataHelp)	(See DataHelp. 1-128 chars)	(NULL will delete)	(Normal or VoiceMailOnly)	(true/false)	(true/false)	(true/false)	
7		General Information								
8	Status	Command	Group	User Profile Name	Description	User Type	Send Email to New User	Send Email to OpEasy Admin	Send Email to Phone Procurement	Phone Email
9			Hershey	6757i Internal	6757i Phones for Internal Group	Normal	True	False	False	
10			Hershey	Communicator Skype Plugin	Skype for Business Add-In for Clear	Normal	False	False	False	
6										
7			Hershey	Moorehouse Audiocodes		Normal	True	False	False	
			Hershey	Moorehouse testing		Normal	True	False	False	vmoore
			Hershey	PLCM410	Polycom VVX 410 template	Normal	True	False	False	
8			Relvks	6869i Testers	6869i phones for Testing group	Normal	True	False	False	

AuthorizationCodes | CallPickupGroups | Departments | UserProfiles

Figure 102 Group Export of User Profiles Data Example

SCHEDULING AN IMPORT OR EXPORT

You can schedule an Import or Export to happen at a later time 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.

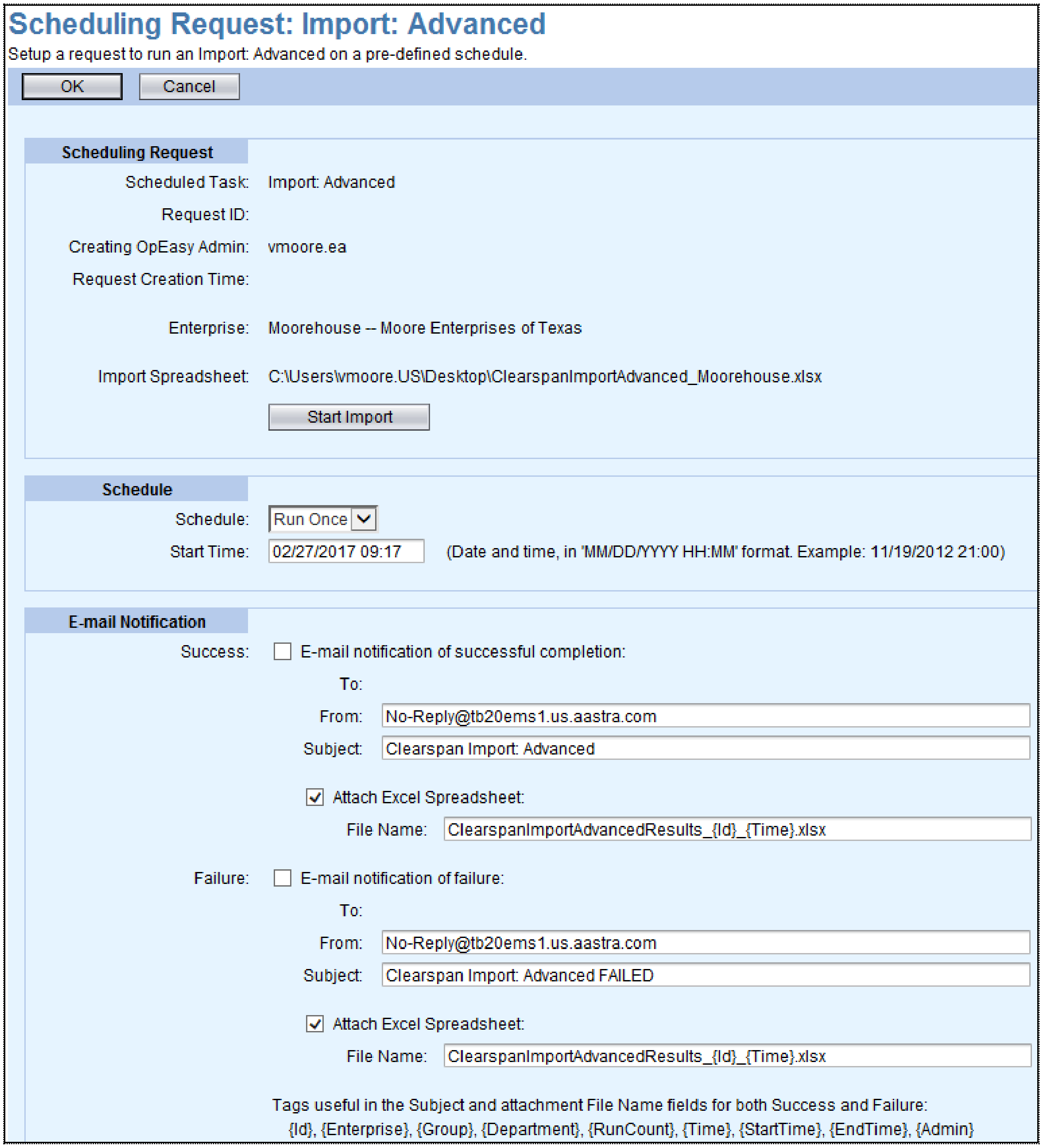


Figure 103 Scheduling Request: Import: Advanced

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

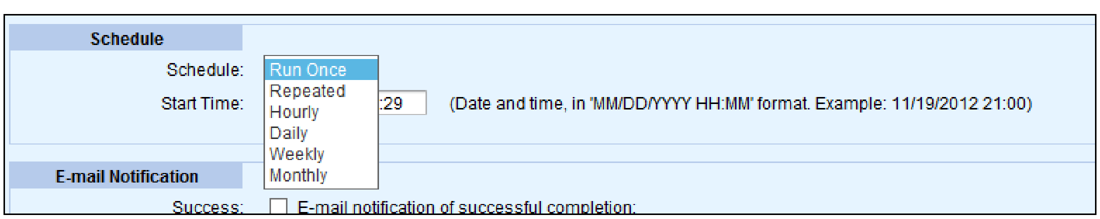


Figure 104 Selecting the Schedule Type

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.

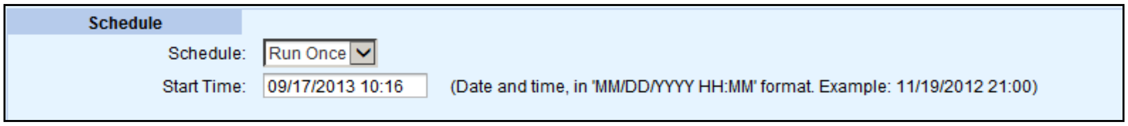


Figure 105 Schedule Run Once

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.

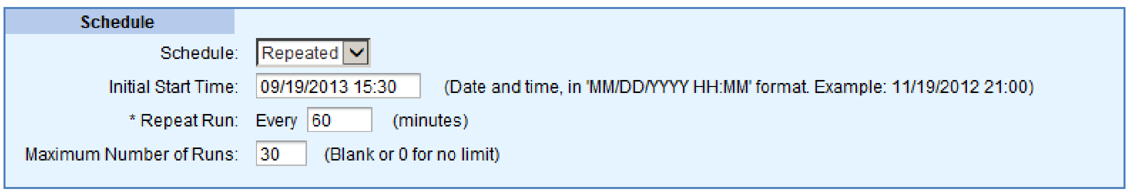


Figure 106 Schedule Repeated

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.

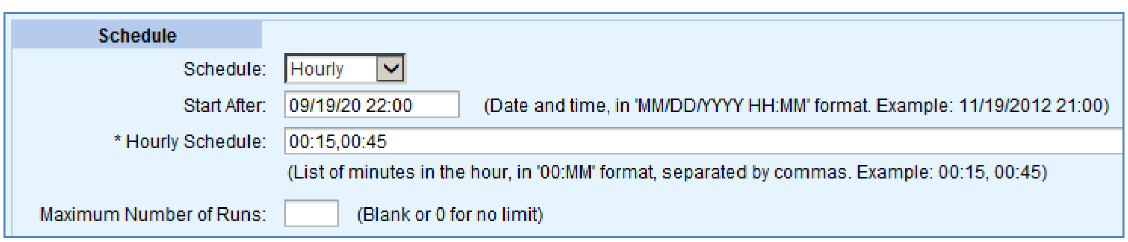


Figure 107 Schedule Hourly

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.

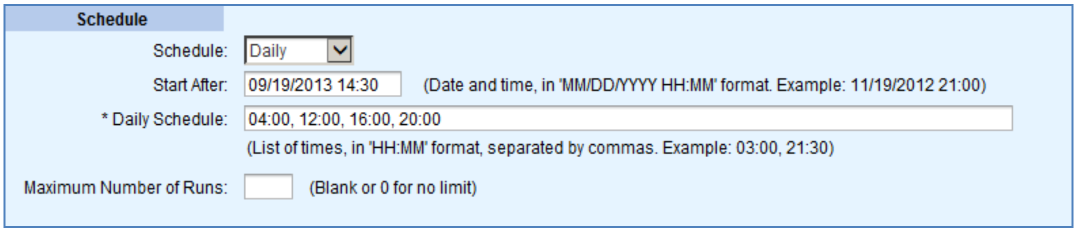


Figure 108 Schedule Daily

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.

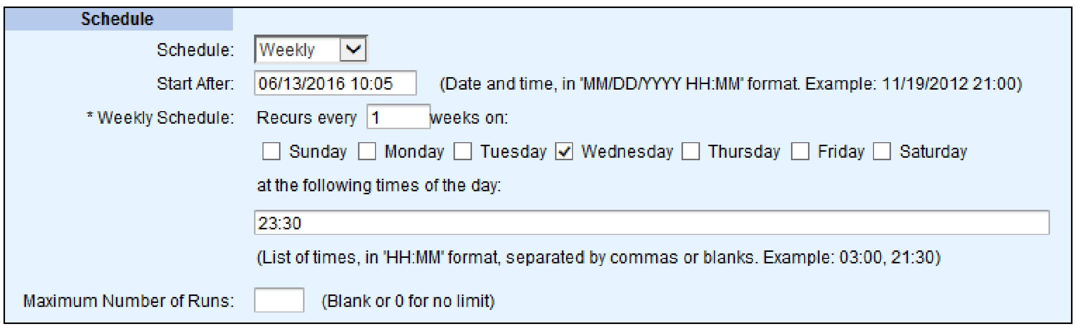


Figure 109 Schedule Weekly

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.

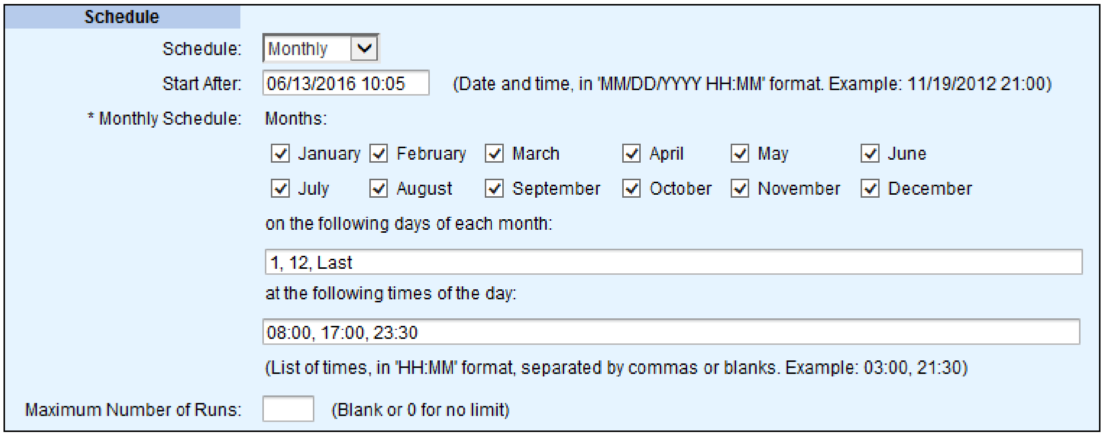


Figure 110 Schedule Monthly

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 111 for an example.

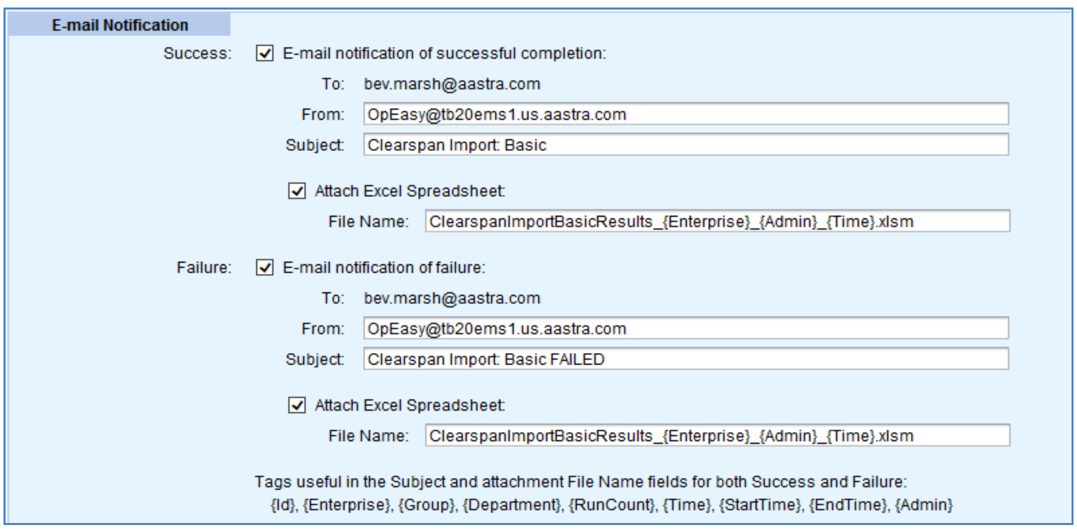


Figure 111 E-mail Notification Section - Setup

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.

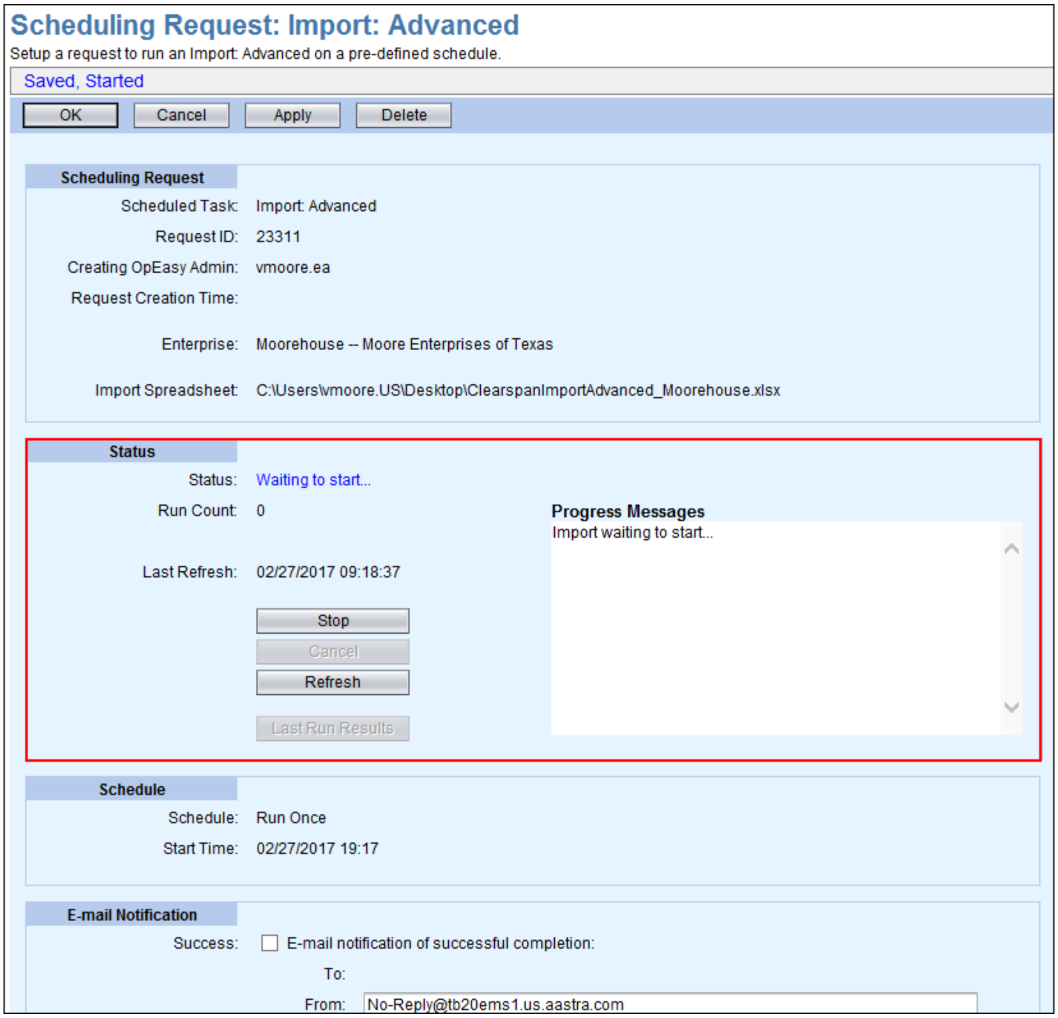


Figure 112 Status Section

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 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 and exports that are scheduled, finished, waiting to run, etc.
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.

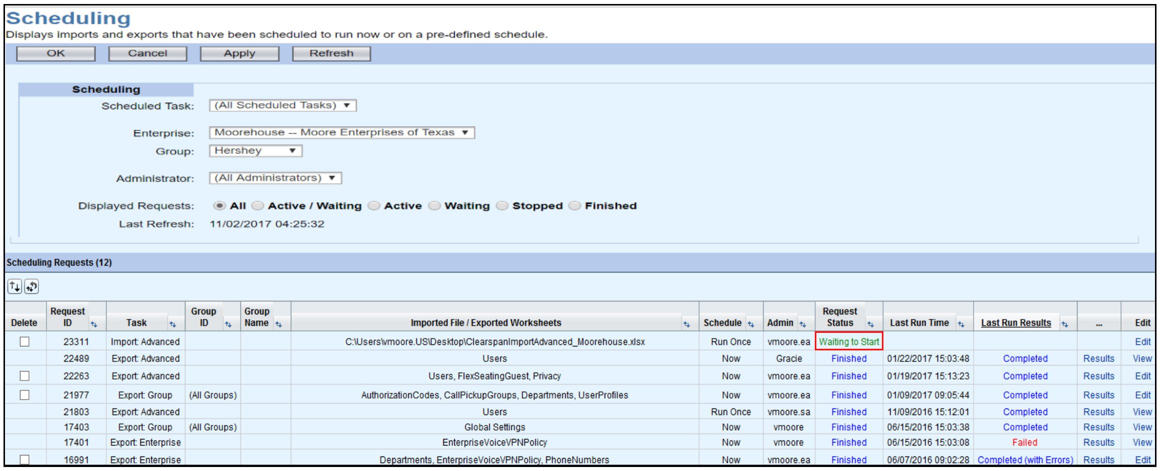


Figure 113 Worksheet Waiting to start a Run

The following example illustrates a worksheet that failed when it was processed, and a worksheet that imported with errors.

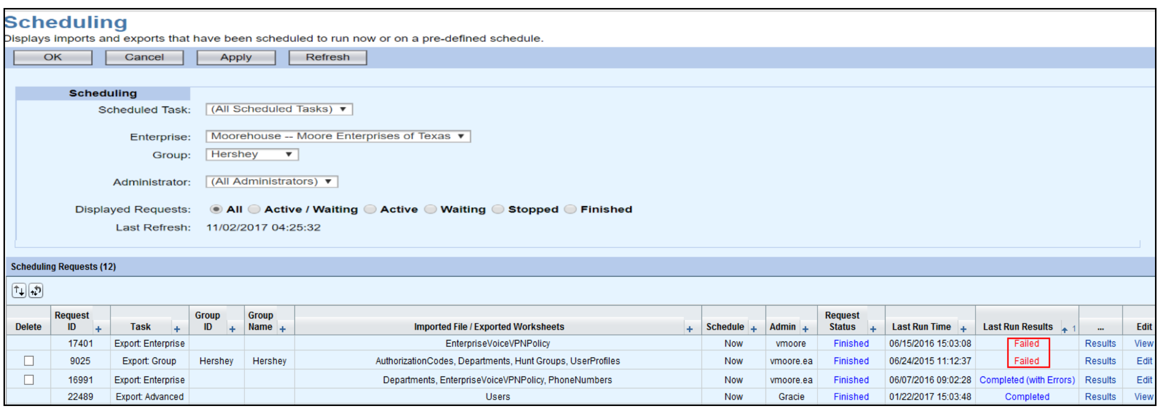


Figure 114 Worksheet Run Failed

3. Click **Refresh** to update the screen.

4. Click on the **Results** link in the row of the schedule for which you would like to see the results.

> **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.

