



A MITEL
PRODUCT
GUIDE

Mitel Assistant

Mitel Assistant User Guide

June 2024

Notices

The information contained in this document is believed to be accurate in all respects but is not warranted by **Mitel Networks Corporation (MITEL®)**. The information is subject to change without notice and should not be construed in any way as a commitment by Mitel or any of its affiliates or subsidiaries. Mitel and its affiliates and subsidiaries assume no responsibility for any errors or omissions in this document. Revisions of this document or new editions of it may be issued to incorporate such changes. No part of this document can be reproduced or transmitted in any form or by any means - electronic or mechanical - for any purpose without written permission from Mitel Networks Corporation.

Trademarks

The trademarks, service marks, logos and graphics (collectively "Trademarks") appearing on Mitel's Internet sites or in its publications are registered and unregistered trademarks of Mitel Networks Corporation (MNC), its affiliates, parents, or subsidiaries (collectively "Mitel") or others. Use of the Trademarks is prohibited without the express consent from Mitel. Please contact our legal department at legal@mitel.com for additional information. For a list of the worldwide Mitel Networks Corporation registered trademarks, please refer to the website: <http://www.mitel.com/trademarks>.

®,™ Trademark of Mitel Networks Corporation

© Copyright 2024, Mitel Networks Corporation

All rights reserved

Contents

- 1 Mitel Assistant User Guide..... 1**
 - 1.1 What is Mitel Assistant..... 1
 - 1.2 Pre-requisites..... 1
 - 1.3 Firewall Settings..... 2
 - 1.4 Configurations for Cross Launching MiCollab..... 2
 - 1.5 Limitations..... 3
 - 1.6 Permissions..... 3
 - 1.7 System Requirements..... 4
 - 1.8 Adding Mitel Assistant..... 6
 - 1.9 Using Mitel Assistant..... 8
 - 1.10 Presence Status in Microsoft Teams and Mitel Assistant..... 19
 - 1.11 Removing Mitel Assistant..... 20

Mitel Assistant User Guide

1

This chapter contains the following sections:

- [What is Mitel Assistant](#)
- [Pre-requisites](#)
- [Firewall Settings](#)
- [Configurations for Cross Launching MiCollab](#)
- [Limitations](#)
- [Permissions](#)
- [System Requirements](#)
- [Adding Mitel Assistant](#)
- [Using Mitel Assistant](#)
- [Presence Status in Microsoft Teams and Mitel Assistant](#)
- [Removing Mitel Assistant](#)

Welcome to Mitel Assistant! The following sections describe the pre-requisites and permissions required to use Mitel Assistant, and how to add, use, and remove Mitel Assistant from your Microsoft Teams application.

1.1 What is Mitel Assistant

With Mitel Assistant, the Mitel application integrated with Microsoft Teams, you can [place calls](#) to your contacts in Microsoft Teams and in Microsoft Outlook using any supported Mitel telephony application. The Mitel Assistant application simplifies placing calls with a Mitel call manager using the Mitel desk phone or softphone as the telephony endpoint.

1.2 Pre-requisites

- A Microsoft Teams account.
- A Mitel telephony application. Mitel recommends that you set any supported Mitel telephony application (see [Supported Mitel Telephony Applications](#)) as the default calling app in your device. The option to change the default app for calling is specific to the operating system in which you have deployed the extension. Click the following links for instructions on changing the default calling app specific to your operating system.
 - [Windows](#)
 - [Mac OS](#)
 - [Mobile \(Android and iOS\)](#)
- Configure cross-launch settings
 - If the default calling app of your device is Mitel One, you must configure certain settings (including configuration of Tel-URI) in your device's OS and the browser to be able to cross-launch Mitel One

and place the call. For more information, see the **Pre-requisites** section in [Click to Dial Using Mitel One Web Application](#).

- When a MiCollab (PC, Mac, or Android client) is installed, it will register itself as the default handler for Tel-URI if no other application is selected. If any other application is already selected, then you must configure Tel-URI manually. For more information, see the [Configurations for Cross Launching MiCollab](#) section.

1.3 Firewall Settings

For information about the performance profile and network requirement prerequisites, see the following sections in the CloudLink Gateway User Guide.

- [Configuration Prerequisites](#)
- [Network View](#)
- [Mitel Assistant](#)

1.4 Configurations for Cross Launching MiCollab

If any other application is already selected, then you must configure Tel-URI manually.

Windows

Perform the following steps to configure Tel-URI manually for MiCollab PC Client:

1. From the **System Settings**, choose **Default Apps**.
2. Under **Default Apps**, select the option, **Choose default apps by protocol**.
3. From the list of default apps, click the **Choose a default** option to select the desired application.
4. Select **MiCollab**. The Tel-URI protocol is configured.

Mac

For information about Tel-URI settings in Mac, see Apple manuals.



Note:

On Mac, you can change the default calling app settings on FaceTime.

Android and iOS

For information about Tel-URI settings in Android, see the respective manufacturer documentation. In Android devices, you must clear the default apps if you are unable to view the MiCollab Client while dialing and cross-launching. To clear the default apps from your Android devices, do either of the following:

- **Settings > Apps or App Management > Phone > Set as default > Clear.**
- **Settings > Apps > Default Apps > Opening links > Phone > Clear.**

After you clear the default apps, you will be prompted to choose an application while dialing and cross-launching.