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

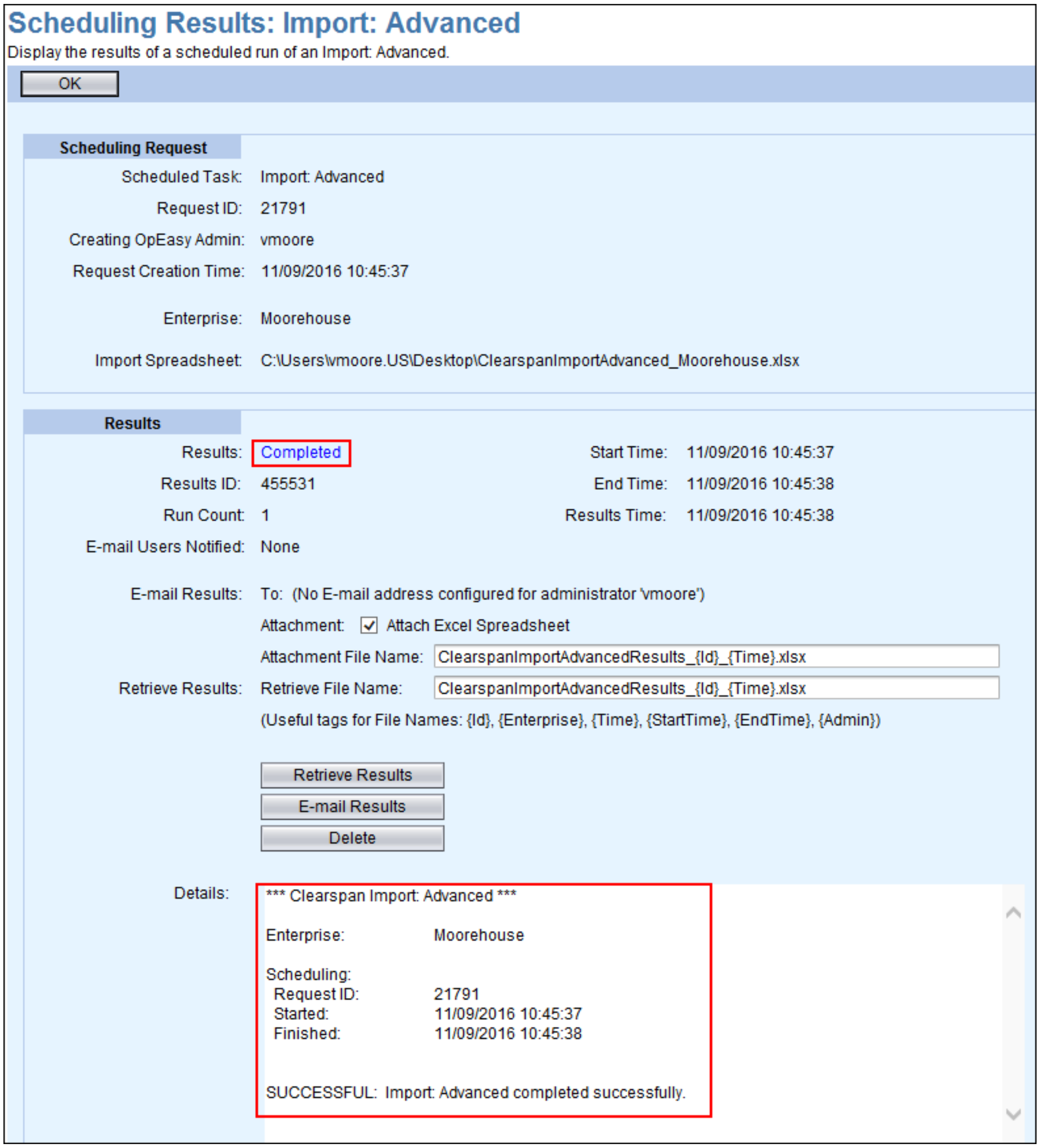


Figure 115 Scheduling Results – Import

RESTARTING A SCHEDULED IMPORT OR EXPORT

1. From the main menu, select **Provisioning** and then **Scheduling**.
2. Click on the **Edit** link in the row of the schedule you want to edit. The Scheduling Request page displays. 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. Check the **Delete** box next to the schedule(s) to delete.

3. Click **Apply** or **OK**. The schedule(s) are deleted from the list.

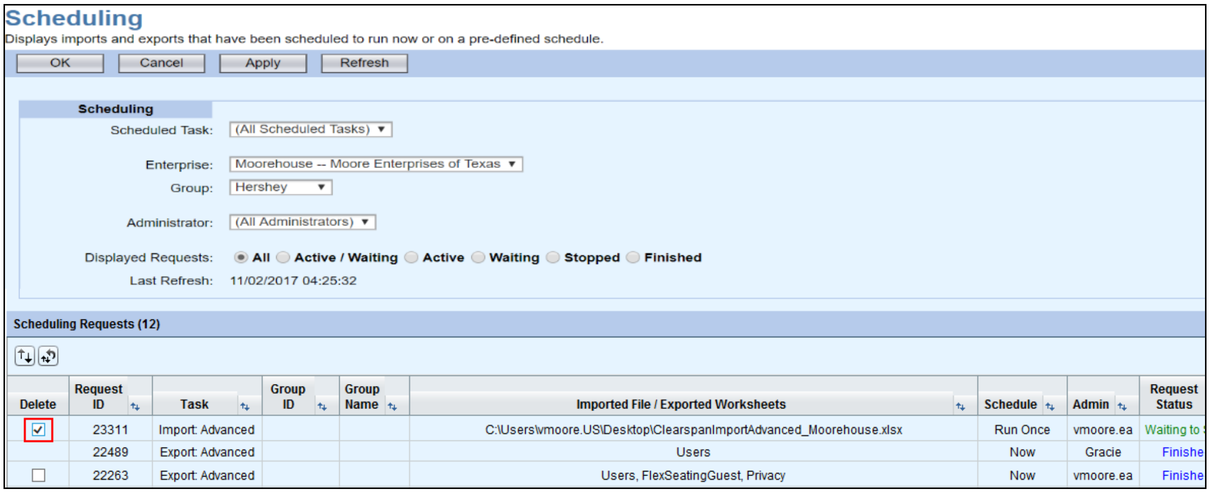


Figure 116 Scheduling Page – Delete

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

You can use Enterprise Settings to add new departments for an Enterprise.

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 **Add**. The Enterprise Departments Add page displays.
5. Enter a **Department Name** and **Parent Department**.
6. 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 the **Edit** link at the end of the row for any Department you want to edit. The Department Modify page displays.
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, etc.

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 displays.
3. 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**.

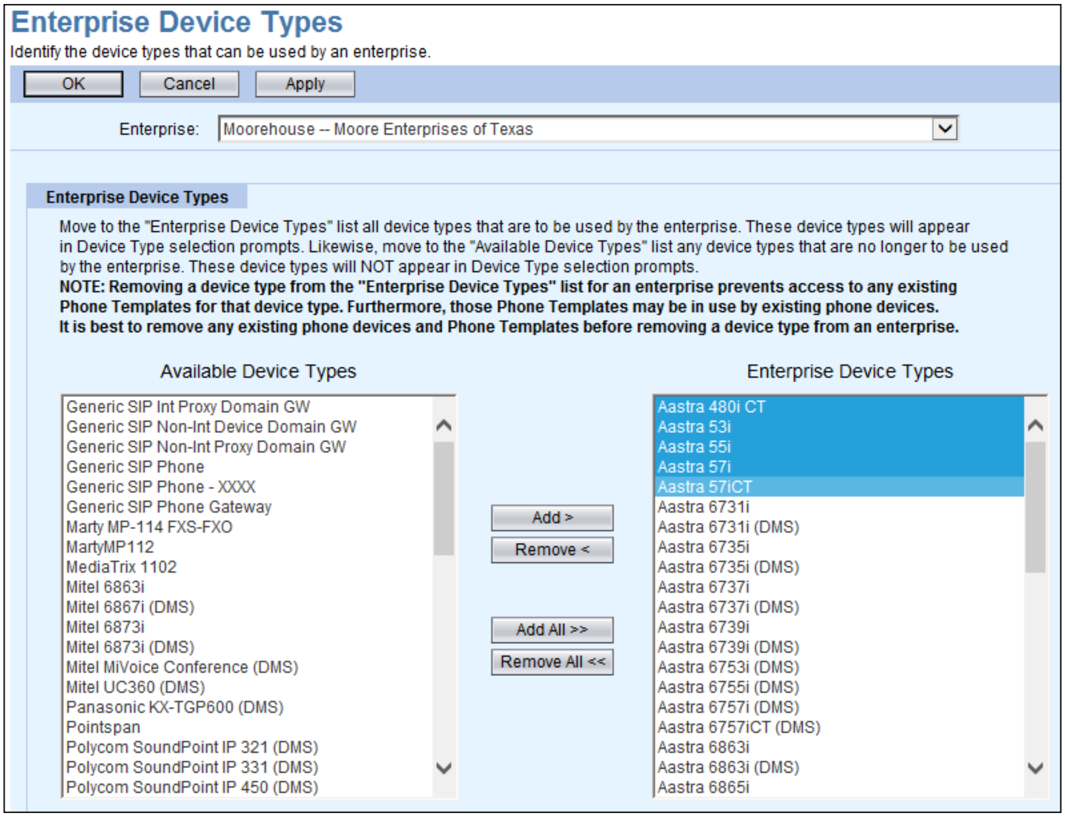


Figure 117 Enterprise Device Types Page

5. 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**.

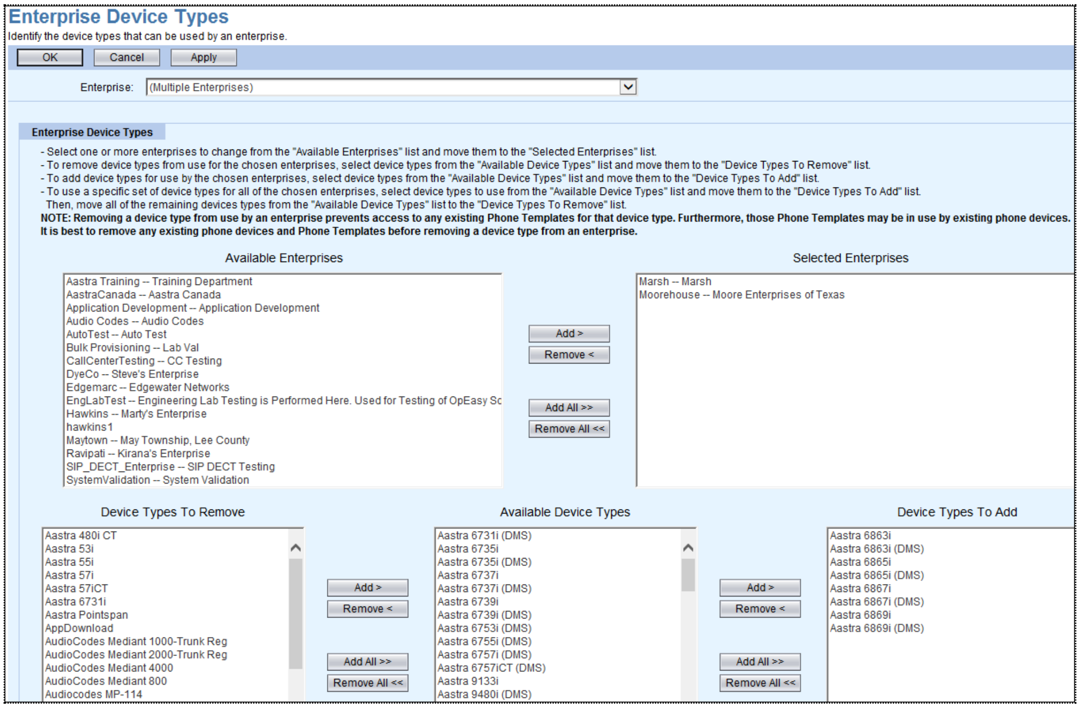


Figure 118 Enterprise Device Types Page – Multiple Enterprises

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 (Aastra) 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 displays.
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 displays.
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, check 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 **Profile Type**.
4. Click the **Edit** link at the end of the row for any profile you want to edit. The Music On Hold Profile Modify page displays.
5. Make changes to the profile, or click **Delete** to delete the profile.
6. 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 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 see the list, and then click **Edit**.

The Enterprise Device Type Tags page displays.

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 displays.
5. Select **Assign to Group**, and choose whether to activate the phone numbers.
6. Enter the ranges of phone numbers to add to the Enterprise.
7. Click **OK**.

VIEWING, MODIFYING, OR DELETING ENTERPRISE PHONE NUMBERS

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. Choose how to display **Phone Number Ranges**:
   - **Displayed by Group**: When this checkbox is enabled, 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 checkbox is not enabled, "(Multiple)" is displayed in the Group column if phone numbers in the range are assigned to different groups or are assigned to the Enterprise. Uncheck this box if you want to see ranges of phones numbers in the Enterprise, without regard to the group assignments.
   - **Displayed by Assigned to User**: When this checkbox is enabled, the display expands to show whether each phone number or range has users assigned. When this checkbox is disabled, "+" is displayed in the Assigned to User column if some phone numbers in the range are assigned to a user while others are not. Uncheck this box if you want to see ranges of phones numbers in the Enterprise, without regard to user assignments.
   - **Displayed by Activated**: When this checkbox is enabled, the display expands to show whether phone numbers have been activated. When this checkbox is disabled, "+" is displayed in the Activated column if some phone numbers in the range have been activated while others have not. Uncheck this box if you want to see ranges of phones numbers in the Enterprise, without regard to whether they have been activated.
5. To delete a phone number range, check the **Delete** checkbox.
6. To edit a phone number range, click the **Edit** link at the end of the row for any phone number range you want to edit. The Enterprise Phone Number Modify page displays. Click **Delete** to delete the phone number range, or make any desired changes 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 displays.

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.

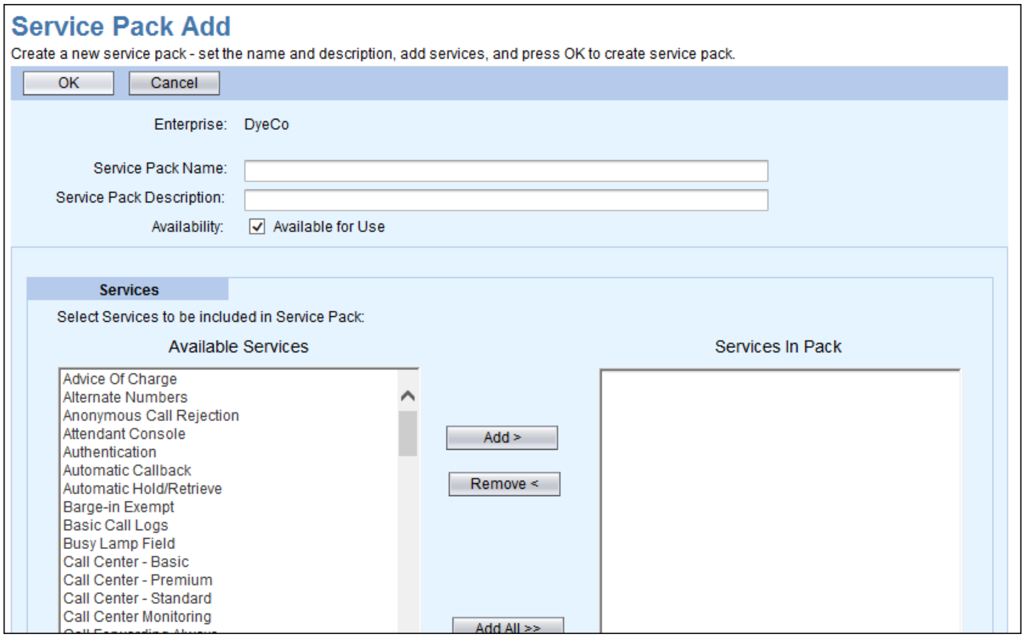


Figure 119 Service Pack Add Page

5. Enter a Service Pack Name and Service Pack Description.
6. Check the **Available for Use** checkbox 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 the **Edit** link at the end of the row for any Service Pack you want to edit. The Service Pack Modify page displays.

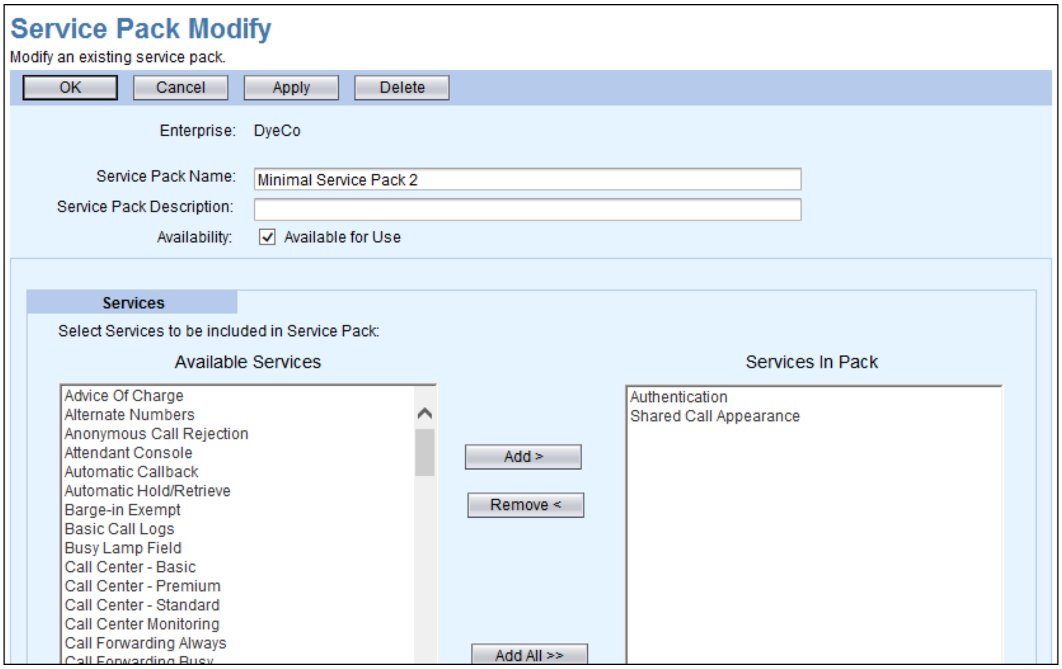


Figure 120 Service Pack Modify Page

6. Click **Delete** to delete the Service Pack, or make any desired 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 displays.
6. Select the checkboxes next to each group that you want to authorize for this Service Pack.
7. Click **OK**.

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**.
2. Select **Authorization Codes**.
3. Select the **Enterprise** and **Group** from the drop-down list, if necessary.
4. Click **Add** to add a new group-level Communication Barring Authorization Code, or click **Delete** at the end of the row for any code you want to remove.
5. Click **OK**.

CONFIGURING CALL PICKUP GROUPS

You can configure the call pickup to enable users to answer any ringing line in their call pickup group.

1. From the main menu, select **Provisioning** and then **Group**.
2. Select **Group Call Pickup**.
3. Select the **Enterprise** and **Group** from the drop-down list, if necessary.
4. Click **Add** to add a new group, or click **Edit** at the end of the row for any group you want to edit.
5. Select a name for the group, and configure the group by adding or removing users. You can also click **Delete** to remove the group.
6. 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 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 desired.
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 for any tag you want to edit. The Group Device Type Tags page displays.
6. Enter a **Tag Name** and **Tag Value**, change the **Tag Value**, or click **Delete** to remove the custom tag.

7. 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, check 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.
4. 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 all of 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**.
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 displays.
7. Check the **Enabled** box.
8. Enter the Server URI, Server RootDN, Server UserId, and 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 desired: 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 displays with 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 on the **Edit** link in the first column or last column of the display. The Phone Directory Modify page displays. 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 displays.
5. Click the **Delete** button. The delete warning dialog box displays.
6. Click **OK**. The server is deleted.

VIEWING, ASSIGNING, OR UNASSIGNING 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 checkbox is enabled, the display expands to show whether each phone number or range has users assigned. When this checkbox is disabled, "+" is displayed in the Assigned to User column if some phone numbers in the range are assigned to a user while others are not. Uncheck this box if you want to see ranges of phones numbers in the Group, without regard to user assignments.
   - **Displayed by Activated**: When this checkbox is enabled, the display expands to show whether phone numbers have been activated. When this checkbox is disabled, "+" is displayed in the Activated column if some phone numbers in the range have been activated while others have not. Uncheck this box if you want to see 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** checkboxes to change how the phone numbers are displayed.
6. To unassign a phone number or range, check the **Unassign** checkbox.
7. To edit a phone number range, click the **Edit** link at the end of the row for any phone number range you want to edit. The Group Phone Number Modify page displays. Click **Unassign** to unassign the phone number range, or make any desired changes and click **OK**.
8. 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 **Add**. The Group Phone Number Add page displays.
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 displays.
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 displays.
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 displays.
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 **Edit** 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 checkbox 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 displays.
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 Polycom Phones

OpEasy tracks the maximum number of users and Polycom phones that administrators are allowed to manage using OpEasy. Solution Reseller administrators can allocate the system user licenses and Polycom phone licenses to their Enterprises as needed. If an administrator attempts to add or modify users or Polycom 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 Polycom 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 displays. It shows the total number of OpEasy user and Polycom phone licenses, as well as how many are unallocated. **Total Available** is the total number of unused and available OpEasy licenses (User or Polycom 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 Polycom Phone) but does NOT include any 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.

Note: If **Polycom Premium Support** is selected for an Enterprise, the Polycom license allocation is always set to **Auto**.

For any Enterprise using Manual license allocation, set the number of **Allocated** user and Polycom phone licenses for each Enterprise. The number of **Available** licenses updates when you click **Refresh**. The Clearspan User Count and Clearspan Polycom Phone Count columns show the total number of licensed users and Polycom phones within Clearspan for that Enterprise.

3. Click **OK** or **Apply**.

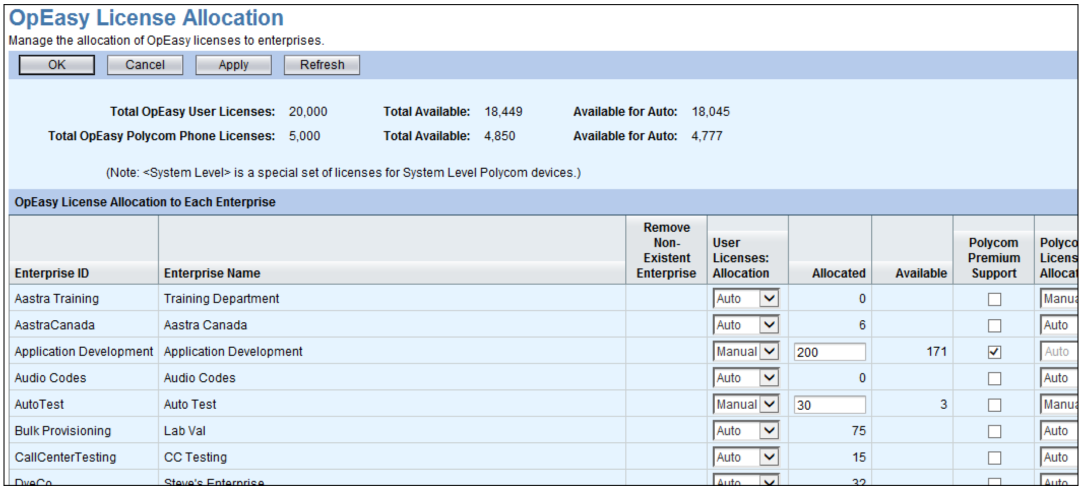


Figure 121 OpEasy Licensing Page

MANAGING UNIQUE IDS

OpEasy allows you to assign IDs at the System, Enterprise, and Group IDs that are prepended or appended 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 displays.
2. Specify the **Unique ID Length** of 4 to 7 digits.
3. Select the **Unique ID Position**, either **Before the Extension** or **After the Extension**.
4. Enter a **System Unique ID**, a unique ID for System-level devices.