Note:
On iOS, no changes are required in the settings.

On iOS devices the MiCollab Client is cross launched using a custom URI. The custom URI is supported only with MiCollab 9.7.10 or later versions. iOS does not support cross launching of MiCollab Client using Tel-URI.

Note:
While dialing a number from an iOS device without MiCollab installed, the MS Teams native dialer will not be launched.

1.5 Limitations

- The dial pad in Mitel Assistant does not support in-call features. Use a supported Mitel telephony application to use in-call features.
- You can add a maximum of 20 contacts in your Microsoft Teams and Outlook directory as speed dials in Mitel Assistant. When logged in to your CloudLink account, you can add and manage up to 100 contacts as speed dials.

1.6 Permissions

IT Administrator permissions to add Mitel Assistant to your Microsoft Teams

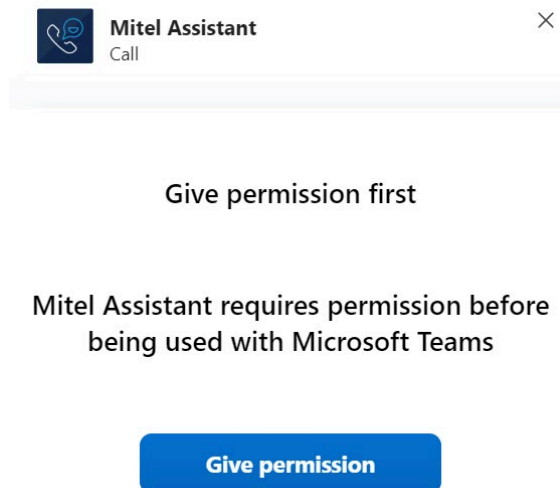
- The IT administrator of your organization can use app permission policies within Microsoft Teams to control what apps are available to Microsoft Teams users in their organization. Therefore, if you are not able to view or add Mitel Assistant to your Microsoft Teams application, contact your IT administrator. For more information, see the Microsoft documentation [Manage app permission policies in Microsoft Teams](#).
- The IT administrator of your organization can use the app setup policies within Microsoft Teams to control how you can customize your Microsoft Teams application. The admin can pre-install apps for your account, control the apps you can install, choose the apps you can pin, and set the order in which

apps appear in your Microsoft Teams application. Therefore, if you are not able to view or add Mitel Assistant to your Microsoft Teams application, contact your IT administrator. For more information, see the Microsoft documentation [Manage app setup policies in Microsoft Teams](#).

End-User permission to use Mitel Assistant with Microsoft Teams

When you open the Mitel Assistant application, a prompt appears requesting your permission to use Mitel Assistant with Microsoft Teams. Do the following to grant permission.

1. From the prompt screen that appears, click **Give permission**.



i Note:

For information about the permissions that the admin must grant to the application for read-write access, see the Mitel Assistant Application > [Permissions Required from the Administrator](#) section in the MS Teams solution guide.

2. In the Microsoft **Sign in** page that opens, enter your credentials in the fields provided, and click **Sign in**.
3. After successful sign in, the page will redirect to the **Call** screen in Mitel Assistant and then close automatically.

1.7 System Requirements

Following are the minimum system requirements for deploying Mitel Assistant.

Supported Operating System (MiCollab Client)

Operating System	Version
Windows	10 or later
Mac	10.14 or later
Android	Android 8 or later
iOS	iOS 9.7.10 or later

Supported Browsers (Mitel Assistant)

Browser	Version
Google Chrome	102.0.5005.115 (64 bit) or later
Microsoft Edge	102.0.1245.41 (64 bit) or later
Mozilla Firefox	101.0 or later

Supported Mitel Telephony Applications

Application	Version
MiCollab Desktop Client	9.6 or later
<div> <div> <i>i</i> Note: MiCollab iOS Client is supported only in Mitel Assistant 1.1.1-14 or later versions. </div> </div>	iOS 9.7.10 or later Android 8 or later
MiCollab PC Client Telephony-only mode	9.6 or later
Mitel One Web	1.13.1 or later
Mitel Dialer	2.2 or later

1.8 Adding Mitel Assistant

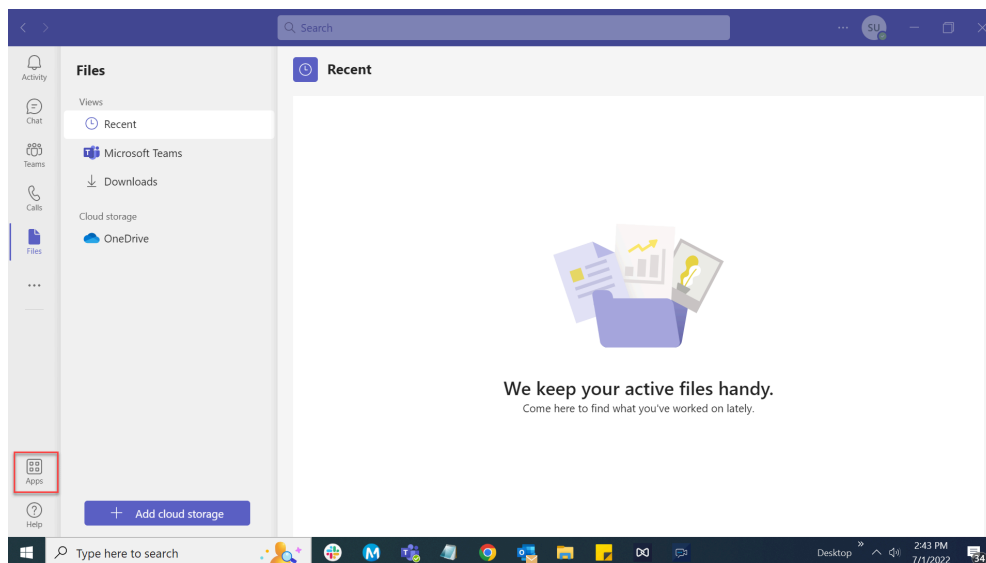
Note:

The Mitel Assistant application added to the MS Teams application from any location can be viewed and used in all locations where MS Teams is accessed. When you use Mitel Assistant from the MS Teams mobile application, you will experience the following:

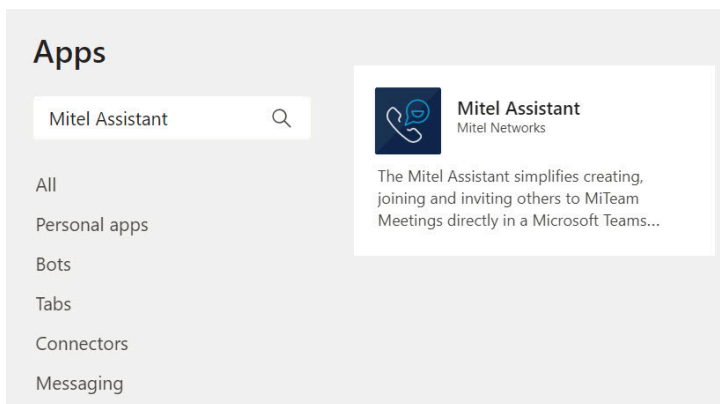
- On Android devices, if a call is initiated from the Mitel Assistant application, you are prompted to select an application if none are selected in the settings. Otherwise, the MS Teams native dialer is launched.
- On iOS devices, if a call is initiated from the Mitel Assistant application, the MiCollab Client is cross launched using custom URI. The custom URI is supported only with MiCollab 9.7.10 or later versions. iOS does not support cross launching of MiCollab Client using Tel-URI. While dialing a number from an iOS device without MiCollab installed, the MS Teams native dialer will not be launched.

After you log in to your Microsoft Teams application, perform the following steps to add Mitel Assistant to the application.

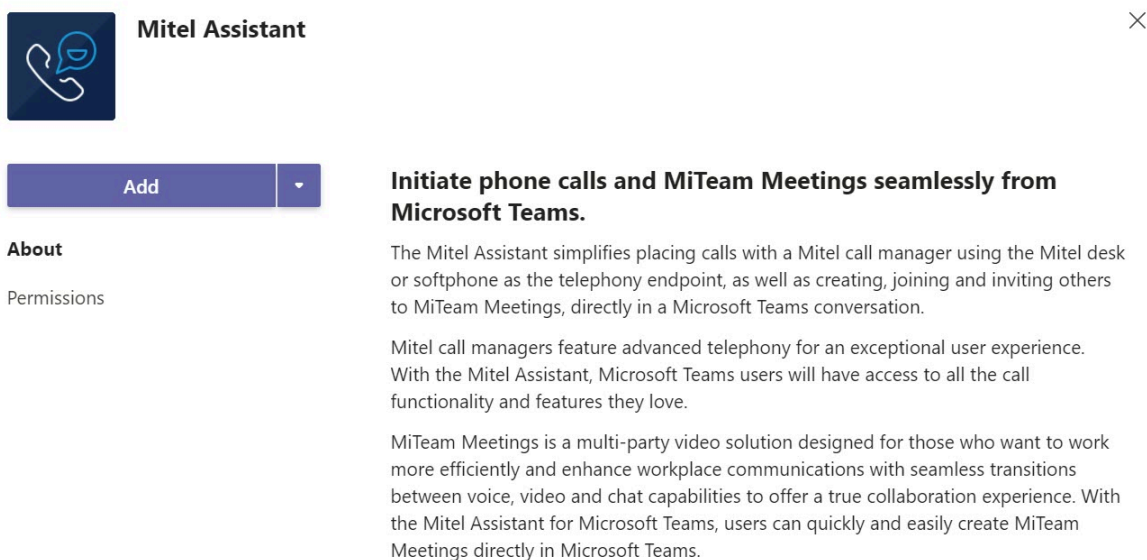
1. Click **Apps** in the lower left corner of your Microsoft Teams application. The **Apps** page within Microsoft Teams opens.