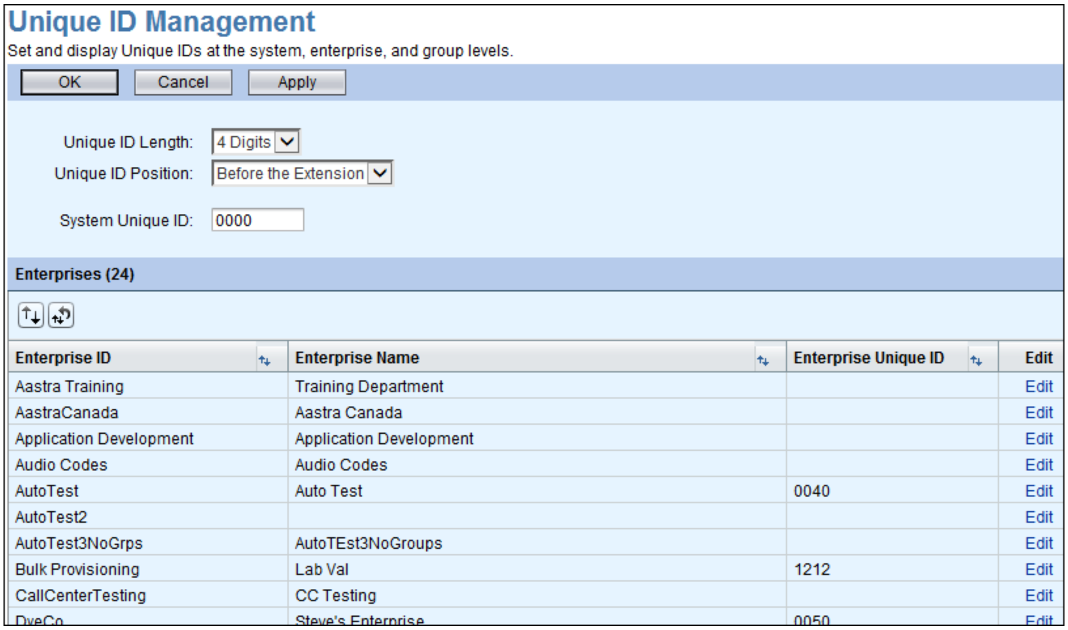


Figure 122 OpEasy Licensing Page

5. Click the **Edit** link to enter an **Enterprise Unique ID** on the Unique ID Management: Enterprise page.
6. On the Unique ID Management: Enterprise page, click the **Edit** link to enter a **Group Unique ID**.
7. Click **OK**.

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
- 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 Mitel Support Administrators
- View OpEasy administrator accounts by
    - All accounts
    - Mitel Support Administrators only
    - Administrator status (i.e. Active, Logged-In, Logged-Out, Locked or Disabled)

ADDING OR MODIFYING AN ADMINISTRATOR ACCOUNT

1. From the main menu, select **Login Management**.

The OpEasy Login Management page displays. You can 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.

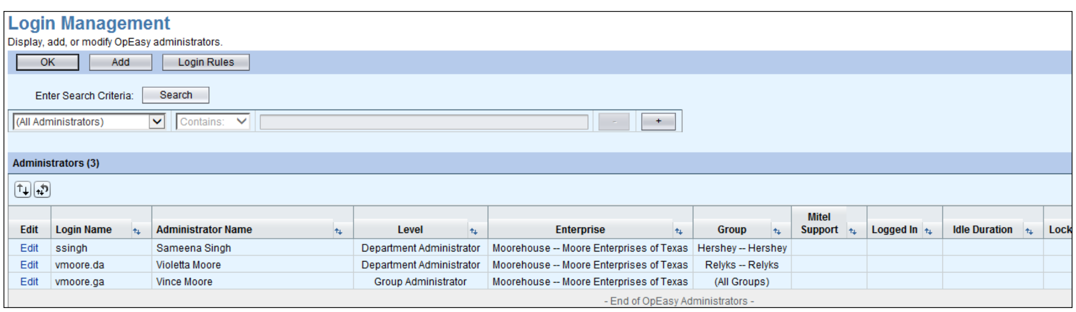


Figure 123 OpEasy Login Management Page

2. Click **Add** to create a new administrator account, or click **Edit** at the end of any row to modify an administrator account. The OpEasy Administrator page displays.

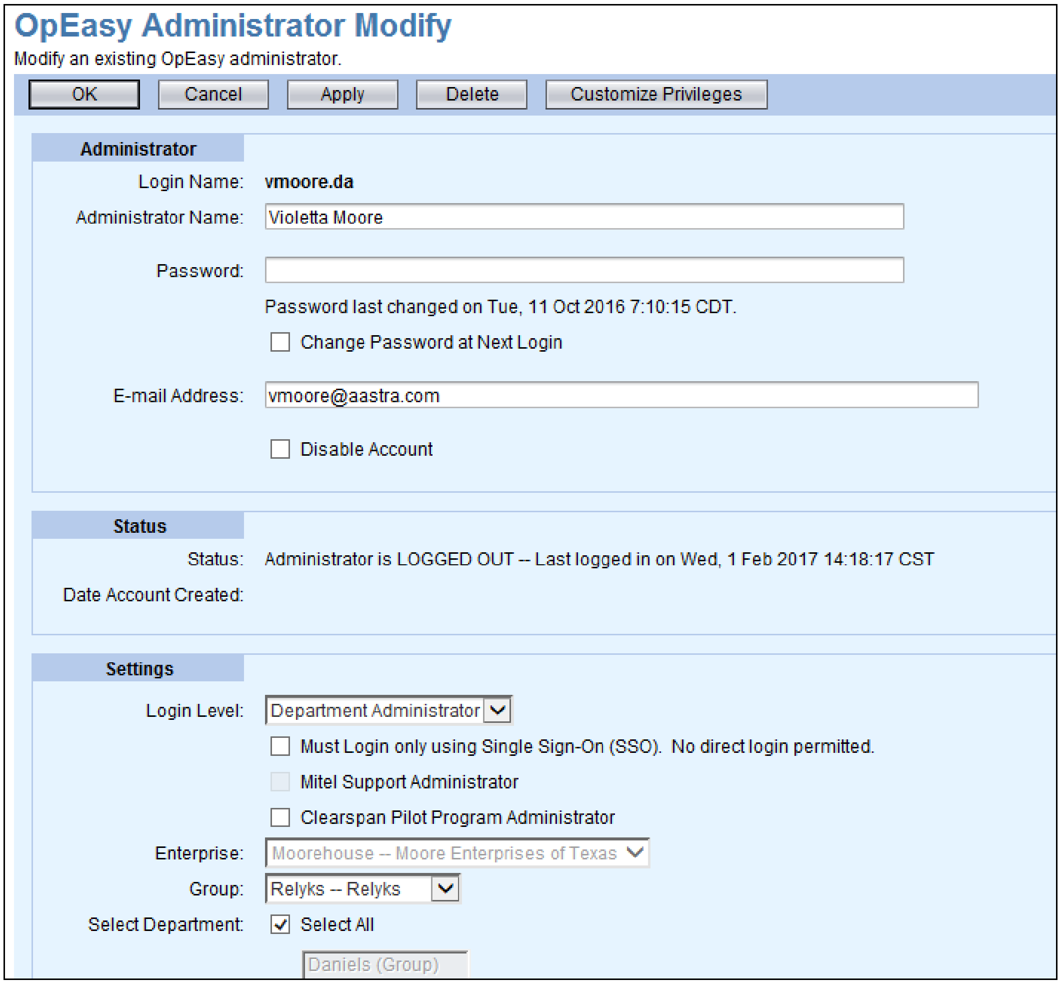


Figure 124 OpEasy Administrator Modify Page

3. 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 than the administrator's name.

4. Enter a **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

5. Enable **Change Password at Next Login** if you want this administrator to be required to change the account password at the next login.

6. Enter the administrator's **E-mail Address**.

7. You can check the **Disable Account** setting to disable this administrator's account without deleting it.

8. Set the administrator’s **Login Level**.
9. Enable **Must Login only using Single Sign-On (SSO)** to prohibit the administrator from logging in directly to OpEasy.
10. Choose selections for **Mitel Support Administrator**, **Clearspan Pilot Program Administrator**, **Enterprise**, **Group**, and **Department**, if those settings are configurable for this administrator.
11. Click **Customize Privileges** if you want to change the privileges for this administrator.
12. Click **OK** or **Apply**.

MODIFYING ADMINISTRATOR LOGIN RULES

1. From the main menu, select **Login Management**.
2. Click **Login Rules**.

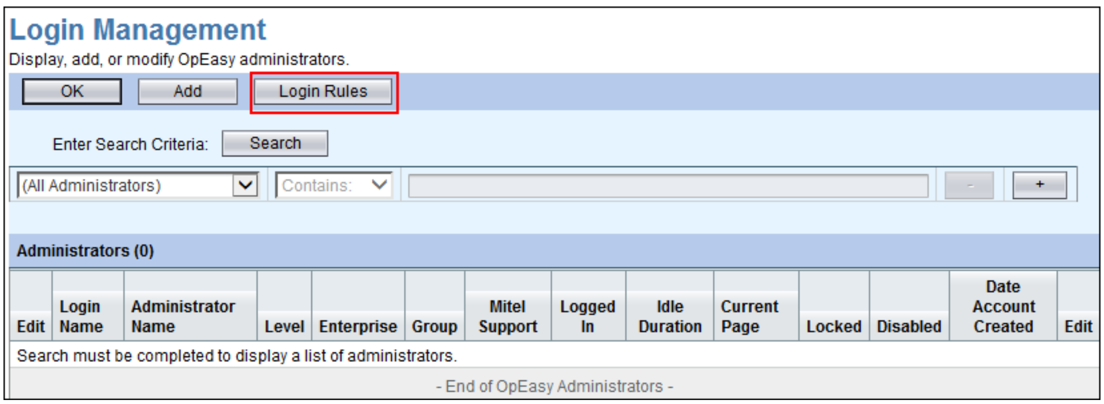


Figure 125 OpEasy Login Rules

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.

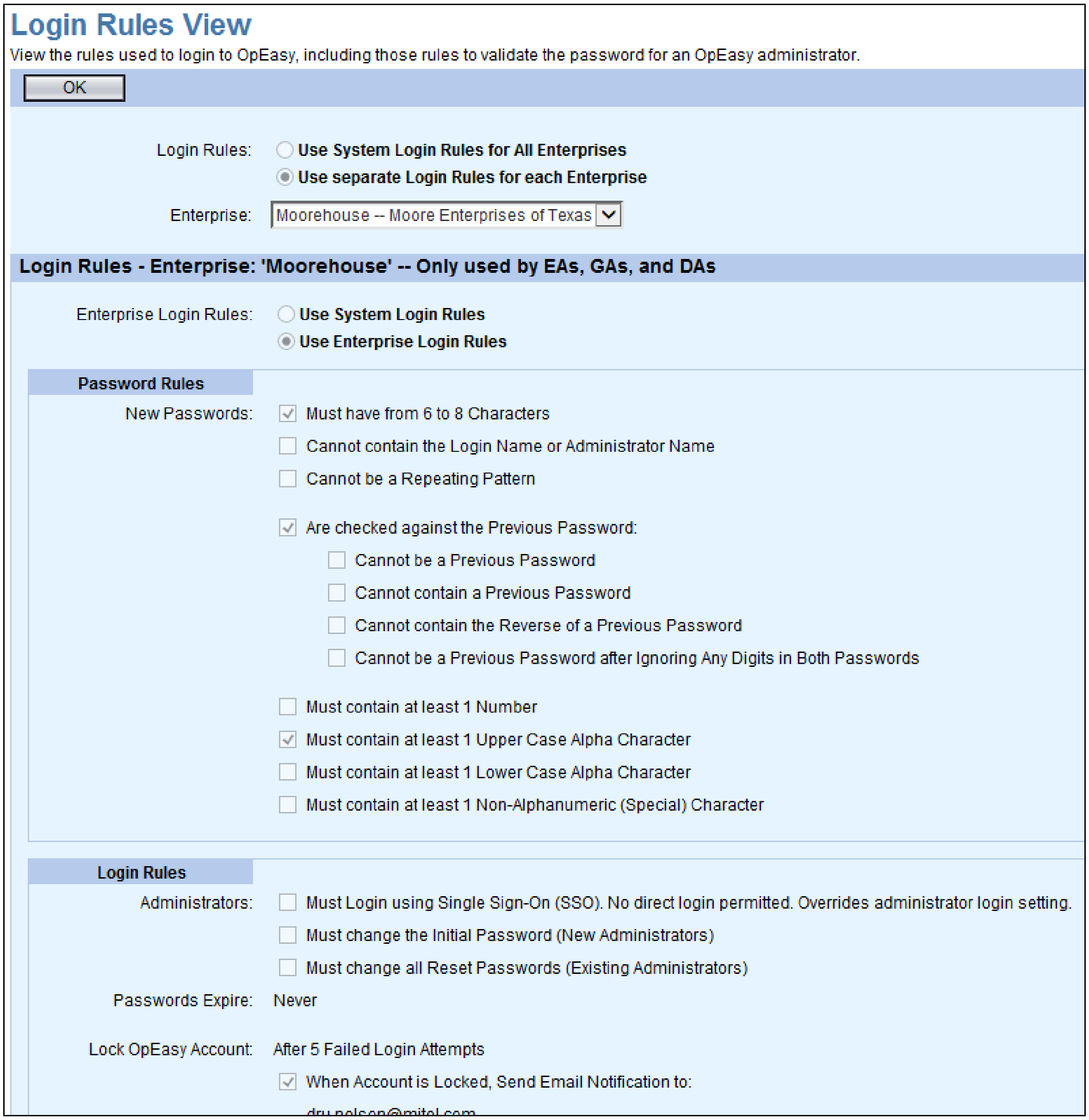


Figure 126 OpEasy Login Rules View

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, etc. 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 in order 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 (Aastra) Phone

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”.

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”.

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. Once the restart completes, the phone is ready for use.

REPLACE A PHYSICAL PHONE WITH THE SAME TYPE OF PHONE

Follow these steps to replace a physical phone with a phone of the same type, using the same the Clearspan device.

1. Power down and remove the original physical phone from the network.
2. Using OpEasy, navigate to **Provisioning | Users**, and modify the user associated with the device you want to replace.
3. From the User Modify page, select the **Phones** tab and click **Edit** for the device that is to be replaced.
4. The User: Primary Phone Device Modify page presents. Modify the MAC Address field as specified below and save the change:

   For Mitel (Aastra) phones, do one of the following:

   - Set the MAC Address field to an Auto Install Device ID. This causes the user to be prompted for the Auto Install Device ID after the replacement phone is connected to the network. This method is useful when you do not know the phone’s MAC.
   - Set the MAC Address field to the MAC of the replacement phone. Using this method, the replacement phone automatically retrieves its configuration without the need for the phone user to enter anything.

   For Polycom phones, do one of the following:

   - Clear the MAC Address field. This is easiest to configure because you do not need to know the replacement phone’s MAC address, but it does not reserve the Clearspan device for the replacement phone.
   - Set the MAC Address field to the MAC of the replacement phone. This requires knowledge of the replacement phone’s MAC address, but reserves the Clearspan device for that specific phone.

5. Power up and connect the replacement phone to the network.

6. Factory default the replacement phone.

For Mitel (Aastra) phones:

- When the MAC Address field is set to an Auto Install Device ID:

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 previously set for the Clearspan device and press the button labeled “Done”.

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”.

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.

Once the restart completes, the phone is ready for use.

- When the MAC Address field is set to the MAC of the replacement phone:

During the startup process, the replacement phone is automatically updated with the configuration that was used by the original phone.

Once the startup completes, the phone is ready for use.

For Polycom phones:

a. After the startup process completes, the ‘QSetup’ button appears on the phone.
b. 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.

c. Confirm the changes when prompted and the phone restarts.
d. During the restart process, the replacement phone is updated with the configuration that was used by the original phone.
e. Once 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 displays. 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 also 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 displays. The Phone Device field defaults to (New Phone Device).
    - If you wish 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 desired phone. Note that the Device Level, Device Type, Template and MAC Address should be populated because this device was previously created.
7. Once all fields for the new device are set as desired, click **OK** twice. The Advanced: User Modify page displays. 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:
  1. For the device or devices that are to be disassociated, use the “ModifyDevice” command.
  2. Enter the text “null” in the MAC Address column(s).
  3. 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 LineId Last Name** and **Calling LineId 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’, ‘Mail Server User Id’ and ‘Mail Server Password’ 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 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.
- User General Settings – The E-mail message sent to new Polycom phone users will be different from the message sent to Mitel (Aastra) 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 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.

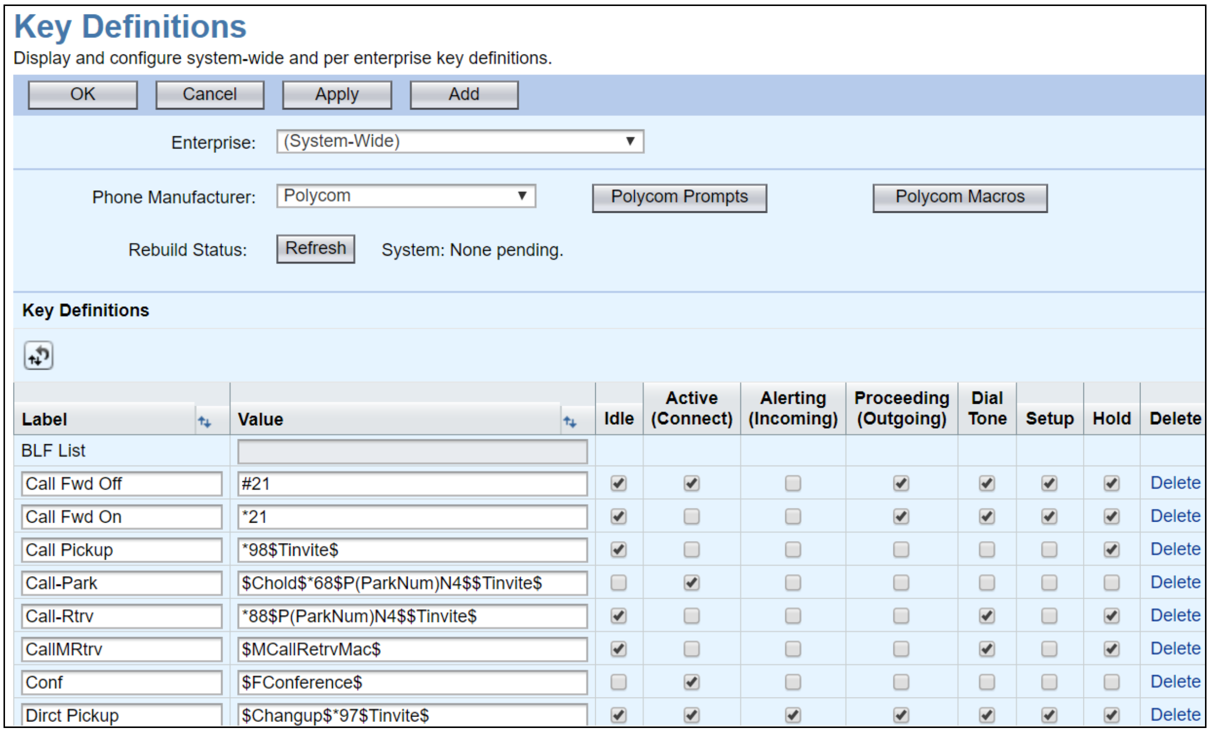


Figure 127 Key Definitions for Polycom Phones

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 *Polycom UC Software Administrator's Guide*.
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** checkbox indicates whether the response is visible on the phone's display or is shown as asterisks.

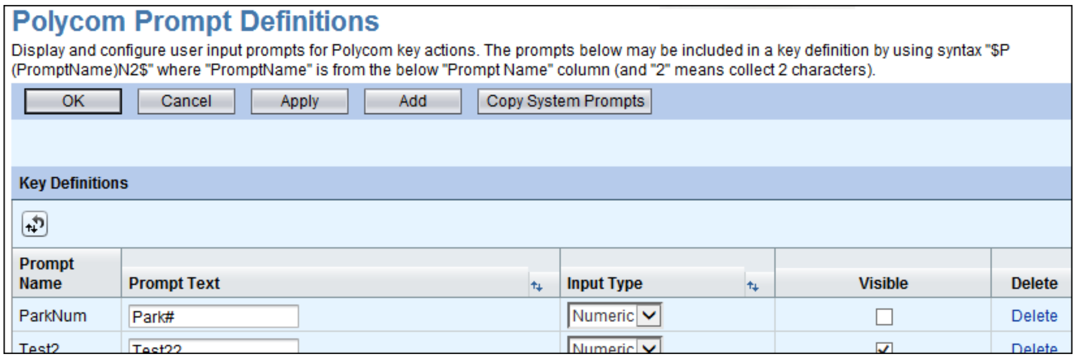


Figure 128 Polycom Prompt Definitions Page

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*.

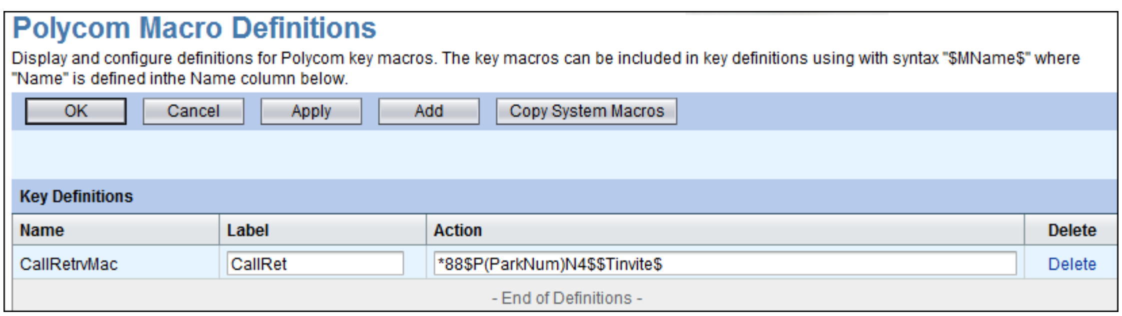


Figure 129 Polycom Macro Definitions Page

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.