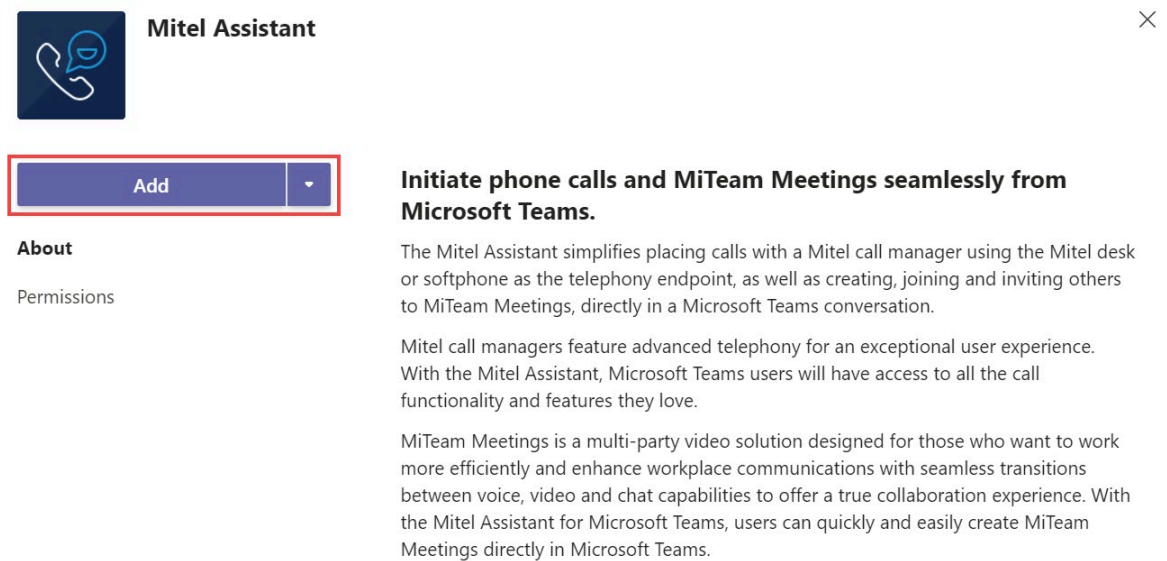


2. Type Mitel Assistant in the Search field.



3. Click **Mitel Assistant** from the results panel. The app information panel opens.



4. Click **Add**.

Mitel Assistant will be added to your Microsoft Teams application, and you will be redirected to the Mitel Assistant **Call** screen.

For easy access, you can pin Mitel Assistant to the sidebar menu. To do this:

1. Click the ******* icon in the sidebar menu. A dialog box opens displaying all the apps you have installed in your Microsoft Teams application.
2. Right-click the **Mitel Assistant** icon and click  **Pin**.

Mitel Assistant will be pinned to the sidebar menu of your MS Teams application.

1.9 Using Mitel Assistant

Note:

- This section describes how to place a call using Mitel Assistant if MiCollab is set as the default calling app of your device. You can use the same steps to place a call if the default calling app of your device is any supported Mitel calling apps.
- If the default calling app of your device is Mitel One Web, you must configure certain settings in your device's OS and the browser to be able to cross-launch Mitel One Web and place the call. For more information, see the **Pre-requisites** section in [Click to Dial Using Mitel One Web Application](#).

Note:

When you return to the Mitel Assistant application from any other tab within MS Teams, then the Mitel Assistant application updates automatically to its latest version.

After you add the Mitel Assistant app to the Microsoft Teams application, you can place a call to a contact during a chat conversation, by searching the directory, using the dial pad, or by using the **Speed Dials** menu.

Note:

If you use one of the following options to place a call, the call will be routed through Mitel PBX:

- **Mitel Assistant add-on**
- **Search**
- **Call History**
- **Speed Dial**
- Phone number link in a contact card in MS Teams

If you use either of the following options to place a call, Mitel Assistant does not route the call through Mitel PBX:

- Call or video icons in MS Teams contact card.
- Call or video icons in chat area.

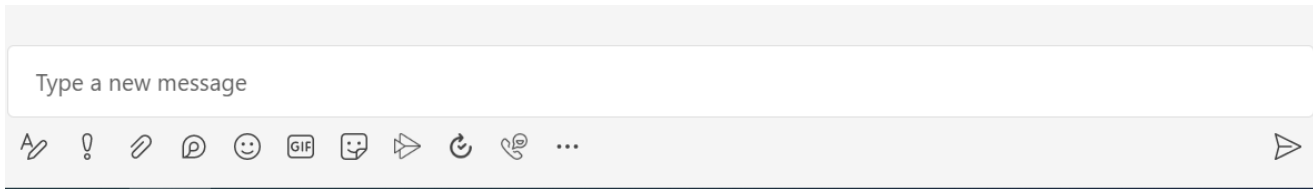
Place a Call during a Chat

During a chat conversation, do the following to place a call to the contact with whom you are chatting:

1. Click the Mitel Assistant icon by doing either of the following:

- **If the Mitel Assistant app is pinned to your chat window**

Click the Mitel Assistant icon at the bottom of the chat window.




- **If the Mitel Assistant app is not pinned to your chat window**

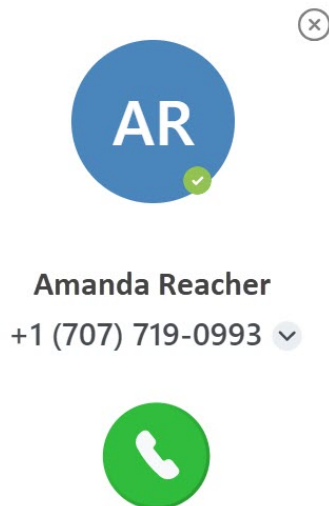
a. Click the **...** icon at the bottom of the chat window.

b.



From the dialog box that opens, click the Mitel Assistant icon ().

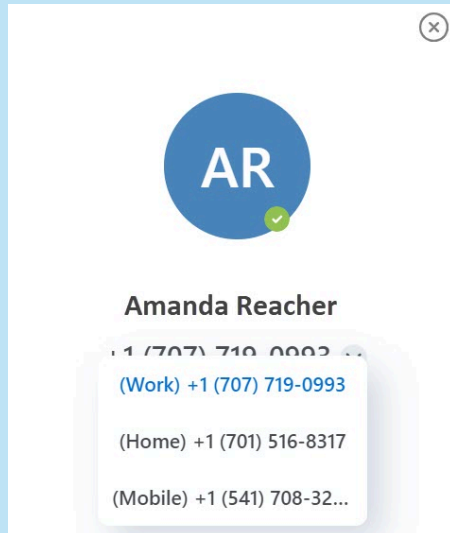
2. From the dialog box that opens, click **Call**. A window opens displaying the name, default number and avatar of the contact.

3. Click the  icon to dial the default number.



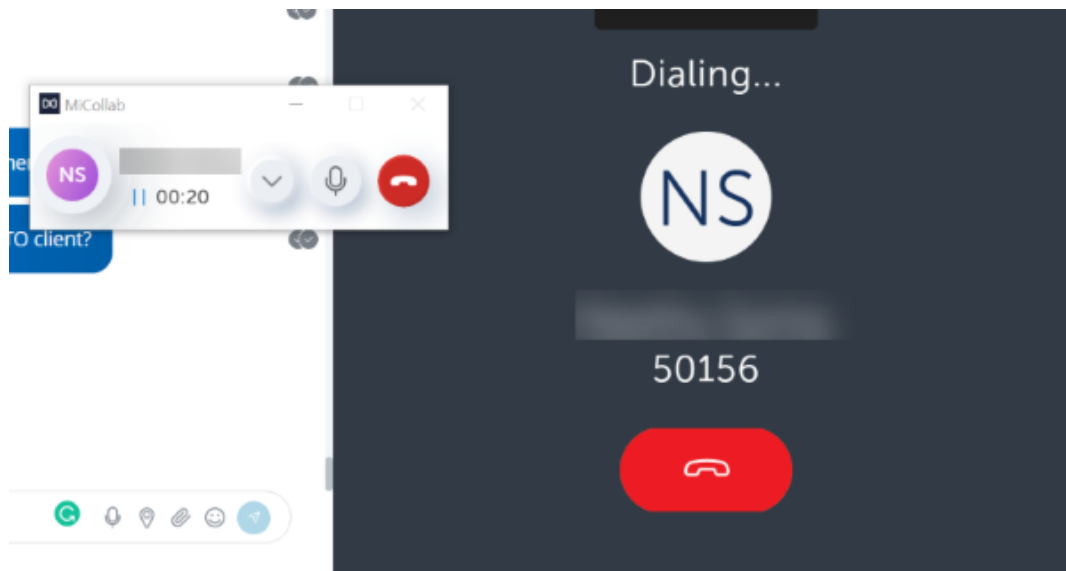
Note:

- If there is more than one telephone number for a contact, click the  icon beside the default number, select the number you want to dial from the drop-down menu, and click the  icon to dial that number.




- The telephone numbers of a contact displayed in the Mitel Assistant directory are synchronized from the **Office phone**, **Home phone**, and **Mobile phone** fields in the Azure Active Directory. These are fixed field mappings and cannot be changed.

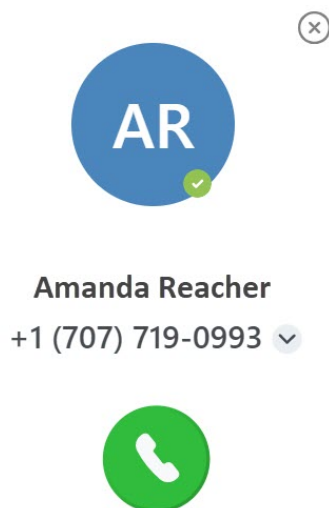
- This will cross-launch the MiCollab application and the call will be placed. An in-call window is displayed with the caller's name, telephone number, and picture (if available).





Place a Call using Search

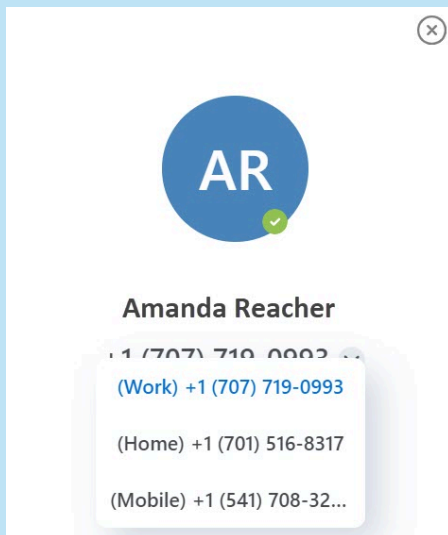
You can place a call to a number, or a contact in the Microsoft Teams or Outlook by searching the contact from the search field in Mitel Assistant. Type the . . Click the name to select that contact whose To do this:

- Select **Mitel Assistant** from the left navigation pane of your Microsoft Teams application. The **Call** page opens.
- Type the name of the contact in the **Search** field. The Search field displays a list of contacts whose names match the letters that you type.
- Click the name to select that contact. A window opens displaying the name, default number, and avatar of the contact. Click the  icon to dial the default number of the contact.