FIELD	SETTING
SIP Settings	
Outbound Proxy	Enter the hostname or IP address of the outbound proxy server used by the Polycom phones.
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	Check the CDP Enabled field if CDP is supported by the network, which is normal.
LAN Port Mode	Select the LAN speed, normally Auto.
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 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 port number defaults to 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, and then select **Global Settings**. The extra settings must exist for the Polycom phones and are in an XML format, as are all Polycom phone settings.

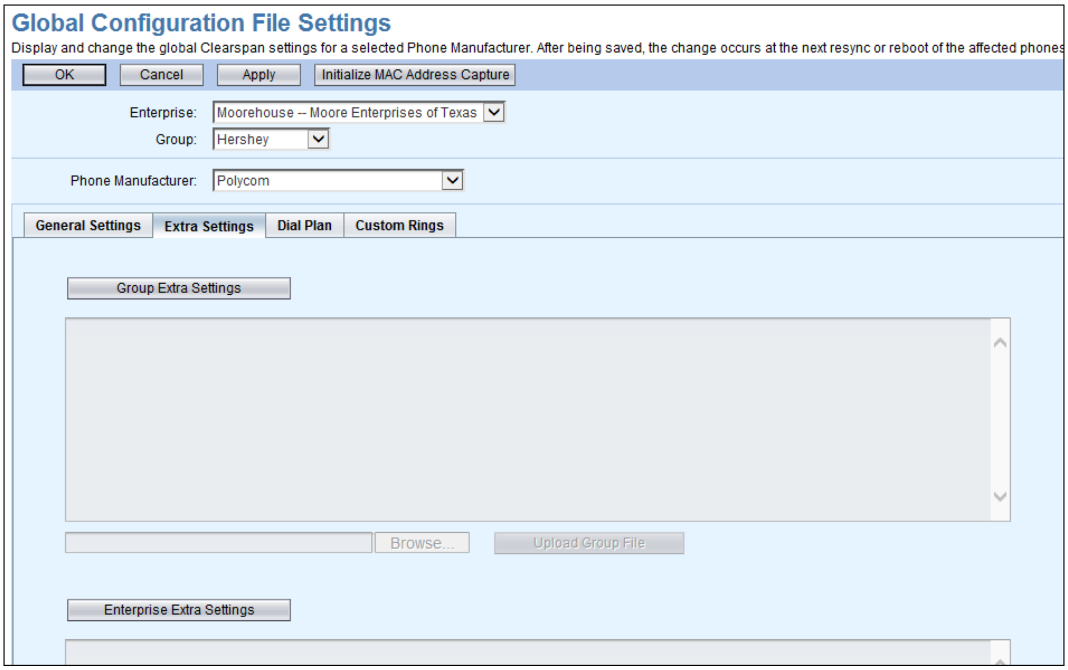


Figure 130 Global Settings for Polycom Phones

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. 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 displays.

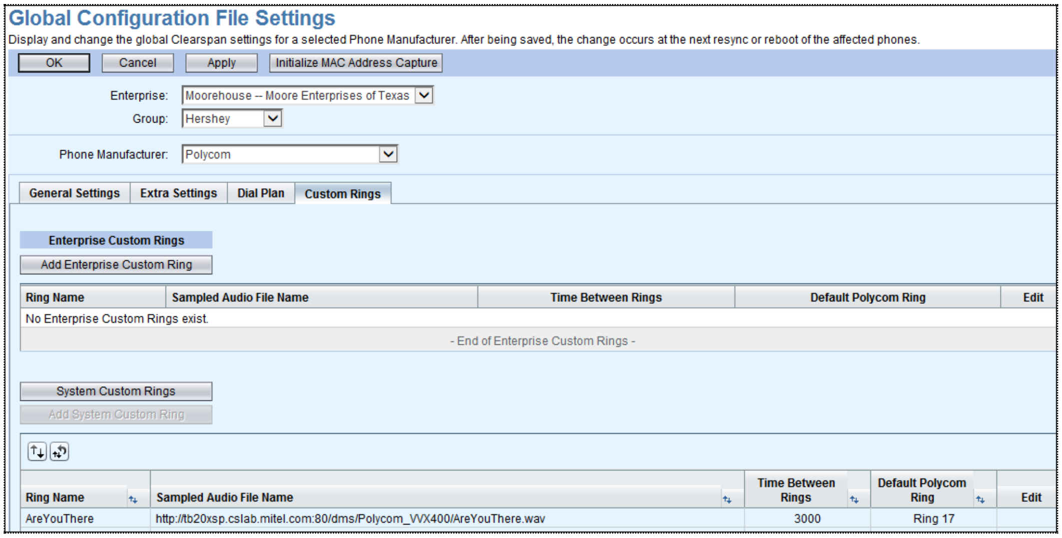


Figure 131 Custom Rings for Polycom Phones

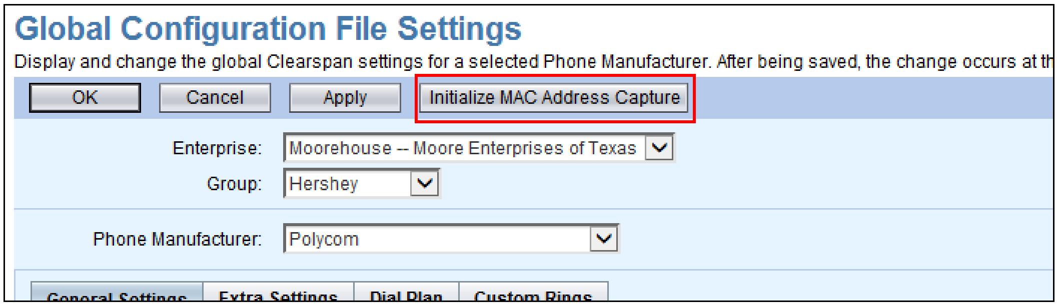
Click the button to show either **Enterprise Custom Rings** or **System Custom Rings**. Click **Edit** in the table to change an existing custom ring, or click the appropriate **Add Custom Ring** button to create a new custom ring.

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. For example: http://tb20ews1.mitel.com:80/Polycom/AreYouThere.wav
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.



Phone Templates: Definitions for Polycom Phones

As with Mitel (Aastra) 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.

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	Check the “Use VLAN” checkbox 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.

TAB / SECTION	FIELD	SETTING
	Outbound Proxy	Enter the proxy information for this phone if you want it to appear in the Edge Device Utilization report.
	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 uncheck the **Use Global Settings** check box and enter the subscription time in seconds.
Polycom Settings	Voice Volume Persistent	Check 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	Check 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	Check the 'RTCP Extended Reports (RTCP XR) Enabled' checkbox 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.
	Background Image URL	Enter the address and/or name of the image used for the background display on a VVX phone. This field does not apply to SoundPoint or SoundStation phones.
	Idle Display Image URL	Enter the address and/or name of the image used for the idle display on a SoundPoint or SoundStation phone. 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 desired setting. The value is used to identify which line will be associated with the BLF list URI.
	Max Calls Per Line	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 300/301/310/311 = 24 VVX 400/401/410/411 = 24 VVX 500/501/600/601 = 24
	Clearspan Line Position	Select the **Clearspan Line Position** that you want to assign. This is the Clearspan line to use for the **Phone**

TAB / SECTION	FIELD	SETTING
		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 **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}".
	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 custom rings are setup on the Ring tab.
	Missed Call Tracking	Determines whether the phone displays an updated count of missed calls and a Missed Call 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 be assigned as a Line, BLF List, or Favorites. At least one Line key must be assigned to the phone on the template Phone Keys tab. Otherwise, leave the setting Disabled to have the phone automatically assign the keys. When keys 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 this option is checked, the Callers soft key appears on the phone so the user can see the list of received calls.
	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.

TAB / SECTION	FIELD	SETTING
	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** and, finally, the **Floating – after 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.
	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		
Enabled Features	ACD Agent	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. Available on SoundPoint® IP 320, 321, 330, 331, 335, 450, 550, 560, 650, and 670 desktop phones; VVX 101, 201, 300/301/310/311, 400/401/410/411, 500/501, 600/601, 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

TAB / SECTION	FIELD	SETTING
		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 101, 201, 300 / 301 / 310 / 311, 400 / 401 / 410 / 411, 500 / 501, 600 / 601 phones.
	ACD Agent Unavailable with Reason Codes	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. Available on SoundPoint® IP 320, 321, 330, 331, 335, 450, 550, 560, 650, and 670 desktop phones; VVX 101, 201, 300 / 301 / 310 / 311, 400 / 401 / 410 / 411, 500 / 501, 600 / 601phones.
	Audio/Video Toggles	On the VVX 500/501 and VVX 600/601 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 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 Directory	Allows an LDAP directory key to be programmed on Polycom phones.
	Directory	Enables the display and entry of directory entries into a directory local to the phone using the Directory soft key.
	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 guest 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,

TAB / SECTION	FIELD	SETTING
		201, 300 / 301 / 310 / 311, 400 / 401 / 410 / 411, 500 / 501, 600 / 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.
	N-Way Conference	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.
	Picture Frame	On the VVX 500/501 and VVX 600/601 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, and 650 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 and VVX 600/601 phones with a camera only, enables video in calls.
Ring		
	Custom Rings	Selects the custom ring to assign to each of the 10 custom rings (Ring 15 through Ring 24). 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 must exist for the Polycom phones and are in an XML format, as are all Polycom phone settings.

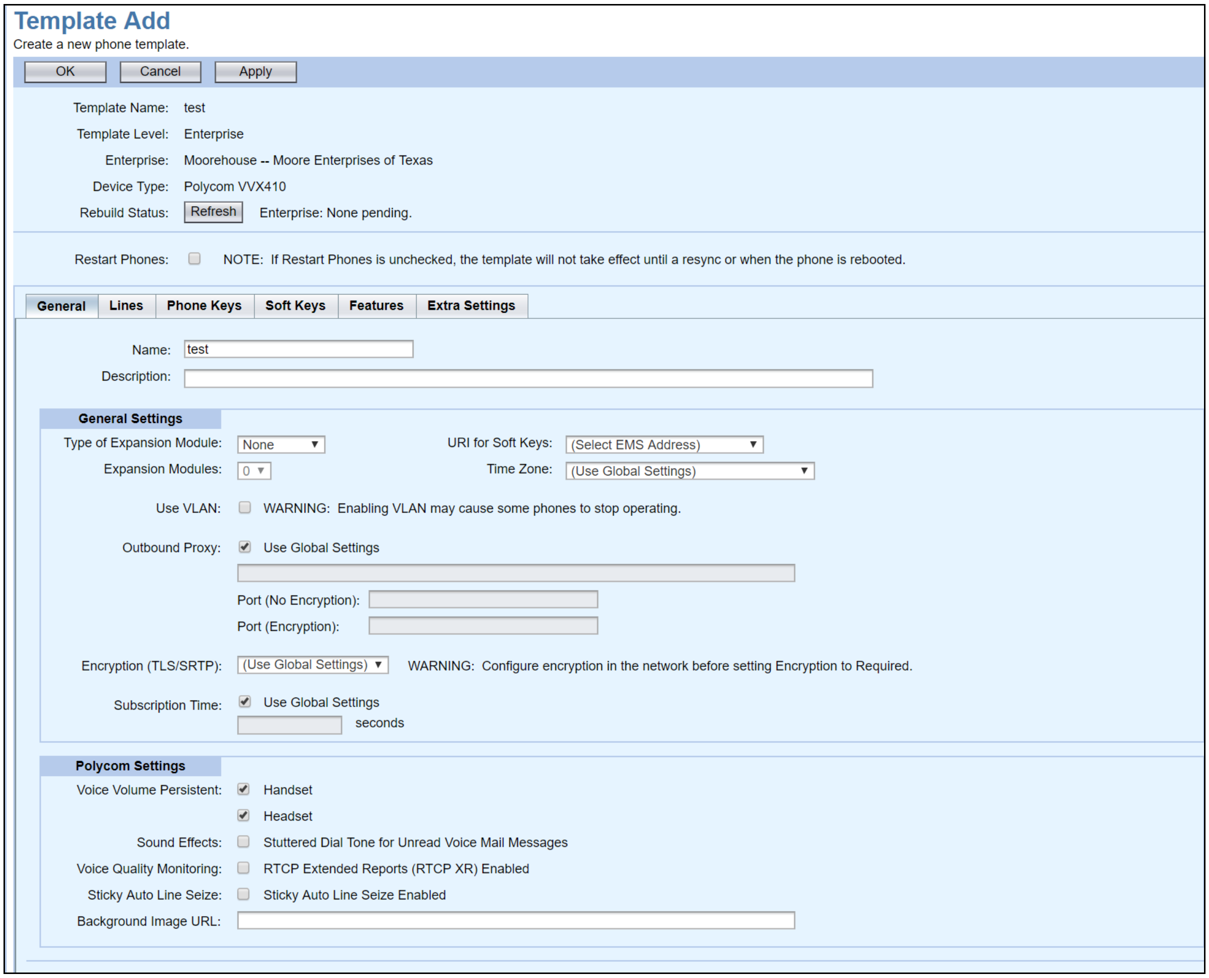


Figure 132 Template Add - General for Polycom Phones

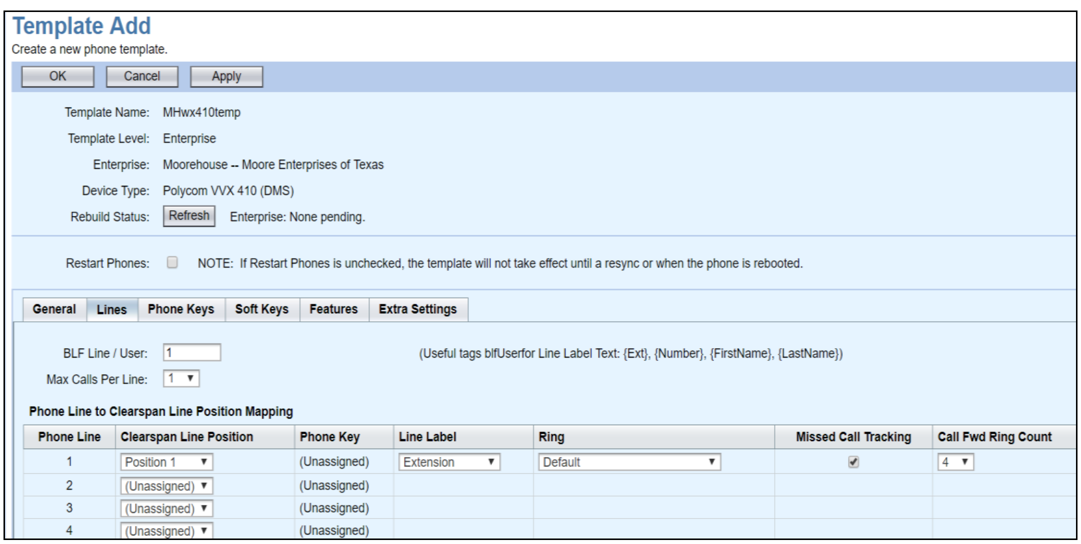


Figure 133 Template Add – Lines for Polycom Phones

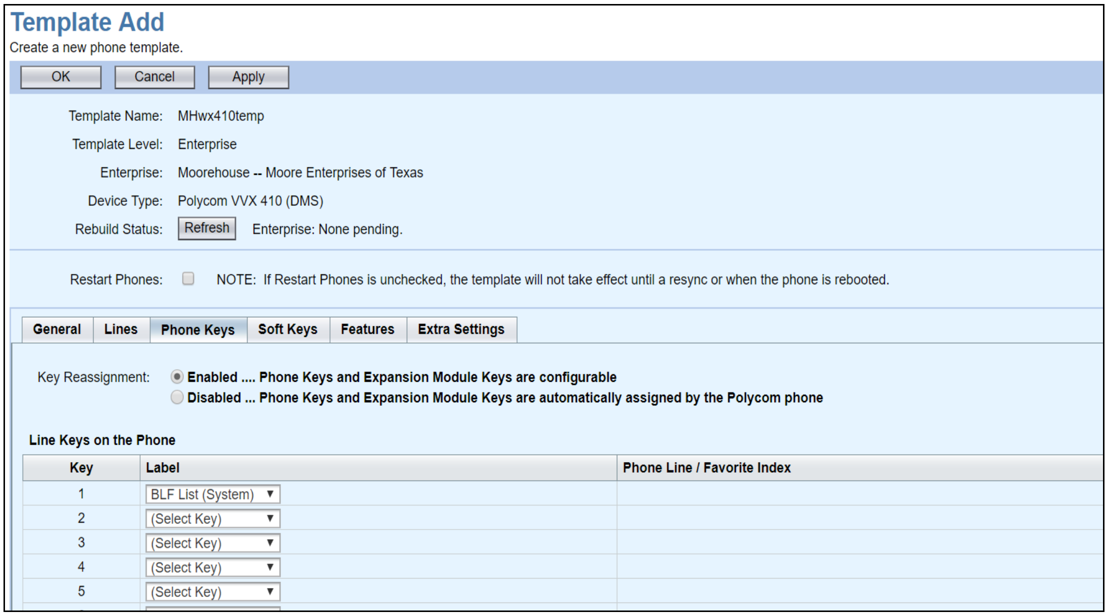


Figure 134 Template Add – Phone Keys for Polycom Phones

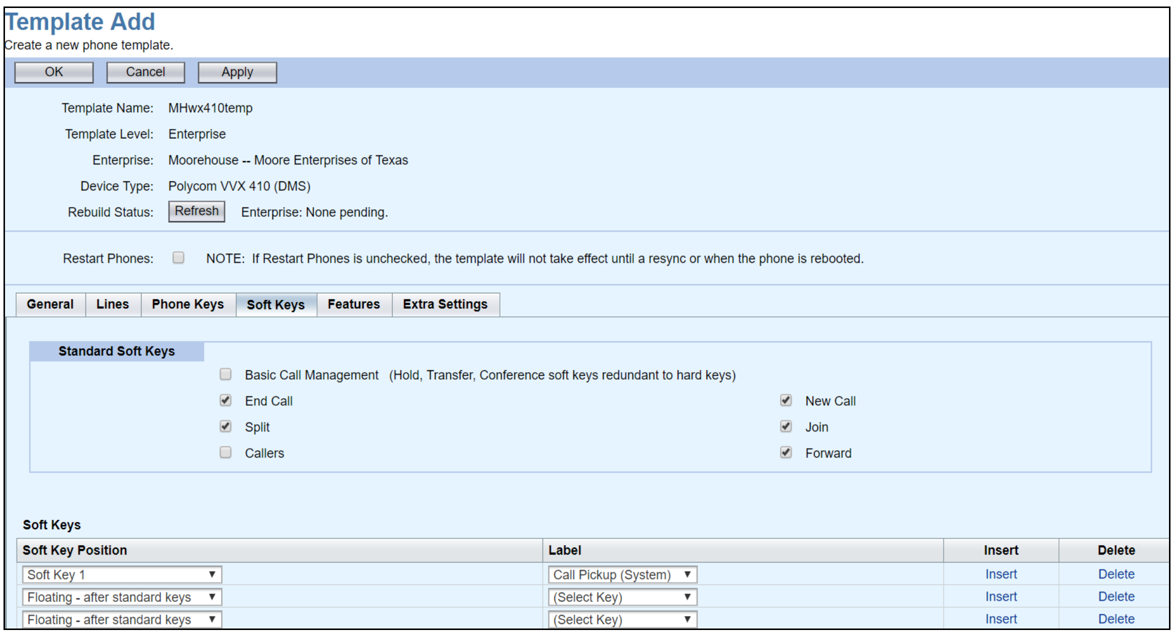


Figure 135 Template Add – Soft Keys for Polycom Phones

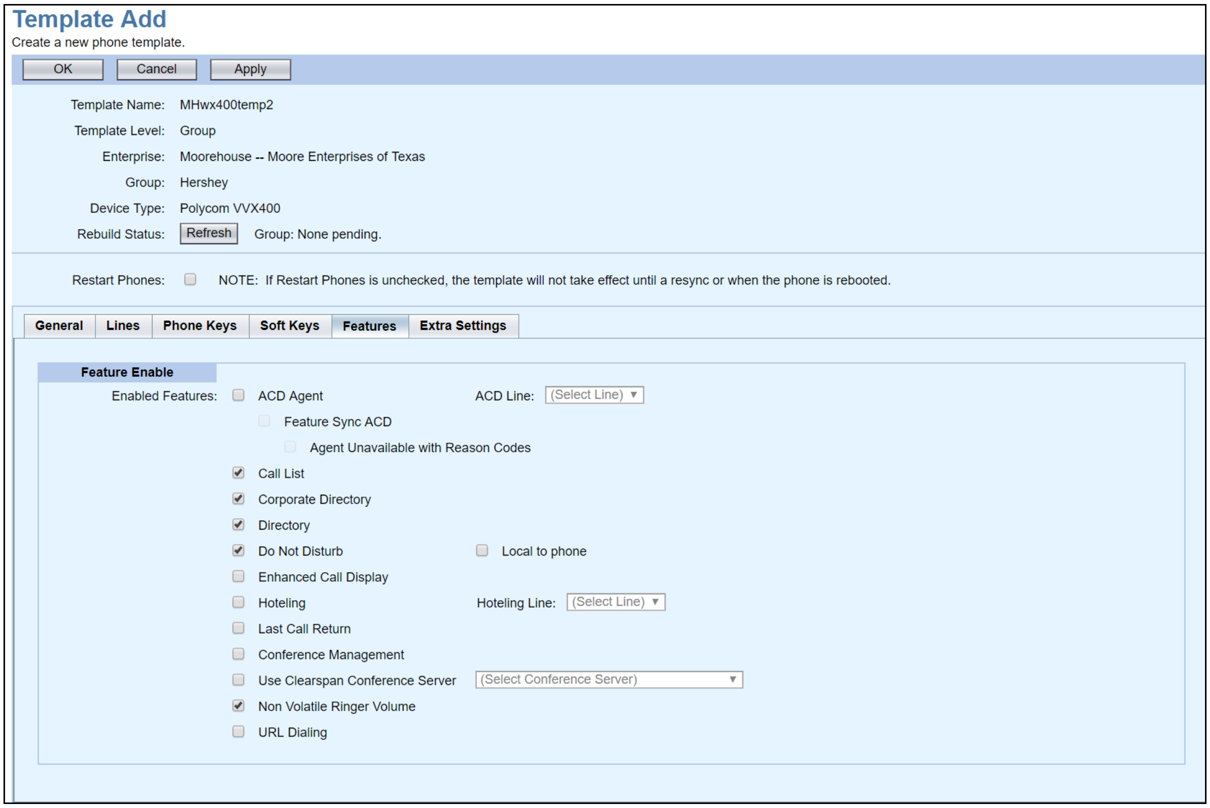


Figure 136 Template - Features for Polycom Phones

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 Polycom Phone License is required for each added or modified Polycom phone. An error message displays 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.