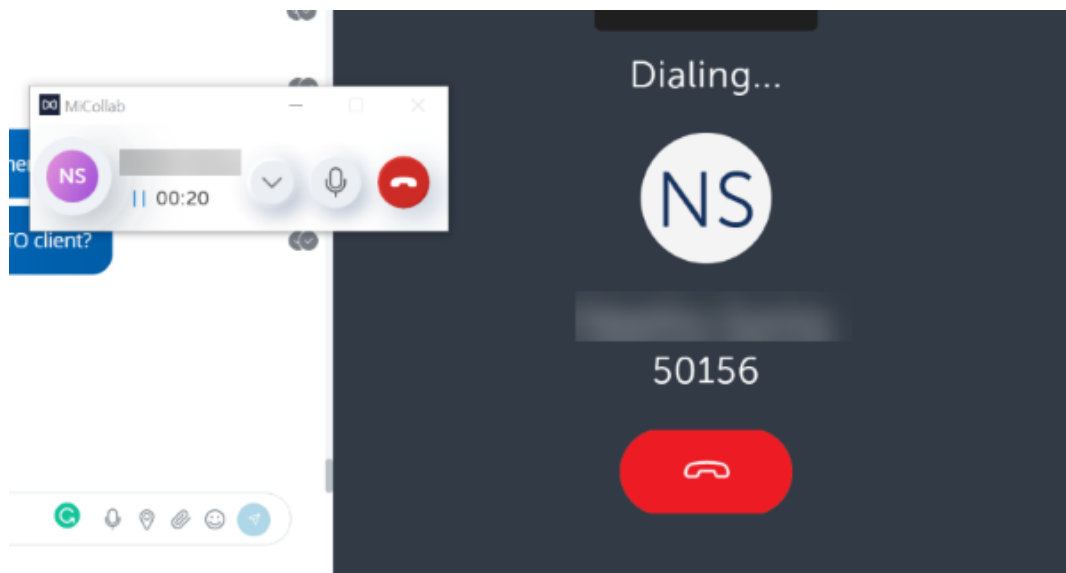
Note:

- If there is more than one telephone number for a contact, click the  icon to beside the default number. Select the number you want to dial from the drop-down menu, and click the  icon to dial that number.



- The telephone numbers of a contact displayed in the Mitel Assistant directory are synchronized from the **Office phone**, **Home phone**, and **Mobile phone** fields in the Azure Active Directory. These are fixed field mappings and cannot be changed.

4. This will cross-launch the MiCollab application and the call will be placed. An in-call window is displayed with the caller's name, telephone number, and picture (if available).

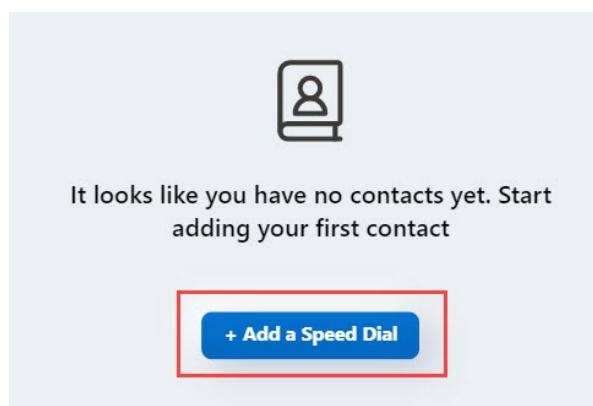


Place a Call using Speed Dial

You can add and manage up to 20 contacts in your Microsoft Teams and Outlook directory as speed dials in Mitel Assistant so that you can call your most common contacts quickly. When logged in to your CloudLink account, you can add and manage up to 100 contacts as speed dials.

To add a contact as a speed dial:

1. Click **Add a Speed Dial**. The **Add Contact** screen opens.




2. In the Search field, type the name of the contact. The Search field displays a list of contacts whose names match the letters that you type. Hover over the name of the contact you want to add, and click **ADD** to add the contact as a speed dial. Clicking **Cancel** cancels the operation.

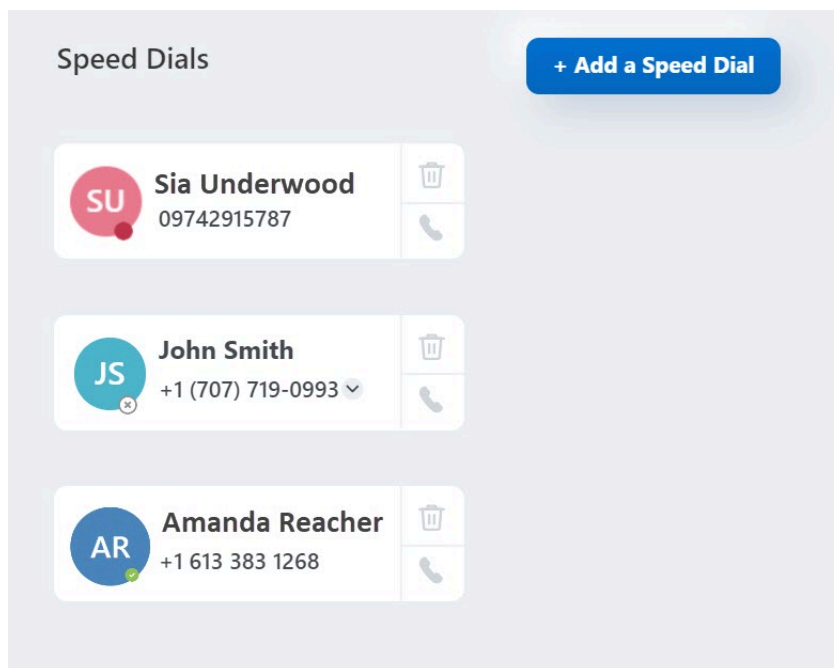


Note:

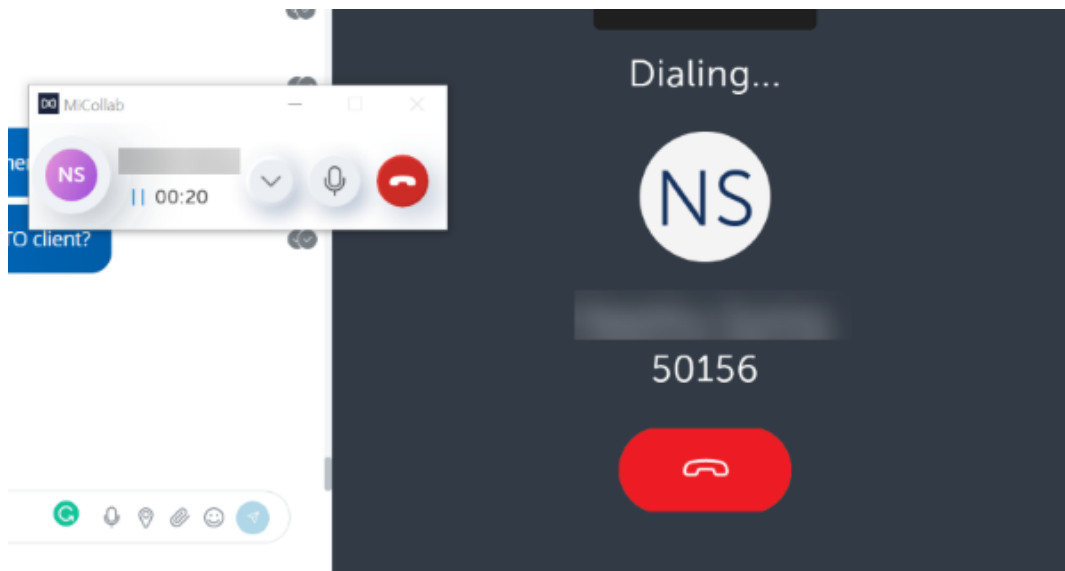
Only contacts with one or more Home, Business or Mobile number fields filled, can be added as Speed Dial's. Contacts without a valid number will display as **NOT AVAILABLE**.

To place a call using speed dial:



1. Click the  icon associated with the contact from the **Speed Dials** menu to dial the primary telephone number for this contact.




2. This will cross-launch the MiCollab application and the call will be placed. An in-call window is displayed with the caller's name, telephone number, and picture (if available).



Note:

The phone numbers of a contact displayed in the speed dial contact list include numbers of the Business Phones, Home Phones, and Mobile Number. If there is more than one telephone number for the contact, click the  icon beside the default number, select the number you want to dial from the drop-down menu, and click the  icon to dial that number. After the call is completed, the selected number will become the default number in the speed dial.

To delete a speed dial:

1. Click the  icon associated with the speed dial you want to delete.
2. In the confirmation panel that opens, click **Delete** to confirm deletion. Clicking **Cancel** cancels the operation.

Delete

Are you sure you want to delete John Smith?

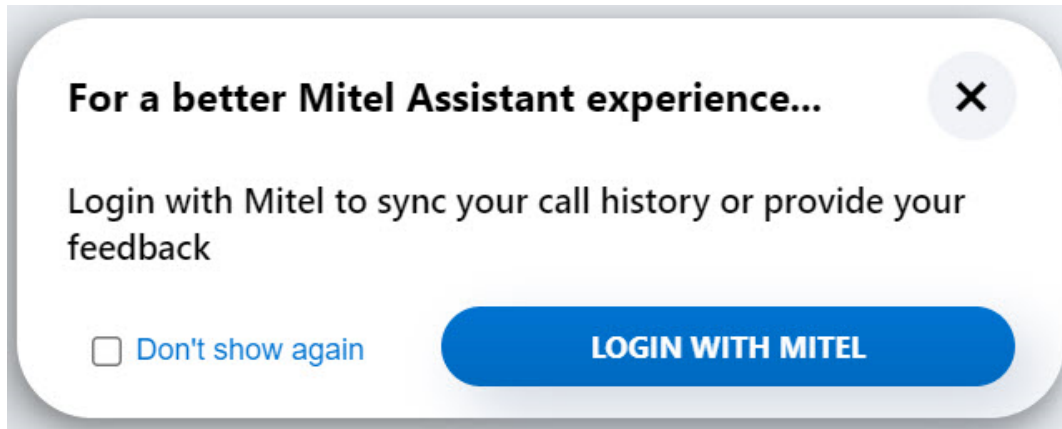
Delete

Cancel

Call History

As a Mitel Assistant user, you can view your Mitel phone call history from the Mitel Assistant application after you log in to your CloudLink account.