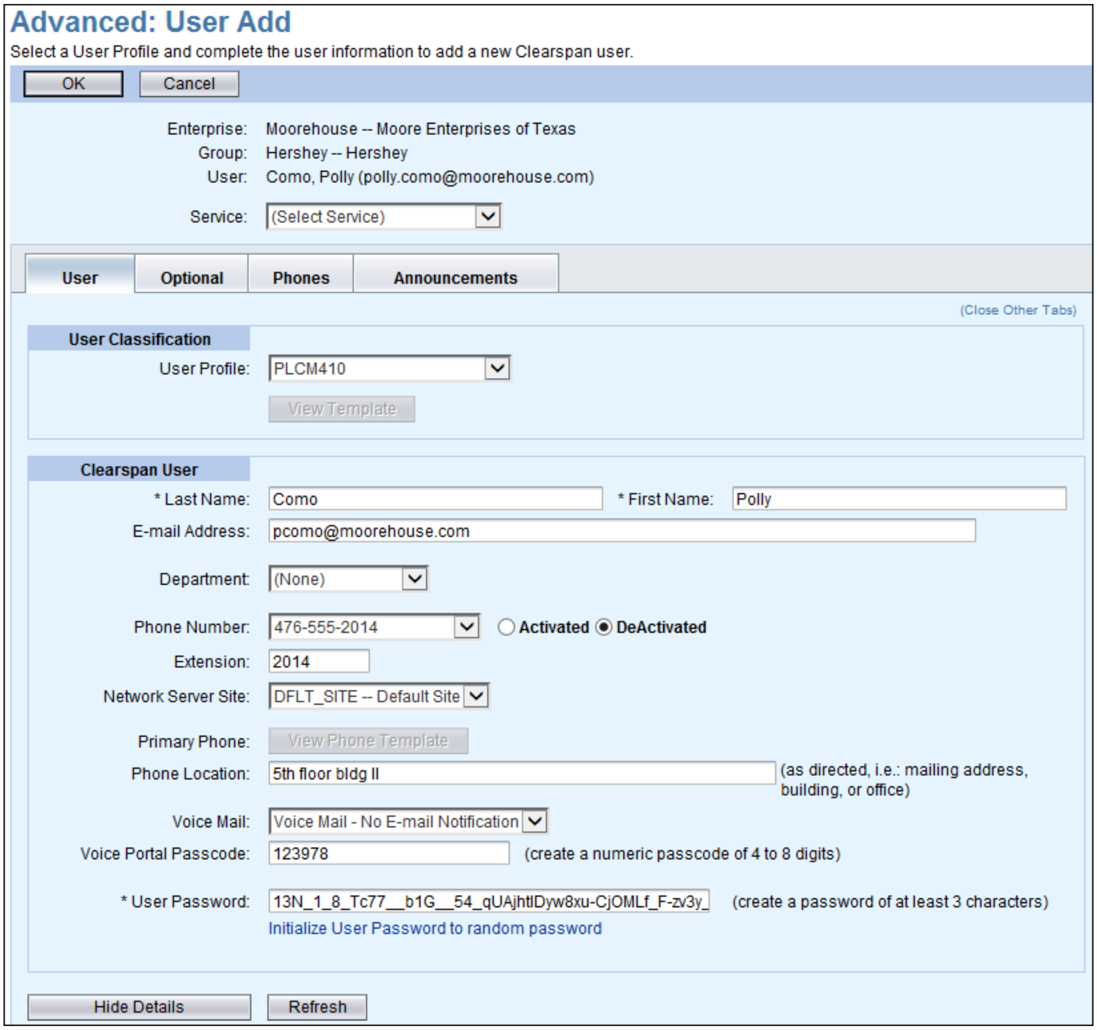


Figure 137 Advanced User Add for Polycom Phones (Top)

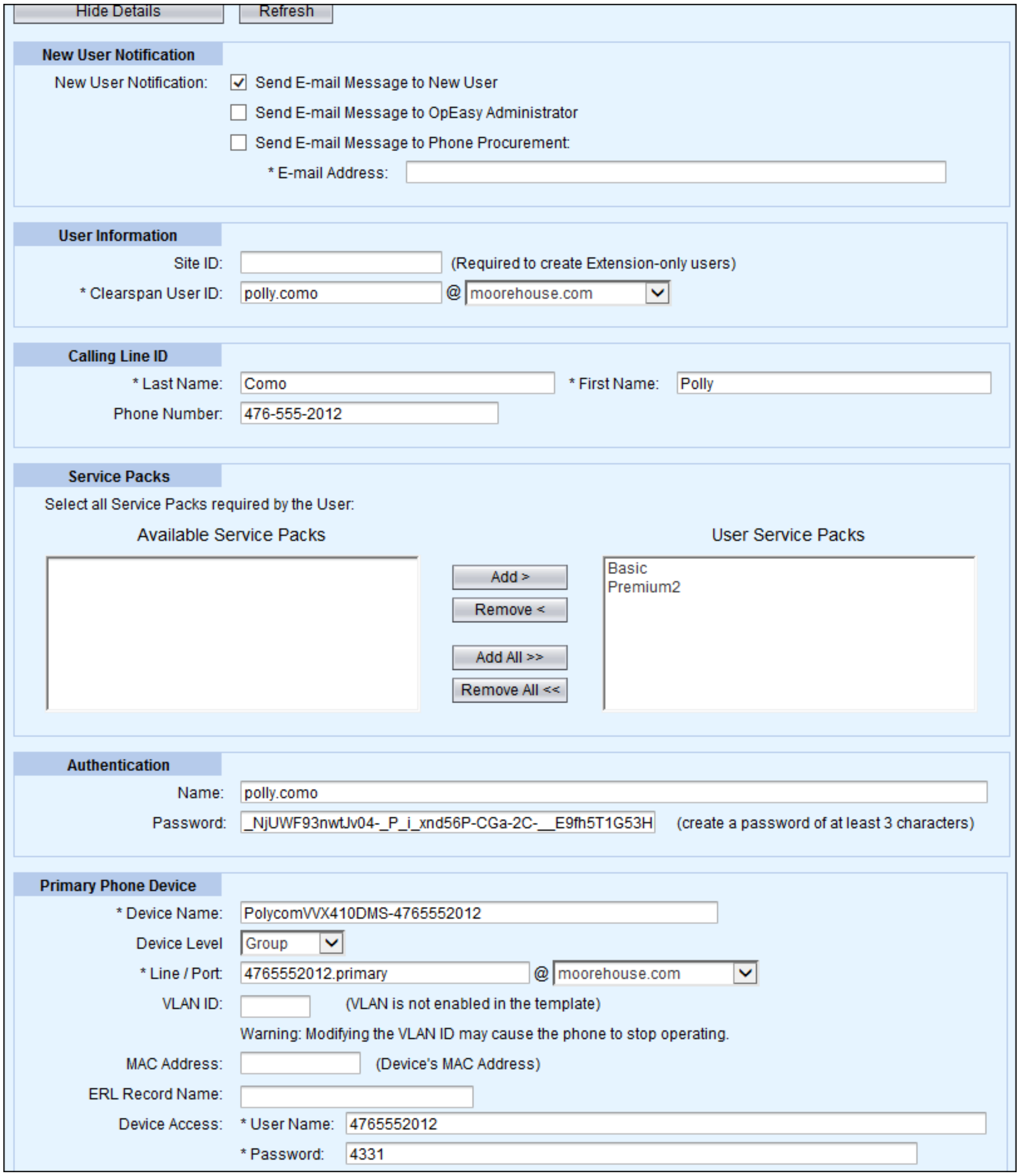


Figure 138 Advanced User Add for Polycom Phones (Bottom)

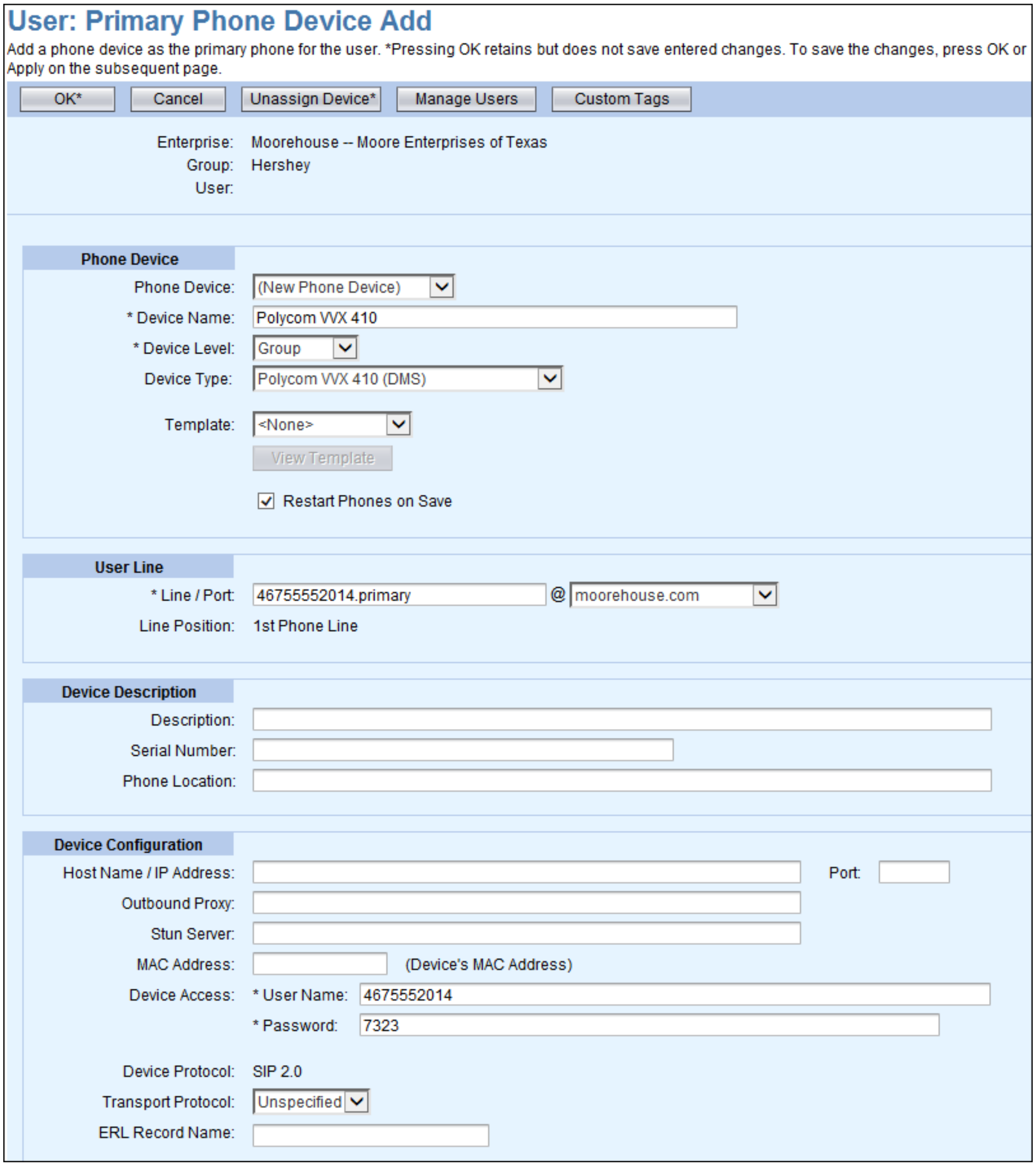


Figure 139 User Primary Phone Device Settings for Polycom Phones

User General Settings for Polycom Phones

As with Mitel (Aastra) 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. Change the new user E-mail message as you would for a Mitel phone, with the text appropriate for a Polycom phone.

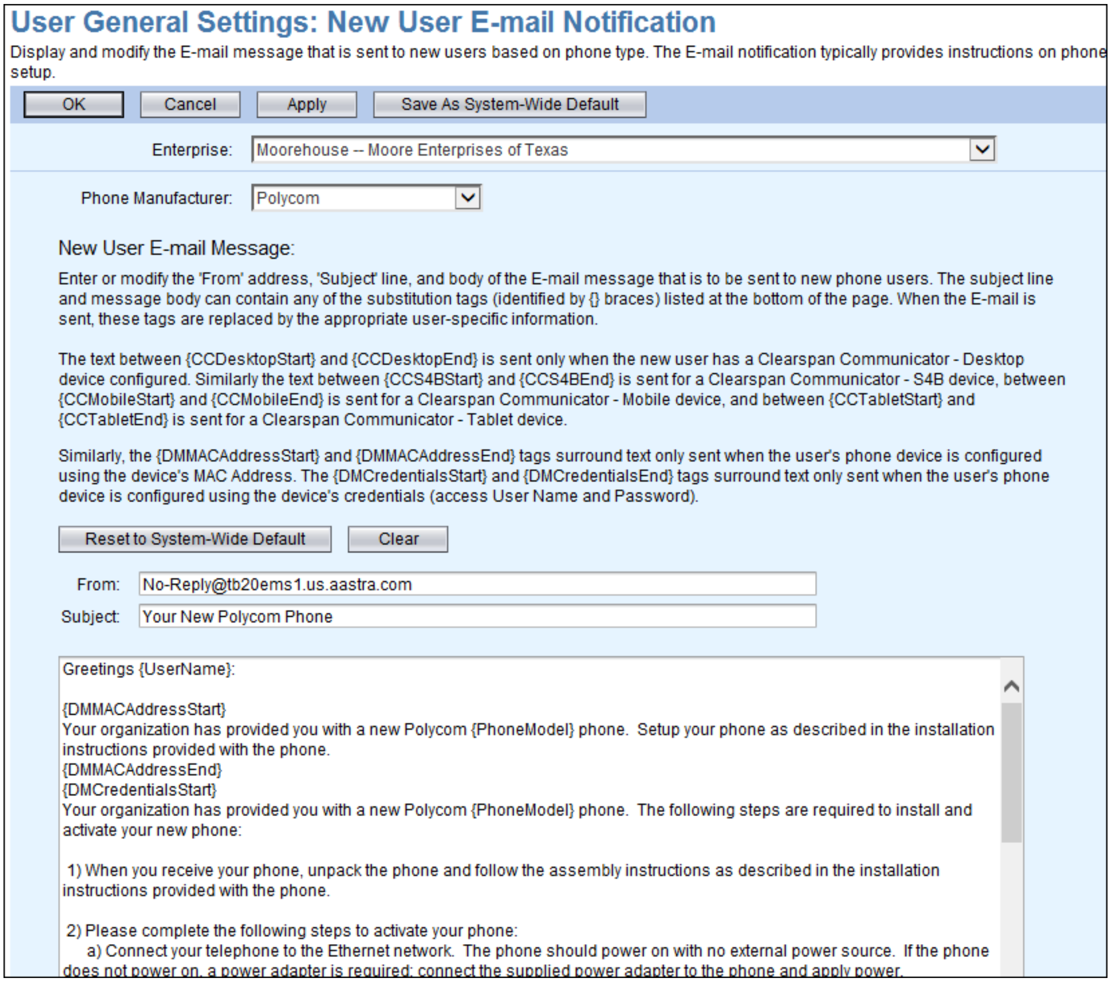


Figure 140 User General Settings E-mail Notification for Polycom Phones

PHONE MANAGEMENT FOR POLYCOM PHONES

As with Mitel (Aastra) phones, Polycom phones can also be added or modified under the Phone Management page of Provisioning. On this page, the User Name and Password fields are optional to allow an administrator to create incompletely-defined phones that are to be completed at a later date.

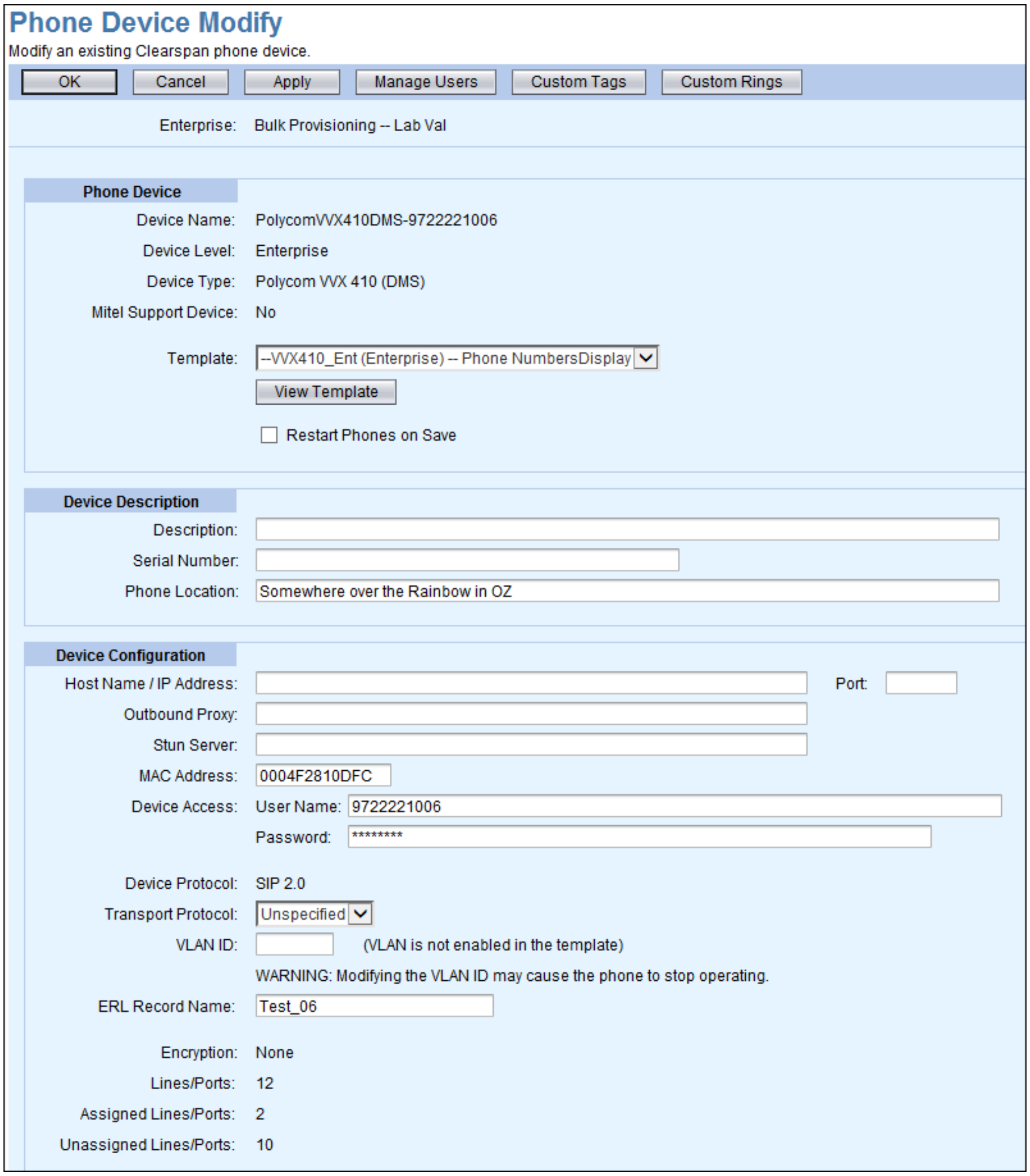


Figure 141 Phone Device Modify for Polycom Phones

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.
- 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 (Aastra) 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.

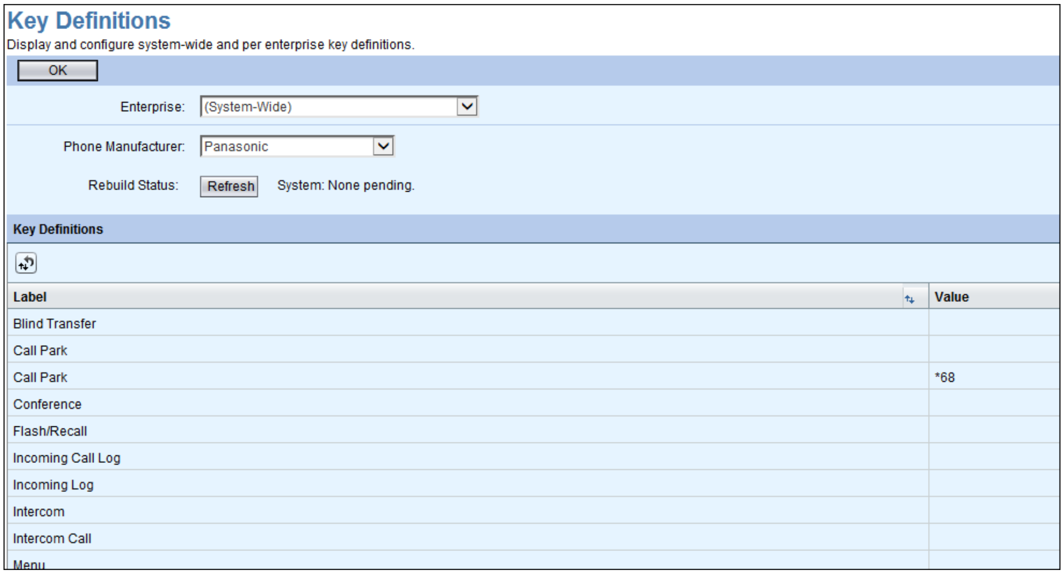


Figure 142 Key Definitions for Panasonic Phones

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, and then select **Global Settings**. The extra settings must exist for the Panasonic phones and are in an XML format, as are all Panasonic phone settings. Click **Dial Plan** to enter dial plan information for System, Enterprise, or Group levels. The dial plan information entered must be in Panasonic format and can include any Panasonic-specific setting.