If you have not logged in to your CloudLink account, a message as shown below is displayed:



To log in to your CloudLink account from Mitel Assistant:

1.

Click **LOGIN WITH MITEL**, or click the  icon and then click **Sign in**.

2. Enter your login credentials in the **Sign into Mitel** pop up that opens and click **Next**.

You are successfully logged in to your CloudLink account and the **Call History** tab is displayed.

Note:




Mitel recommends that you enable Azure AD SSO and Azure AD sync for your accounts. Enabling Azure AD SSO is recommended so that users can use the same login credentials that they are using in MS Teams. Enabling Azure AD sync is recommended for the alignment of user names between Mitel Assistant and MS Teams.

To view your call history:

Note:

If you want to match the directory contact names in the call history, contact numbers must be saved in a specific format. For more information, see [Mitel MS Teams Solution](#).

1. On the **Call History** panel of the **Call** screen, click the **All** tab.



The **All** tab is displayed with a list of all call logs. Outgoing calls are distinguished by the  icon, and the incoming calls are distinguished by the  icon. Missed calls are distinguished by the  icon.

2. Click the **Missed** tab to view only the missed call logs.

When you hover over a call log entry, the following options are displayed:


Note:

When you use Mitel Assistant from the MS Teams mobile application, you will see the following options when you tap a call log entry.

- **Delete**  - To delete the call log entry
- **Call**  - To call back the chosen contact

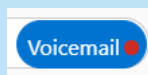
Note:

With MiVoice Business, MiCollab version 9.7 is required for placing calls from the **Call History** tab.

- **Favorites**  - To add the contact to the favorites list.

3. Click the **Voicemail** tab to view all voicemails you received. Click **Call voicemail** to listen to the voicemails.

Note:

- The **Voicemail** feature is available only if your organization has a MiVoice Office 400 PBX or MiVoice Business PBX deployment.
- The application does not display the number of unread voicemails a user receives. Every time a user receives a voicemail, it displays a red indicator on the  (**Voicemail**) tab.

To log out from the CloudLink account or to provide feedback:

1.



Click the icon, and do either of the following:

- Click **Issues and Feedback** to raise an issue or provide feedback.
- Click **Log out** to log out from your CloudLink account.

Note:

When a user submits an issue using the **Issues and Feedback** option in the application, only logs from the Mitel Assistant application are submitted to Mitel. Feedback from MiCollab or Mitel One cross-launch applications are not submitted.

1.10 Presence Status in Microsoft Teams and Mitel Assistant

If your organization has a Mitel MiVoice Office 400, MiVoice 5000, MiVoice Business, or a MiVoice MX-ONE PBX deployment, your administrator can deploy a CloudLink gateway integration and enable the CloudLink-to-MS Teams Presence Integration feature. This synchronizes your PBX presence status. Thus, when you are **Busy** on the phone or Do Not Disturb (DND), you will appear **Busy** to other users in the Teams client.

The presence of users is displayed on user avatars, contact cards, and everywhere in Microsoft applications such as Microsoft Outlook, PowerPoint, the Teams client, and the Mitel Assistant add-on.

Teams automatically sets your presence status in some cases; for example, when you are in a Teams audio call or in meeting. To explicitly set the status yourself, go to your profile at the top of Teams and select one from the list.

Similarly, the CloudLink-to-MS Teams Presence Integration feature will synchronize your presence status from PBX to Teams. Therefore, if you are on a call with your desk phone or MiCollab/Mitel One soft phone, you will appear **Busy** in Teams.

If you explicitly set your presence status on the desk phone or in your Mitel One client, this will also be synchronized with Teams. For example, if you set your presence to Meeting in the desk phone or in the Mitel One client, you will appear **Busy** in Teams.

Note:

Mitel One is only supported on MiVoice Office 400.

If you explicitly set your presence status in the Teams client, that presence status takes precedence over your PBX presence status and is displayed to other users in Teams.

Note:

If a user is logged out of Microsoft Teams, then the presence icon will display an **x** icon and the tool tip will display **Offline**. However, if a user's PBX device changes to busy, then the presence status will update to **Busy**.

For more information about the types of presence states that are available in MS Teams, see the Microsoft documentation [User presence in Teams](#).

For a high-level perspective on how to deploy and integrate CloudLink solution with Microsoft Teams, see [MS Teams Solution Guide](#).

1.11 Removing Mitel Assistant

1. Click the **More added apps** icon (**...**) in the sidebar menu. A dialog box opens displaying all the apps you have installed in your Microsoft Teams application.
2. Right-click the Mitel Assistant app icon and select the **Uninstall** option to remove Mitel Assistant.