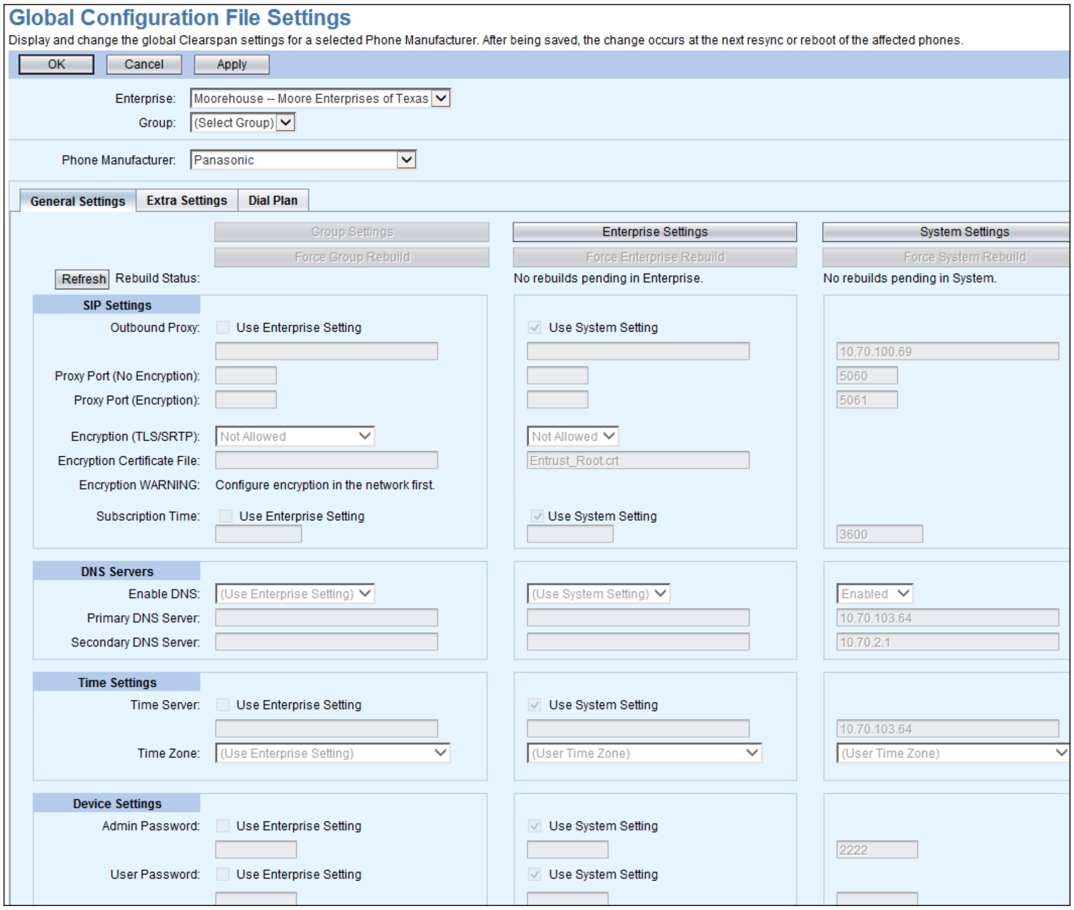
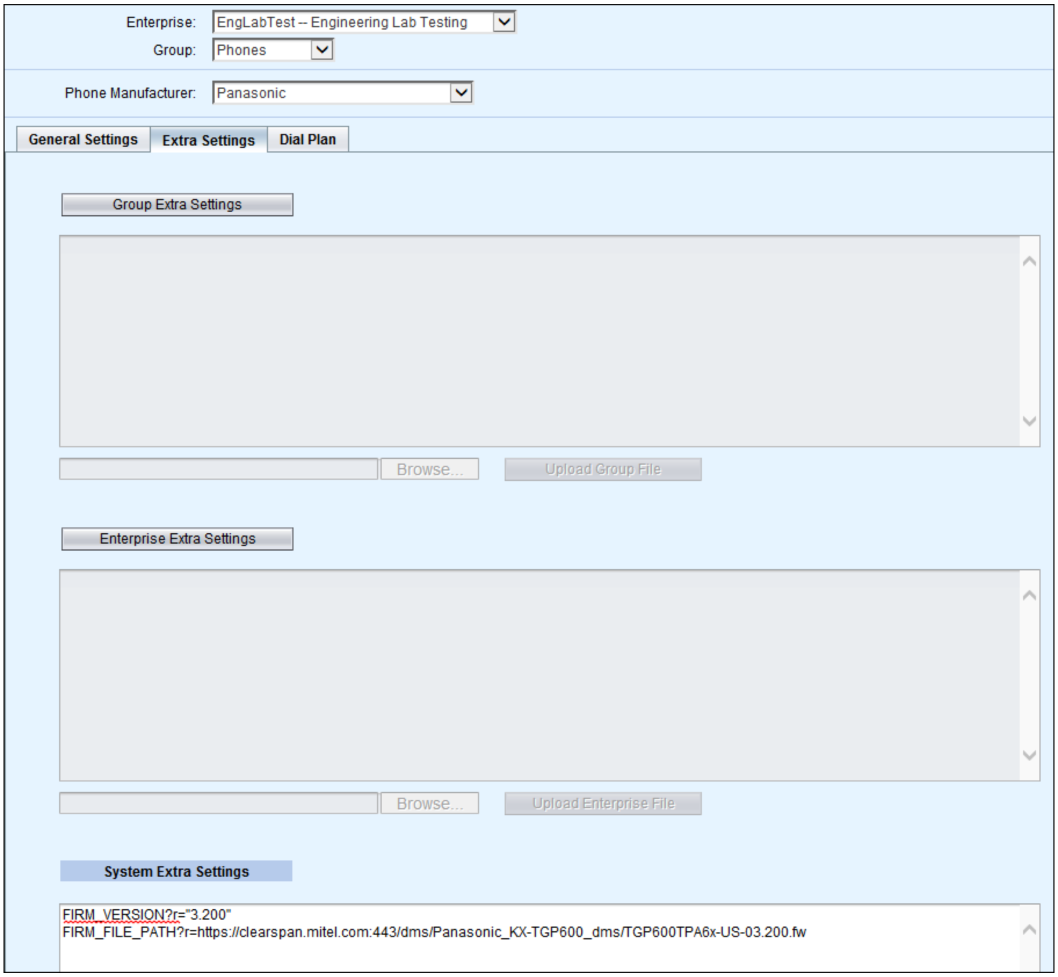


Figure 143 Global Settings for Panasonic Phones



Note: For integration with Clearspan, Panasonic phone firmware must be version 3.2 or later.

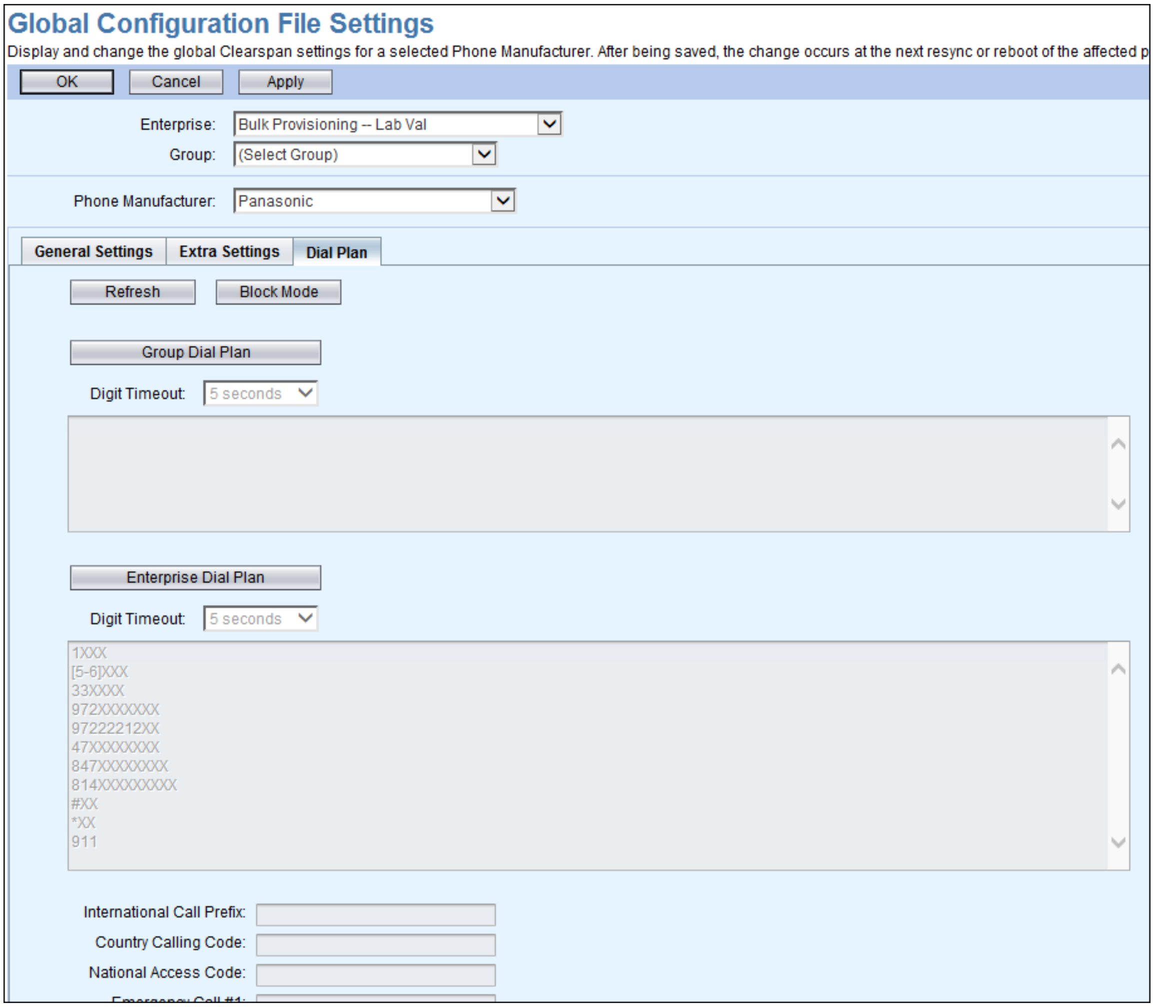


Figure 144 Global Settings – Dial Plans Tab for Panasonic Phones

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.
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.

FIELD	SETTING
Encryption (TLS/SRTP)	Select the setting for encryption.
Encryption Certificate File	Name for 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 Codecs	
Voice Codec #1 to #5	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: • 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.

FIELD	SETTING
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 port number defaults to 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

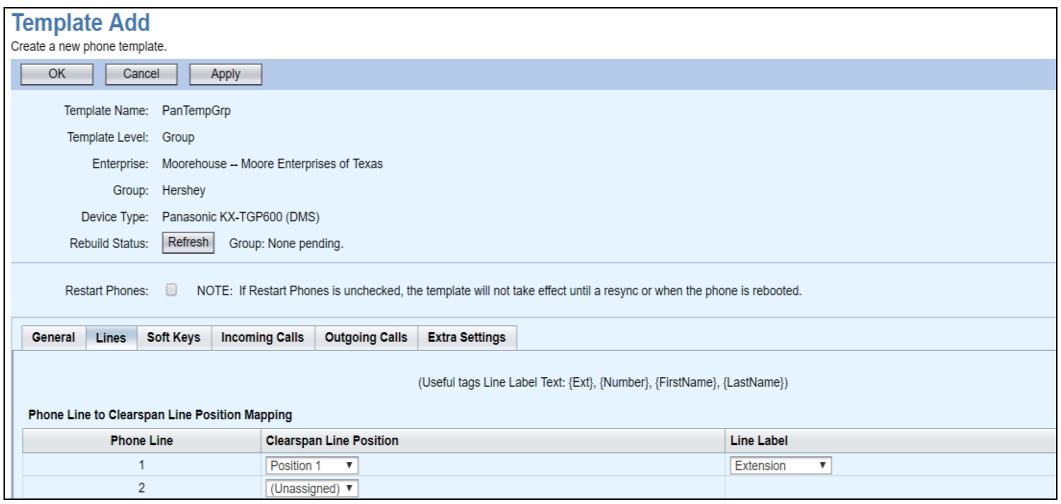
As with Mitel (Aastra) phones, Panasonic phones can only be created using a phone template. Create templates for the Panasonic phone as described in the *Phone Templates* section, with the differences described in the following table and shown in the following figures.

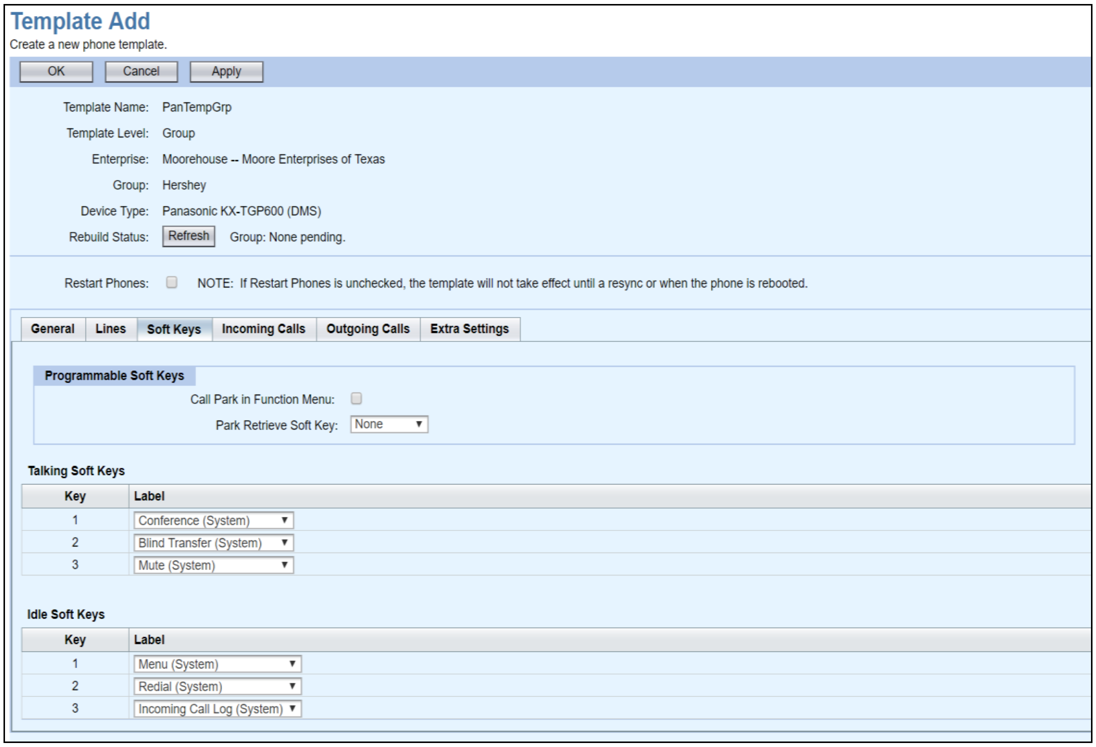
TAB / SECTION	FIELD	SETTING
General		
General Settings	Time Zone	Select the **Time Zone** from the drop-down list. **Use Global Settings** uses the time zone from Global Settings in Phone Templates. **User Time Zone** uses the time zone of the first primary user assigned to the phone. **Use DHCP** uses 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	Check the “Use VLAN” checkbox 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.
	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 certificate file. Must be entered if Encryption is set to Required.
	Subscription Time	Use Global Settings for subscription time, or uncheck the **Use Global Settings** check box and enter the subscription time in seconds
Panasonic Settings	Voice Quality Monitoring	Check 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.
	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

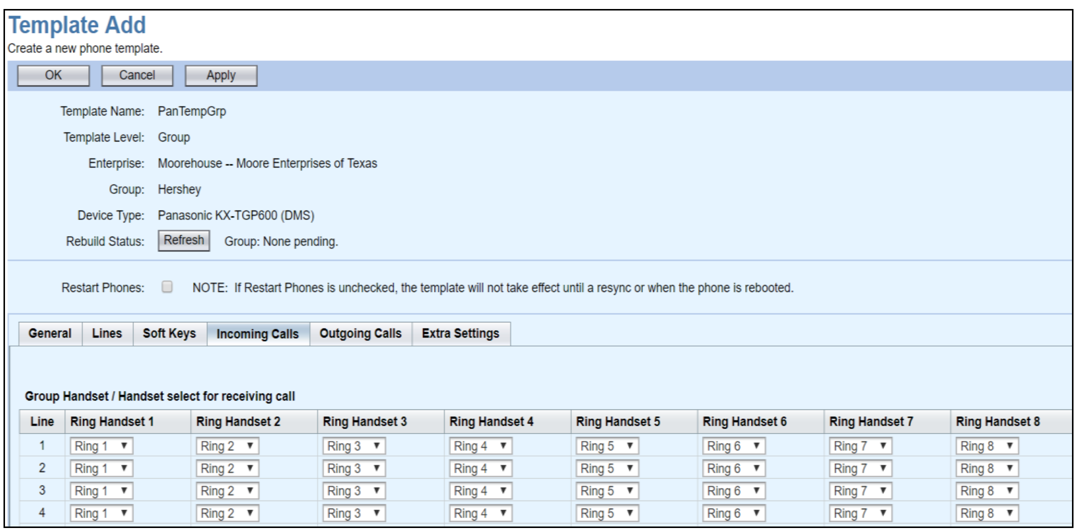
TAB / SECTION	FIELD	SETTING
		tag {Ext}, or phone number, represented by the tag {Number}. To display a name, set the Text label to "{First Name} {Last Name}" or "{Last Name}, {First Name}". When a single number is used for all handsets, the handset name display for all handsets comes from the Line Label 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	Key	Displays the position of a specific soft key within the soft keys displayed on the phone.
	Label	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 • Menu • Outgoing Call Log • Incoming 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". Soft keys defined are used for all handsets on line configured.
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 doesn't ring and doesn't accept incoming calls on that line.
Outgoing Calls		
	Handset	Displays the number of the handset.

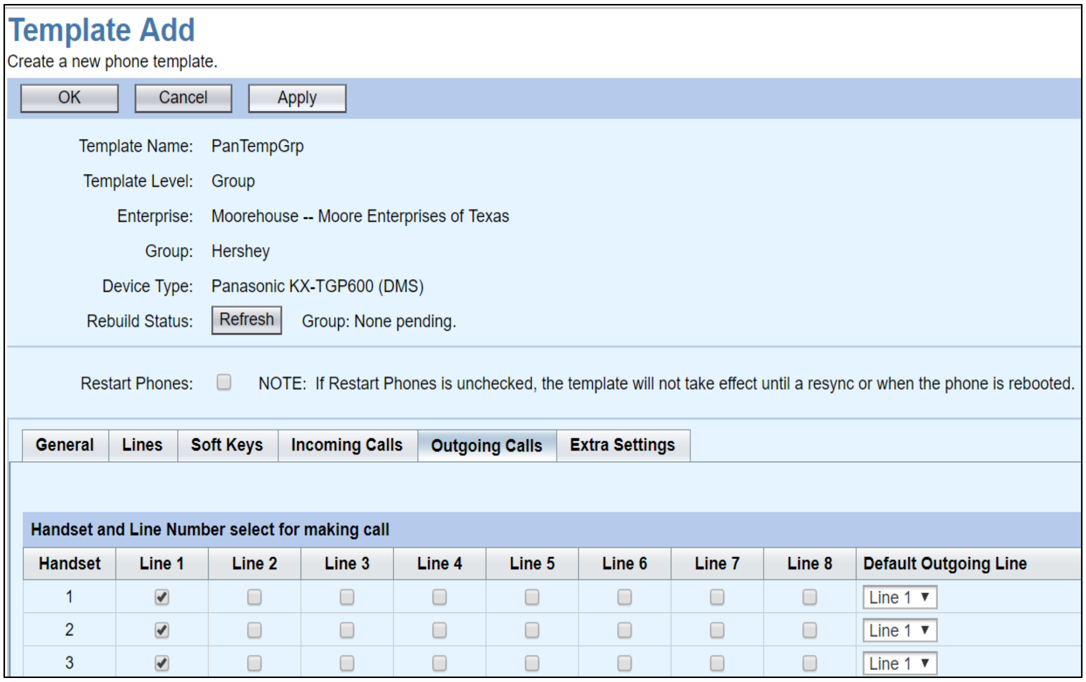
TAB / SECTION	FIELD	SETTING
	Line 1-8	Check the boxes to configure which lines can be used to make calls. By default, all lines are checked.
	Default Outgoing Line	Specifies line used to make calls.
Extra Settings		
	Extra Settings	Enter extra settings that are to be applied to all Panasonic phones using this template. The extra settings must exist for the Panasonic phone and are in an XML format, as are all Panasonic phone settings.

Example Template – Single Line

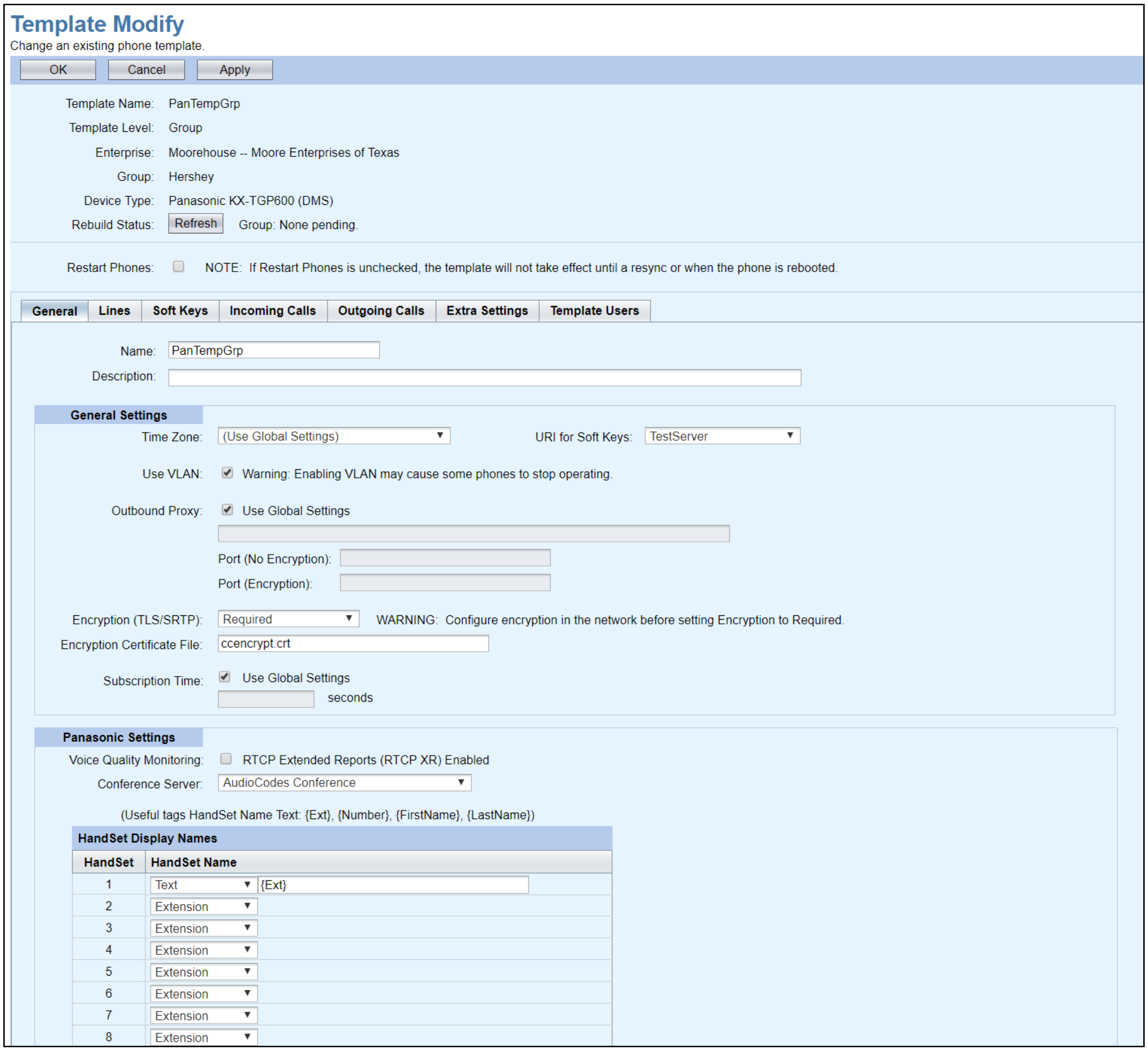


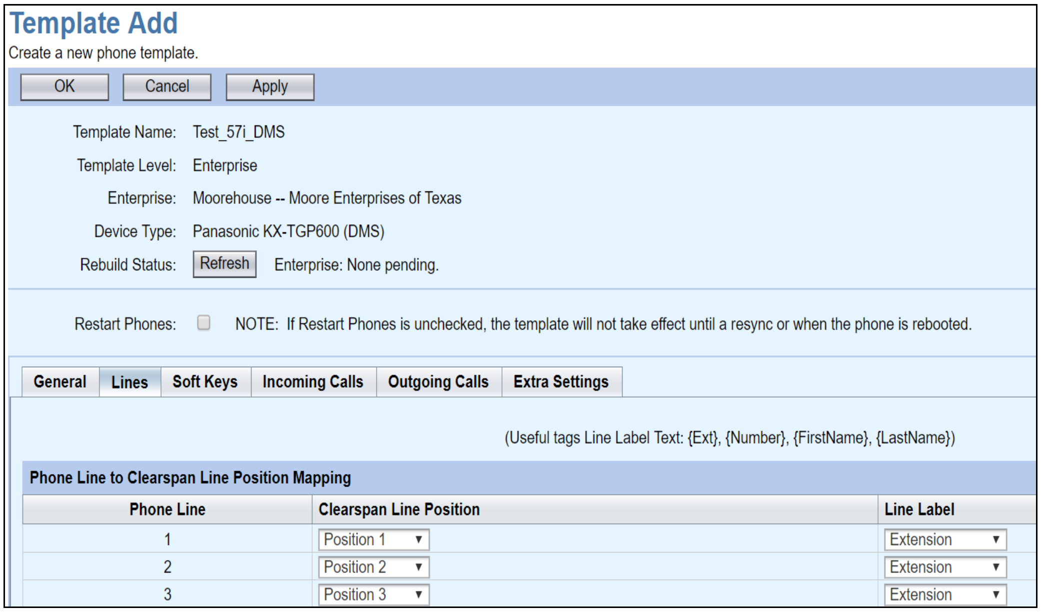

Template Add
Create a new phone template.
OK
Cancel
Apply
Template Name: PanTempGrp
Template Level: Group
Enterprise: Moorehouse -- Moore Enterprises of Texas
Group: Hershey
Device Type: Panasonic KX-TGP600 (DMS)
Rebuild Status: Refresh Group: None pending.
Restart Phones: NOTE: If Restart Phones is 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
Programmable Soft Keys
Call Park in Function Menu:
Park Retrieve Soft Key: None
Talking Soft Keys
Key
Label
1 Conference (System)
2 Blind Transfer (System)
3 Mute (System)
Idle Soft Keys
Key
Label
1 Menu (System)
2 Redial (System)
3 Incoming Call Log (System)

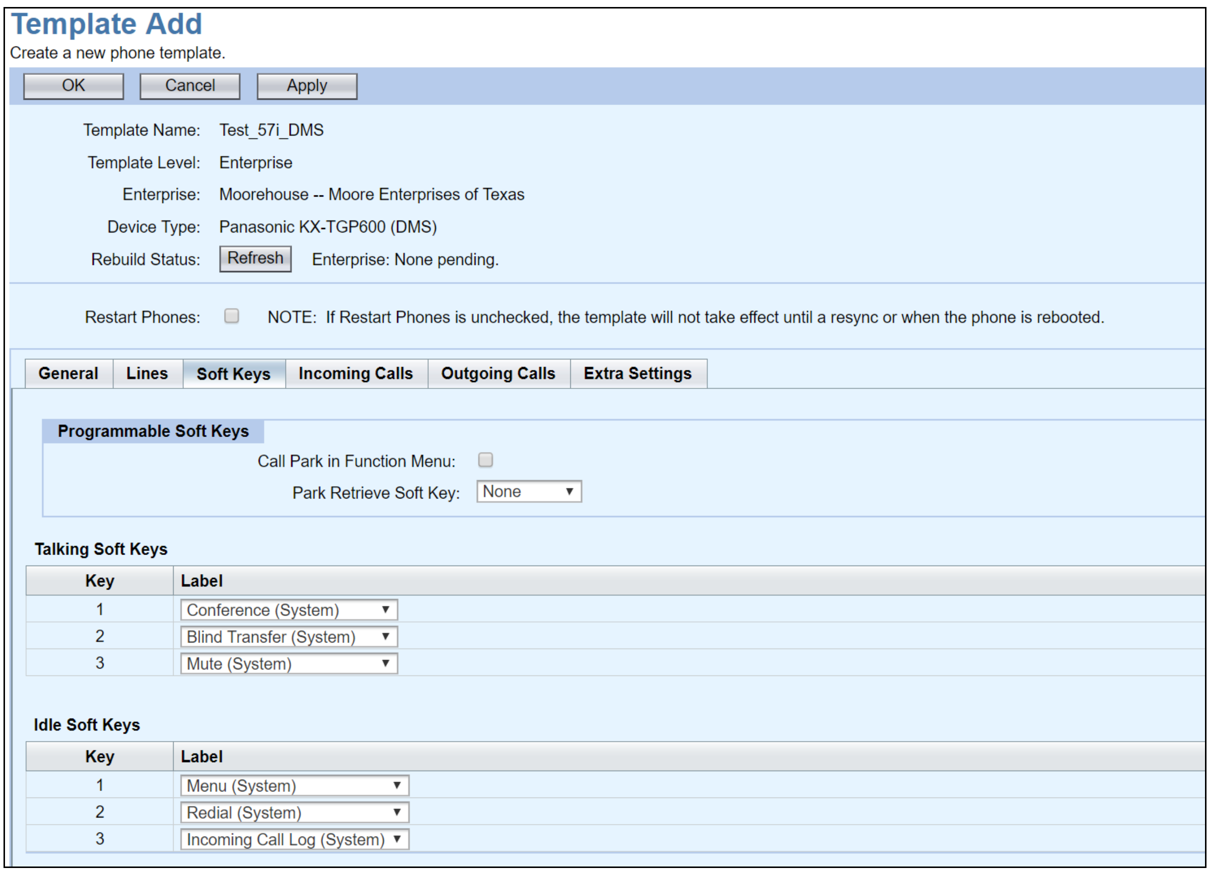

Template Add
Create a new phone template.
OK
Cancel
Apply
Template Name: PanTempGrp
Template Level: Group
Enterprise: Moorehouse -- Moore Enterprises of Texas
Group: Hershey
Device Type: Panasonic KX-TGP600 (DMS)
Rebuild Status: Refresh Group: None pending.
Restart Phones: NOTE: If Restart Phones is 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
Group Handset / Handset select for receiving call
Line
Ring Handset 1
Ring Handset 2
Ring Handset 3
Ring Handset 4
Ring Handset 5
Ring Handset 6
Ring Handset 7
Ring Handset 8
1 Ring 1 Ring 2 Ring 3 Ring 4 Ring 5 Ring 6 Ring 7 Ring 8
2 Ring 1 Ring 2 Ring 3 Ring 4 Ring 5 Ring 6 Ring 7 Ring 8
3 Ring 1 Ring 2 Ring 3 Ring 4 Ring 5 Ring 6 Ring 7 Ring 8
4 Ring 1 Ring 2 Ring 3 Ring 4 Ring 5 Ring 6 Ring 7 Ring 8

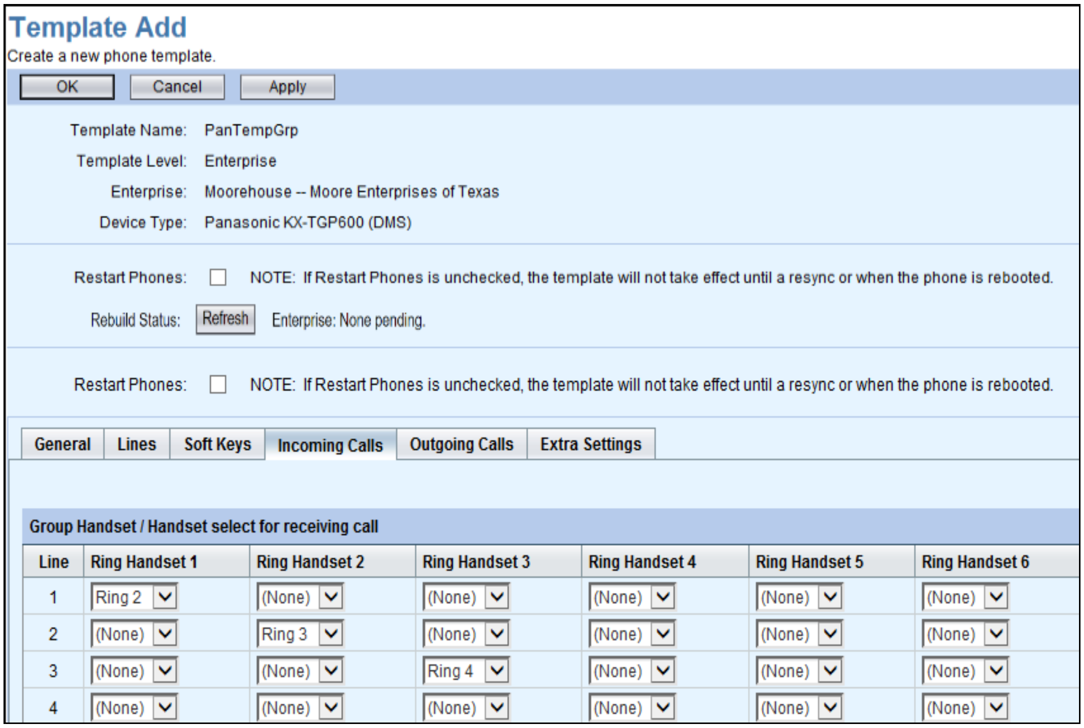

Template Add
Create a new phone template.
OK
Cancel
Apply
Template Name: PanTempGrp
Template Level: Group
Enterprise: Moorehouse -- Moore Enterprises of Texas
Group: Hershey
Device Type: Panasonic KX-TGP600 (DMS)
Rebuild Status: Refresh Group: None pending.
Restart Phones: NOTE: If Restart Phones is 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
Handset and Line Number select for making call
Handset
Line 1
Line 2
Line 3
Line 4
Line 5
Line 6
Line 7
Line 8
Default Outgoing Line
1
2
3
Line 1
Line 1
Line 1

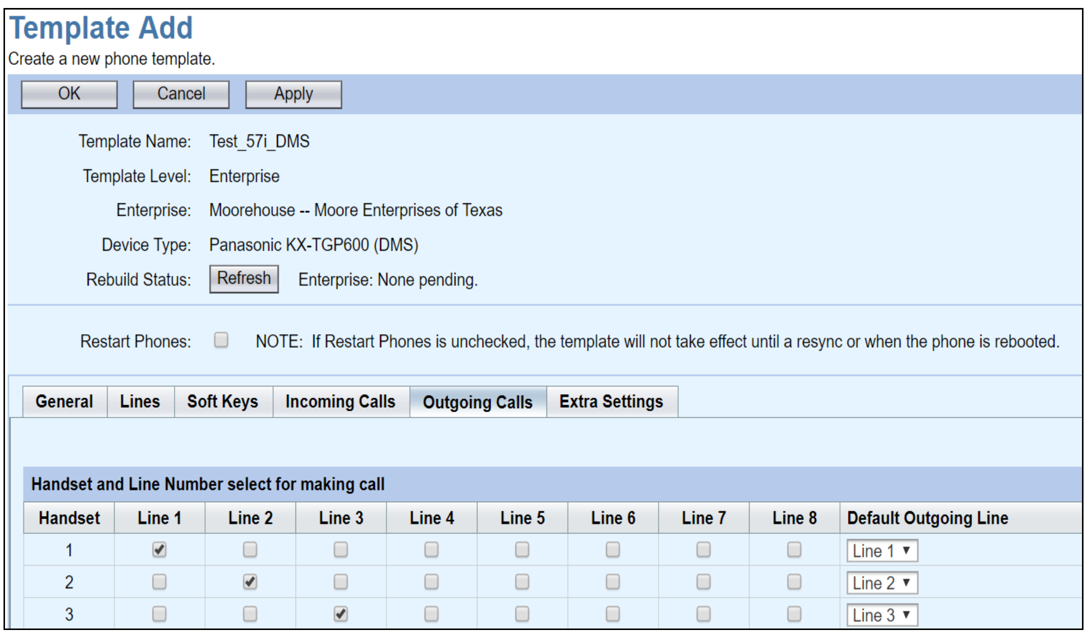
Example Template – Multiple Lines

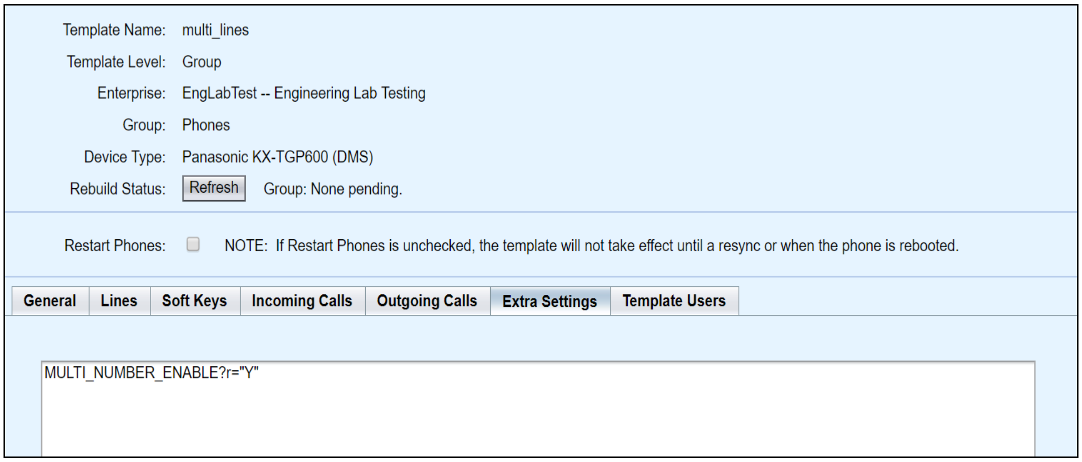



Template Add
Create a new phone template.
OK
Cancel
Apply
Template Name: Test_57i_DMS
Template Level: Enterprise
Enterprise: Moorehouse -- Moore Enterprises of Texas
Device Type: Panasonic KX-TGP600 (DMS)
Rebuild Status: Refresh Enterprise: None pending.
Restart Phones: NOTE: If Restart Phones is unchecked, 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
(Useful tags Line Label Text: {Ext}, {Number}, {FirstName}, {LastName})
Phone Line to Clearspan Line Position Mapping
Phone Line
Clearspan Line Position
Line Label
1 Position 1 Extension
2 Position 2 Extension
3 Position 3 Extension


Template Add
Create a new phone template.
OK
Cancel
Apply
Template Name: Test_57i_DMS
Template Level: Enterprise
Enterprise: Moorehouse -- Moore Enterprises of Texas
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
Programmable Soft Keys
Call Park in Function Menu:
Park Retrieve Soft Key: None
Talking Soft Keys
Key
Label
1 Conference (System)
2 Blind Transfer (System)
3 Mute (System)
Idle Soft Keys
Key
Label
1 Menu (System)
2 Redial (System)
3 Incoming Call Log (System)


Template Add
Create a new phone template.
OK
Cancel
Apply
Template Name: PanTempGrp
Template Level: Enterprise
Enterprise: Moorehouse -- Moore Enterprises of Texas
Device Type: Panasonic KX-TGP600 (DMS)
Restart Phones:
NOTE: If Restart Phones is unchecked, the template will not take effect until a resync or when the phone is rebooted.
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
Group Handset / Handset select for receiving call
Line
Ring Handset 1
Ring Handset 2
Ring Handset 3
Ring Handset 4
Ring Handset 5
Ring Handset 6
1 Ring 2 (None) (None) (None) (None) (None)
2 (None) Ring 3 (None) (None) (None) (None)
3 (None) (None) Ring 4 (None) (None) (None)
4 (None) (None) (None) (None) (None) (None)


Template Add
Create a new phone template.
OK
Cancel
Apply
Template Name: Test_57i_DMS
Template Level: Enterprise
Enterprise: Moorehouse -- Moore Enterprises of Texas
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
Handset and Line Number select for making call
Handset
Line 1
Line 2
Line 3
Line 4
Line 5
Line 6
Line 7
Line 8
Default Outgoing Line
1 Line 1
2 Line 2
3 Line 3



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.

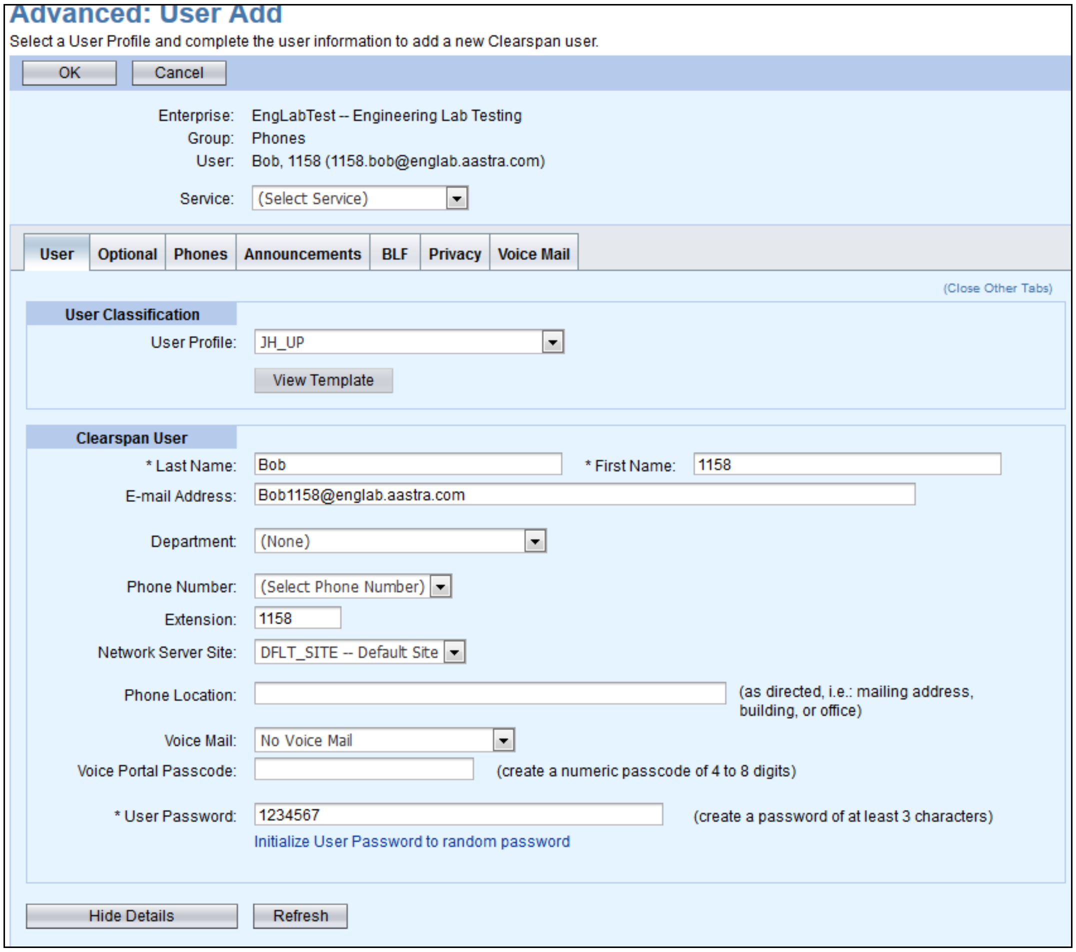
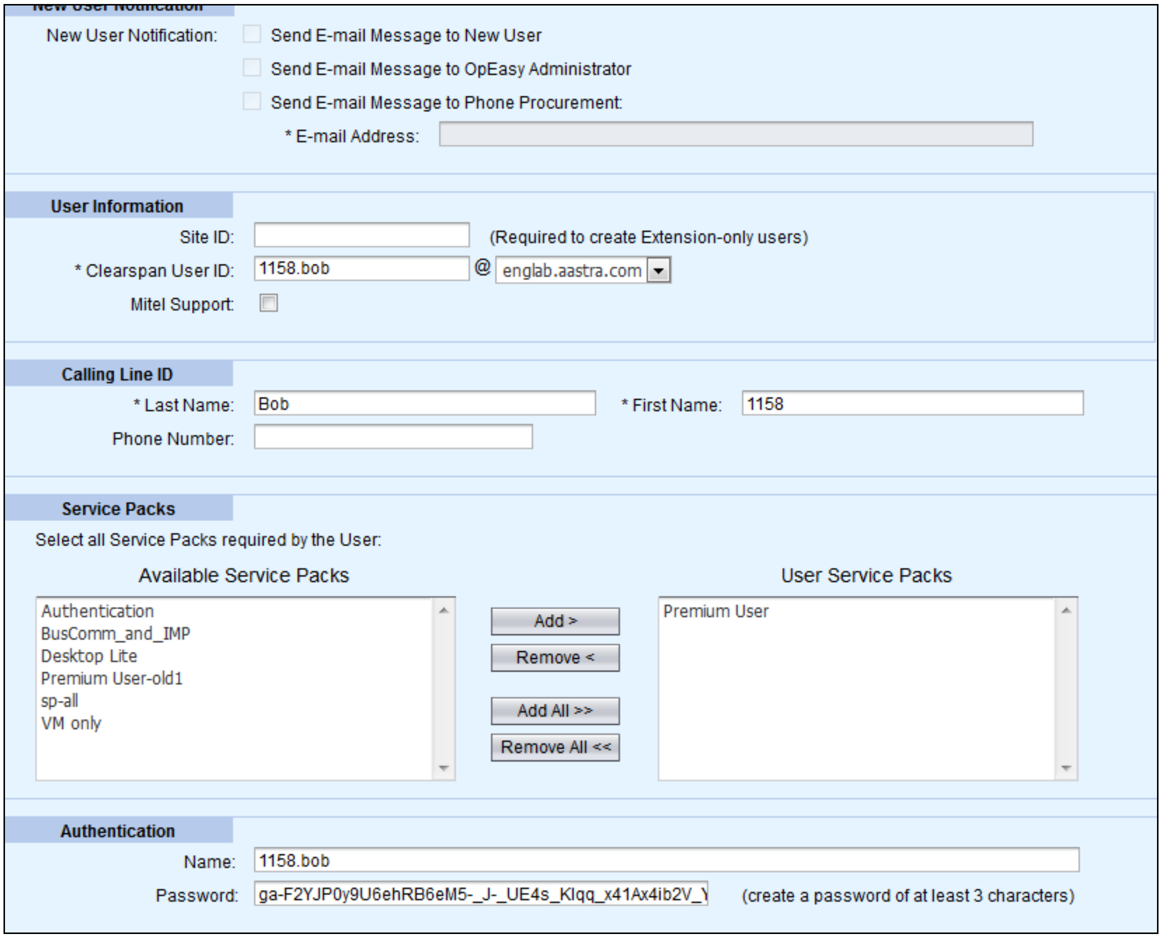


Figure 137 Advanced User Add for Panasonic Phones (Top)



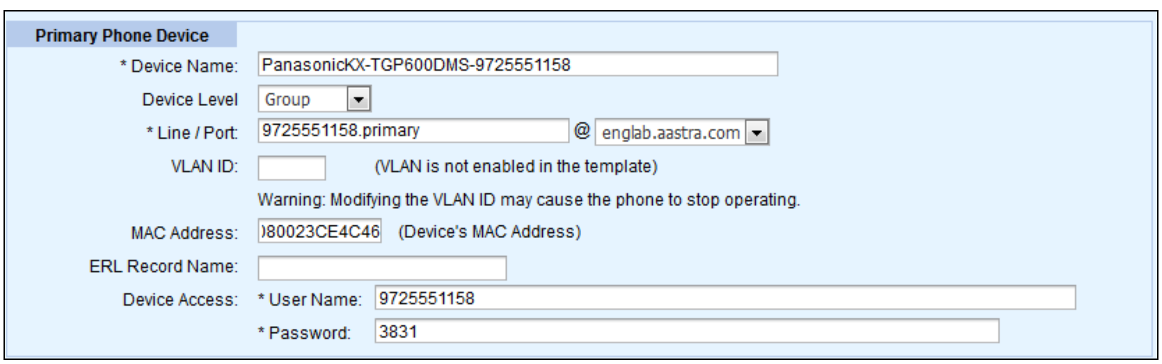


Figure 138 Advanced User Add for Panasonic Phones (Bottom)

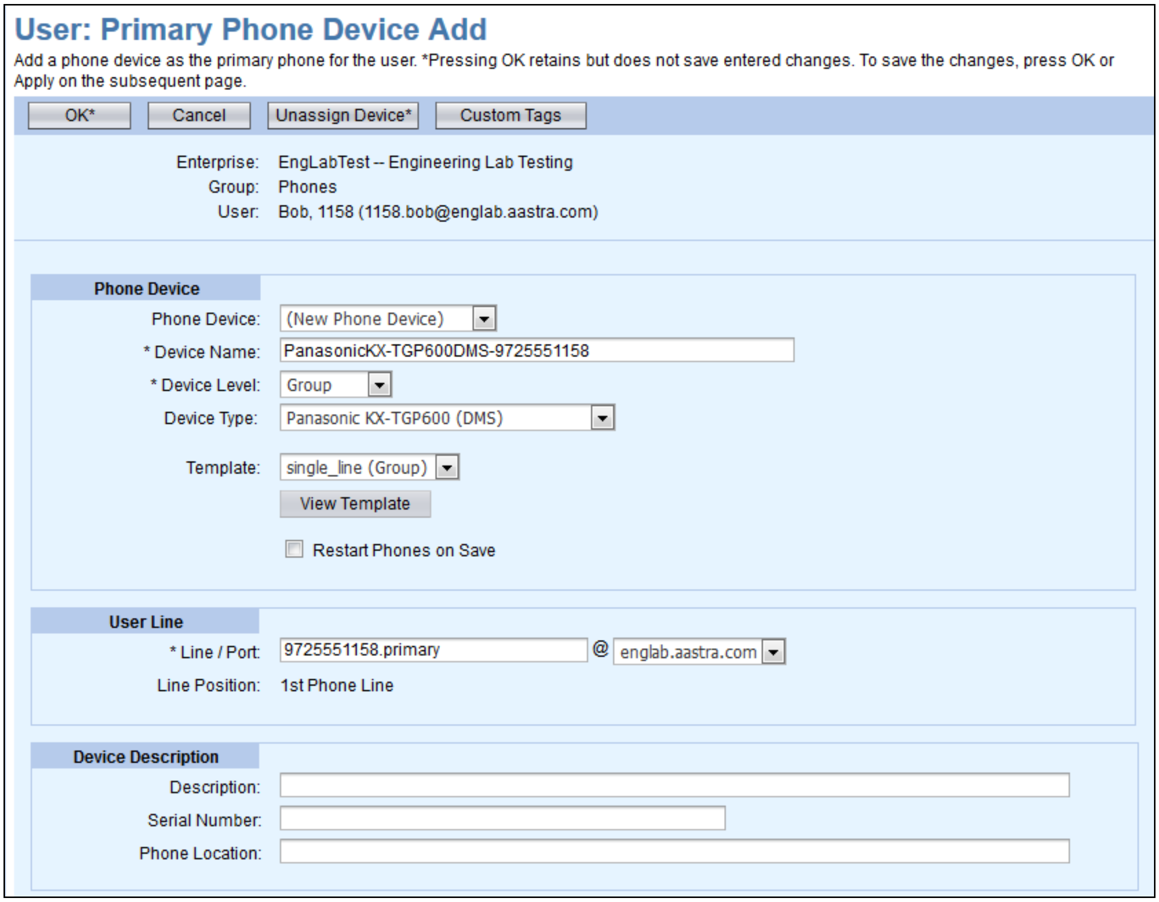


Figure 139 User Primary Phone Device Settings for Panasonic Phones

User General Settings for Panasonic Phones

As with Mitel (Aastra) 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. Change the new user E-mail message as you would for a Mitel phone, with the text appropriate for a Panasonic phone.

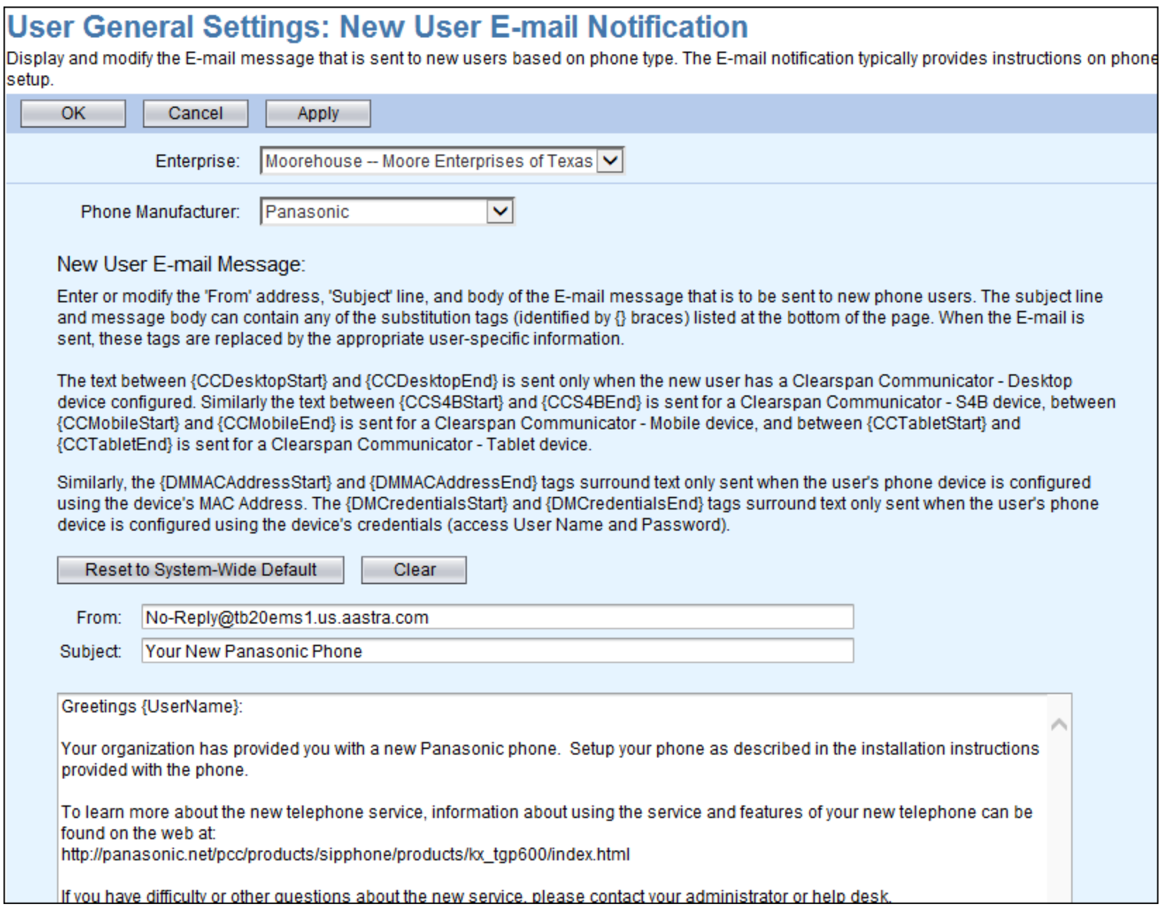


Figure 145 User General Settings E-mail Notification for Panasonic Phones

PHONE MANAGEMENT FOR PANASONIC PHONES

As with Mitel (Aastra) phones, Panasonic phones can also be added or modified under the Phone Management page of Provisioning. On this page, the User Name and Password fields are optional to allow an administrator to create incompletely-defined phones that are to be completed at a later date. Also includes phone custom tags “HandSet Name” and “HandSet Password”, both are set per base station and used across all handsets for all lines used by the base station.

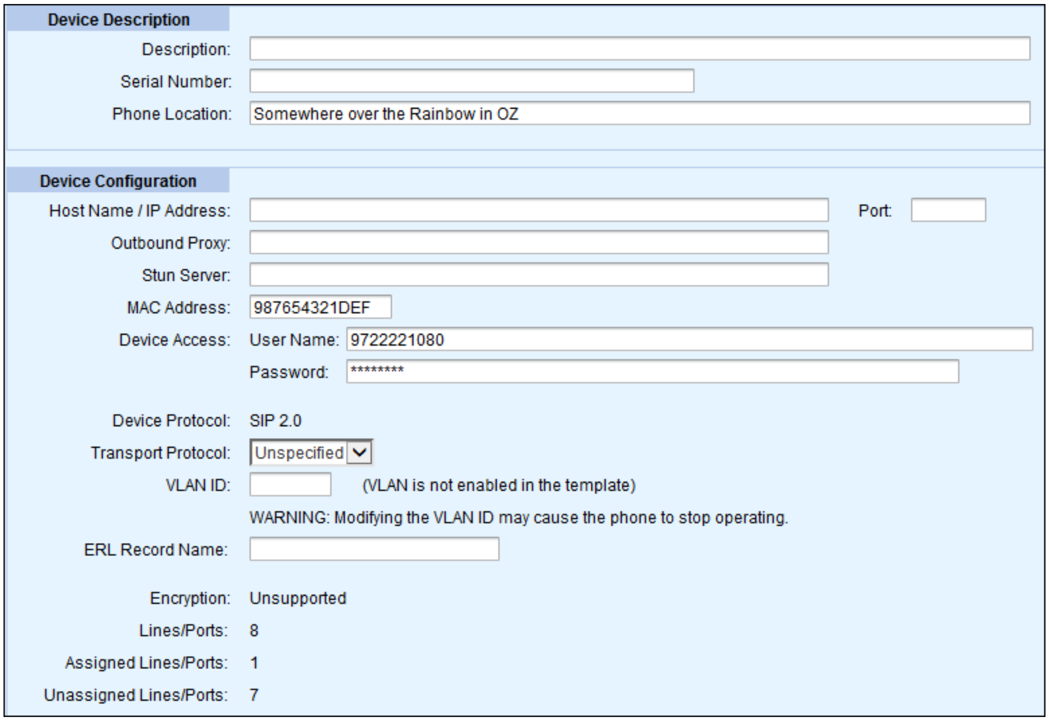


Figure 146 Phone Device Page for Panasonic Phones

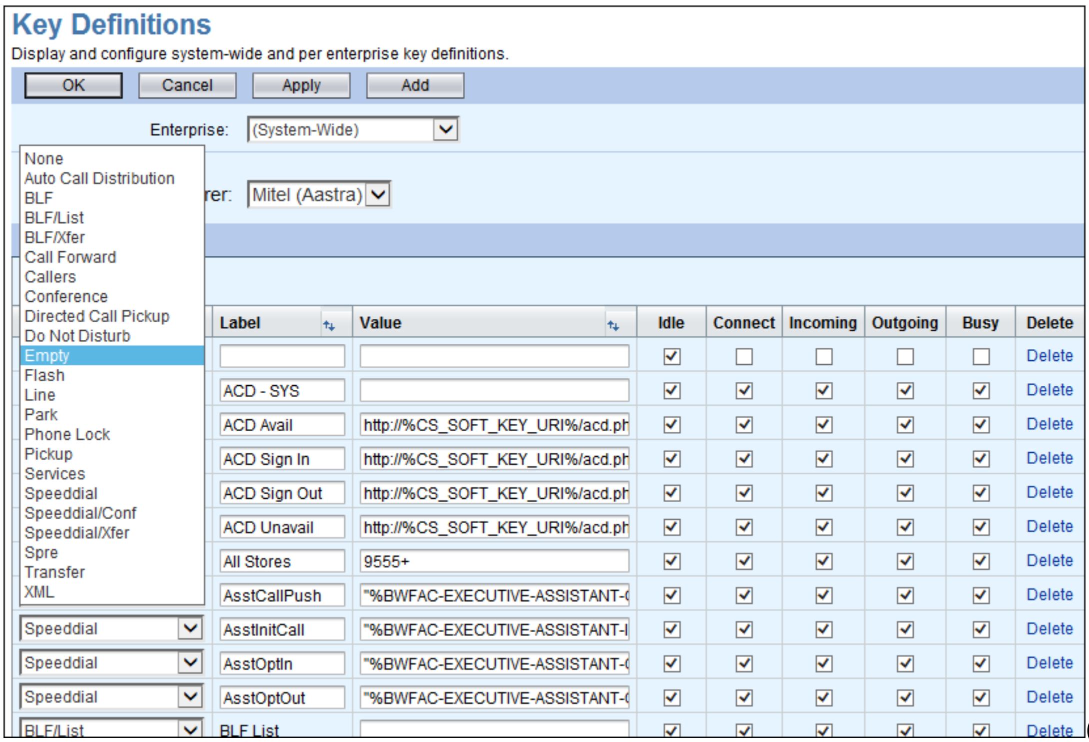
INSTALLING PANASONIC PHONES

For information about installing Panasonic phones, refer to the *Device Management Configuration Guide*.

APPENDIX C: 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.

Note: Only SR administrators and above are allowed to create or modify 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_SOFT_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 Mitel 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 is desired 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 in order 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 desired. This is provisioned with OpEasy via Provisioning | Group Settings | Phone Directory Management.

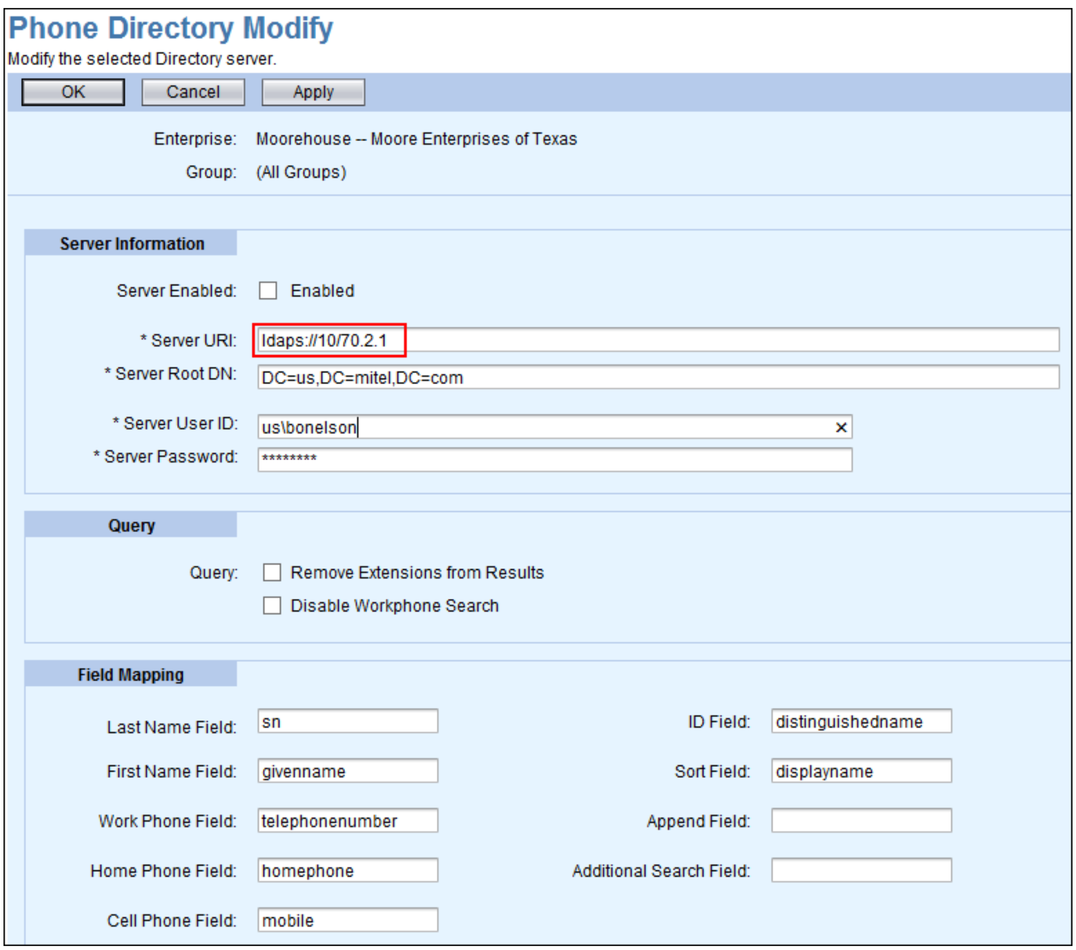
When the directory application is launched (via ad.php), it first identifies which group the device is associated with and connects to the provisioned LDAP server to fulfill the requests.

Secure vs. Non-Secure Access

Note that the URI field for the directory uses the format of **ldap://**<*ldap 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://<***ldap server name*>

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.



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 additional 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 "speedtype" 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 in order 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

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:

1. CNN (News)
2. Weather
3. ESPN (Sports)
4. Movies
5. Today (Today in history, quote of the day, etc.)

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 in order 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 (Aastra) 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 ⇩⇧to view
```

The list of Speed Dial entries may be scrolled through via the navigation keys. The user navigates to the desired 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 e.g. 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:

1. Add (add a new entry)

2. Edit (edit the selected entry)
3. Delete (delete the selected entry)
4. 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:

1. "Enter Speed Code"
2. "Enter Number"
3. "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 D: 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

DIRCT PICKUP

EMPTY

FAVORITES

LINE

PAGING

PARK

PARK RTRV

PICKUP

RECENT

RETRIEVE

SPEED 8/SPEED100

ZIPDIAL/ZIPDIAL2

APPENDIX E: 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.

NOICE 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.